



**Australian Government**

**Department of Education,  
Science and Training**



# **PRD01 Property Development and Management Training Package**

**Volume 4 of 5**

**Version Number: 5**

**Review Date: 31 December 2005**

**ISC** INDUSTRY  
SKILLS  
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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 Property Operations and Development Sector.

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

## **Volume 4 of 5**

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

- Real Estate and Stock & Station Agency Sectors
- Spatial Information Services Sector
- Business Broking Sector
- Access Consulting Sector

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

## **PRD01 Property Development and Management Training Package**

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Published by:

Australian Training Products Ltd  
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Melbourne  
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Phone: +61 3 9655 0600

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First published: 1 June 2001

ISBN: 0 642 80380

Printed by:

Mercury Printeam

AEShareNet Code: P

Print Version No: 5

Release Date: 8/08/2005

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## 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.

## Overview of the Property Operations and Development Sector

The Property Operations and Development Sector of the Property Services Industry provides for the investment, creation and utilisation of property assets within the broader economy. The sector comprises the following broad functional areas:

**(Commercial) Property Managers** - concerned with the day-to-day management of a single property, or multiple properties either for, or on behalf of, private investor/s or public sector owners.

**(Property) Development Managers** - concerned with the management of a real estate development or redevelopment opportunity either for, or on behalf of, private investor/s or public sector owners, for either profit or non-profit situations.

**(Real Estate) Asset Management** - concerned with the structuring of single or multiple investment opportunity for the acquisition of existing or new property/ies, and the management of the investment opportunity over the ownership period of the investment.

**Community and Strata Management** - concerned with the day-to-day operations and management of real property on behalf of an owners corporation or body corporate under relevant community and/or strata schemes legislation.

**Facility Management** - concerned with the practice of integrating the management of people and the business process of the organisation with the physical infrastructure to enhance corporate performance.

### Background to the Development of the Property Operations and Development Sector Competency Standards

Property Operations and Development Sector competency standards were originally developed as part of the draft Property Development and Management Training Package and were due for endorsement in 1999. However, a number of concerns and issues were raised with respect to the packaging of the Property Operations and Development qualifications that resulted in a lengthy delay. The Property Operations and Development competency standards were not included as part of the Property Development and Management Training Package when it was endorsed in 2001.

A Phase 1 review of the Property Operations and Development competency standards was undertaken in June 2002 that included a functional analysis being conducted on all sectors of the industry. That review included recommendations for a qualification structure for the Property Operations and Development Sector consisting of four qualifications ranging from Certificate III through to Advanced Diploma.

Phase 2 of the project involved the redevelopment of the Property Operations and Development competency standards in line with both the recommendations from Phase 1 and current Australian National Training Authority (ANTA) guidelines. This process has included extensive consultation with key representatives from the industry. The Property Operations and Development competency standards create a new vocational pathway for this sector.



# 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](http://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](mailto: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.

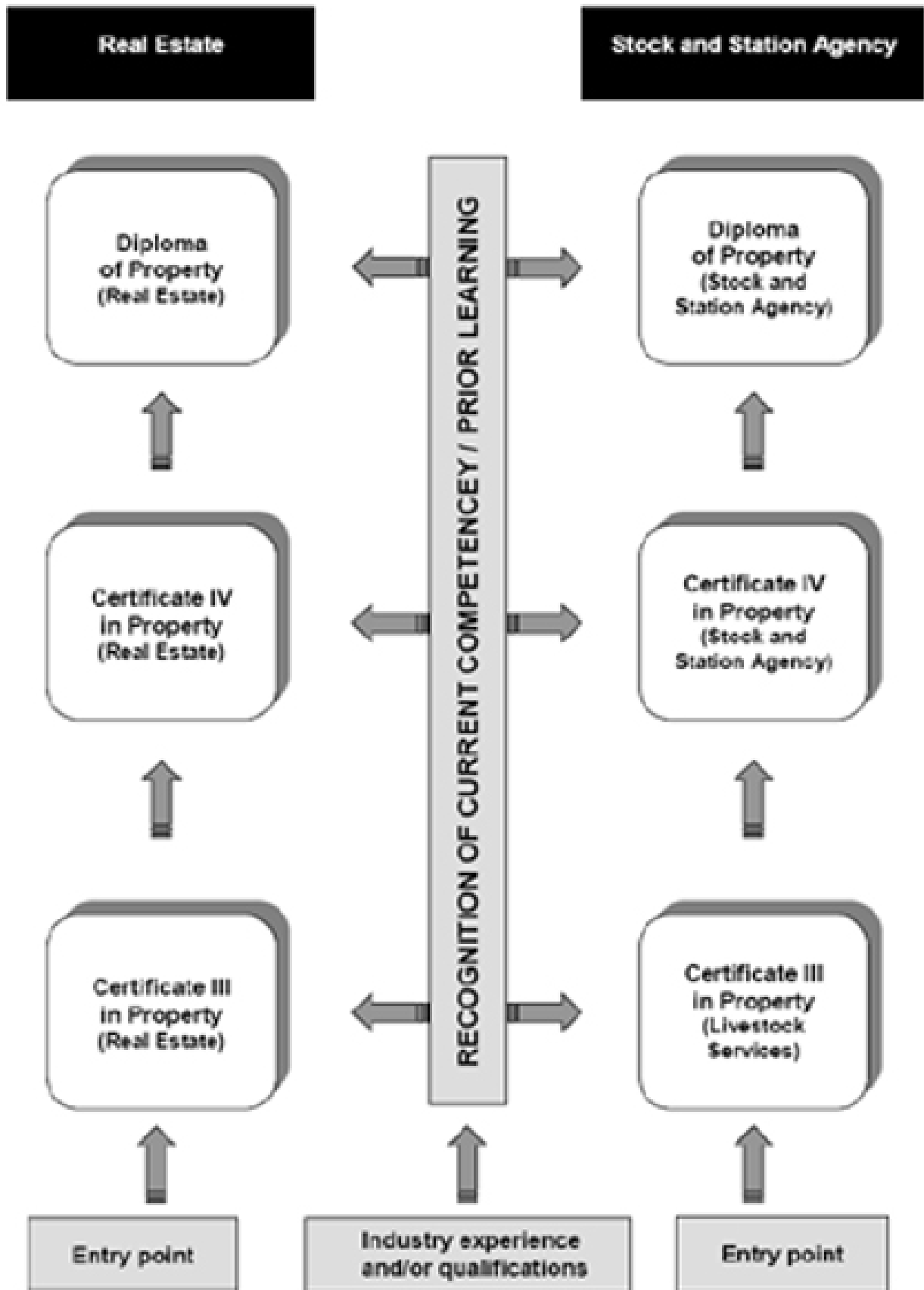
The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.

### *Distinguishing Features of Learning Outcomes*

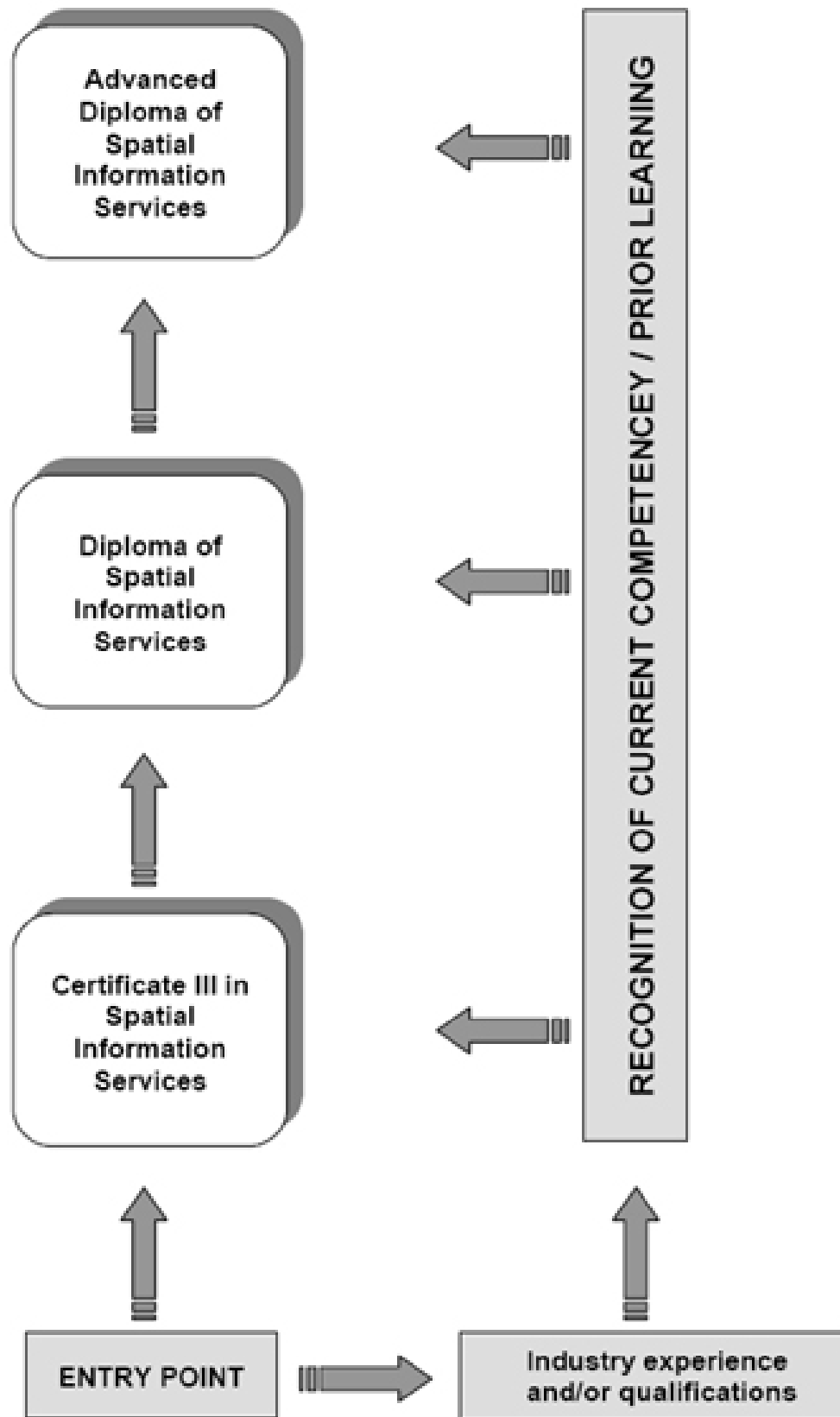
Do the competencies or learning outcomes enable an individual with this qualification to:

- 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.

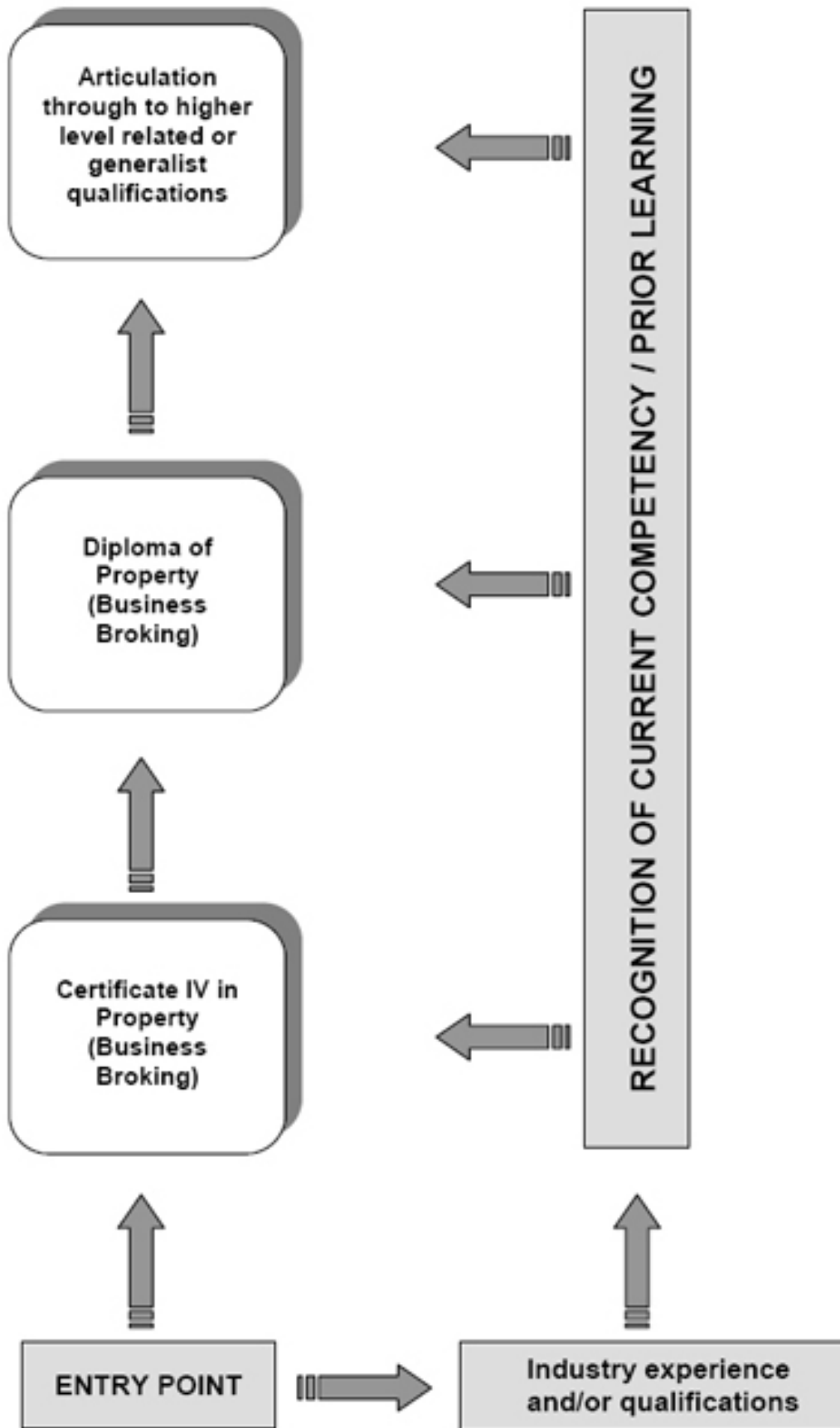
# Real Estate/Stock and Station Agency Qualification Flowchart



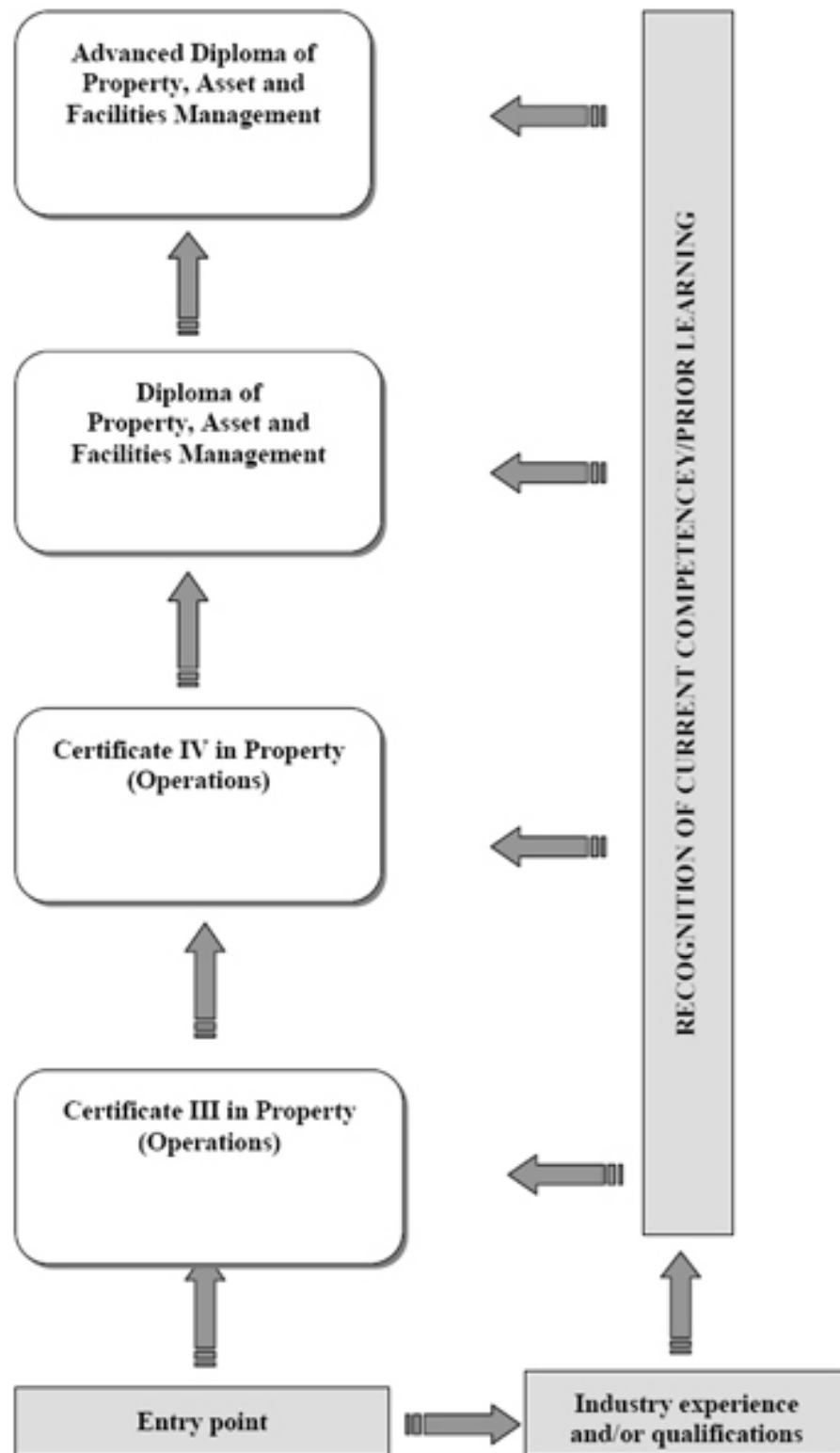
# Spatial Information Services Qualification Flowchart



# Business Broking Qualification Flowchart

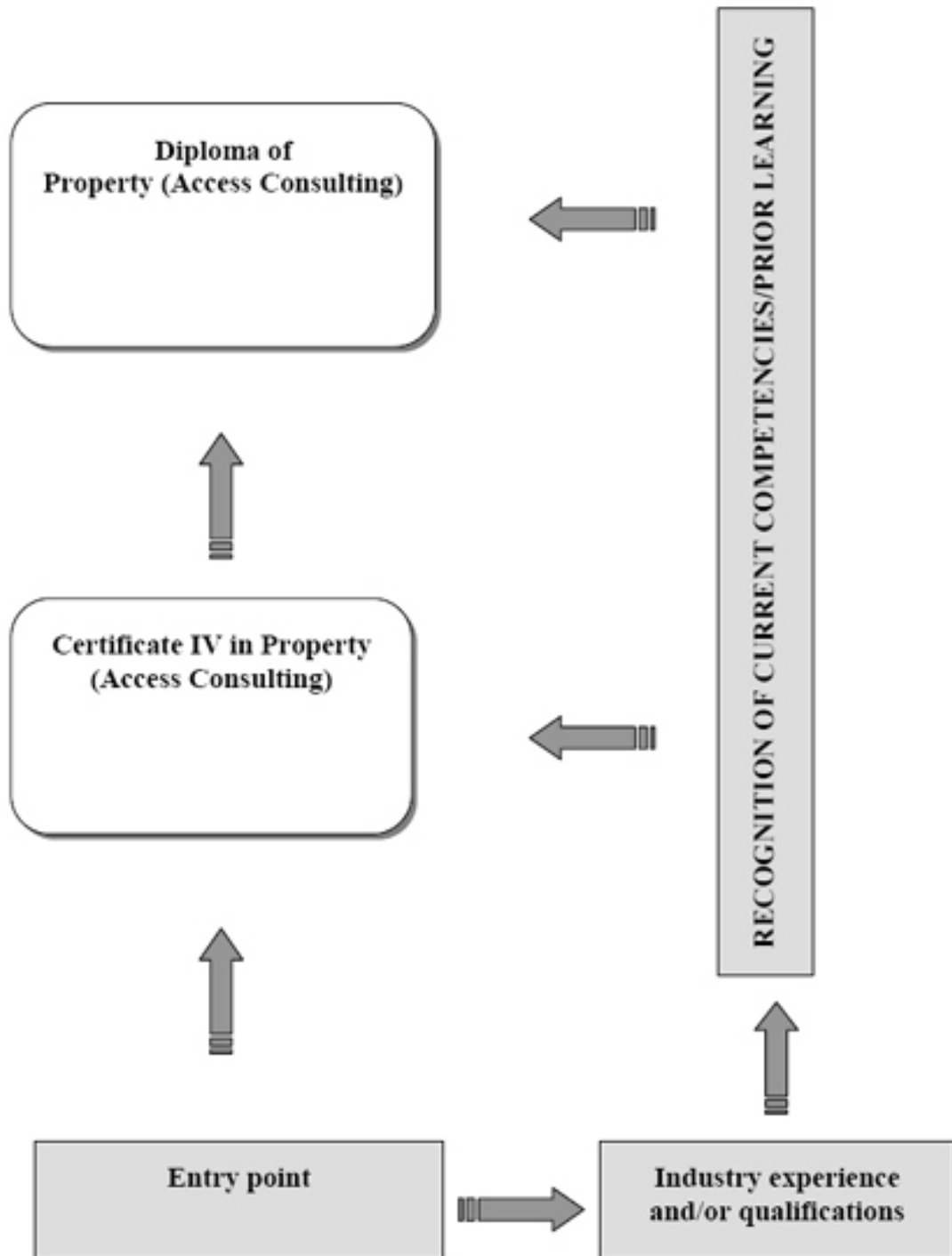


## Property Operations and Development Qualifications Flowchart





## Access Consulting qualifications flowchart



## 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](http://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.

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## 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 <a href="http://www.fairtrading.act.gov.au">www.fairtrading.act.gov.au</a> 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 <a href="http://www.fairtrading.nsw.gov.au">www.fairtrading.nsw.gov.au</a>
Northern Territory	Agents Licensing Board GPO Box 4160 DARWIN NT 0801 Phone (08) 8999 6962 <a href="http://www.nt.gov.au">www.nt.gov.au</a>
Queensland	Office of Fair Trading Client Services Branch GPO Box 3111 BRISBANE QLD 4001 Phone (07) 3245 1523 <a href="http://www.fairtrading.qld.gov.au">www.fairtrading.qld.gov.au</a>
South Australia	Office of Consumer & Business Affairs Business and Occupational Services GPO Box 1719 ADELAIDE SA 5001 Phone (08) 8204 9686 <a href="http://www.ocba.sa.gov.au">www.ocba.sa.gov.au</a>
Tasmania	Auctioneers' & Real Estate Agents' Council of Tasmania 2 Davey Street HOBART TAS 7000 Phone (03) 6234 2700 <a href="http://www.thecouncil.com.au">www.thecouncil.com.au</a>
Victoria	Business Licensing Authority 452 Flinders Street MELBOURNE VIC 3000 Phone (03) 9627 7299 <a href="http://www.bla.vic.gov.au">www.bla.vic.gov.au</a>
Western Australia	Real Estate Agents & Business Agents Supervisory Board 219 St Georges Terrace PERTH WA 6000

	Phone (08) 9282 0871 <a href="http://www.reba.wa.gov.au">www.reba.wa.gov.au</a>
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## 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.

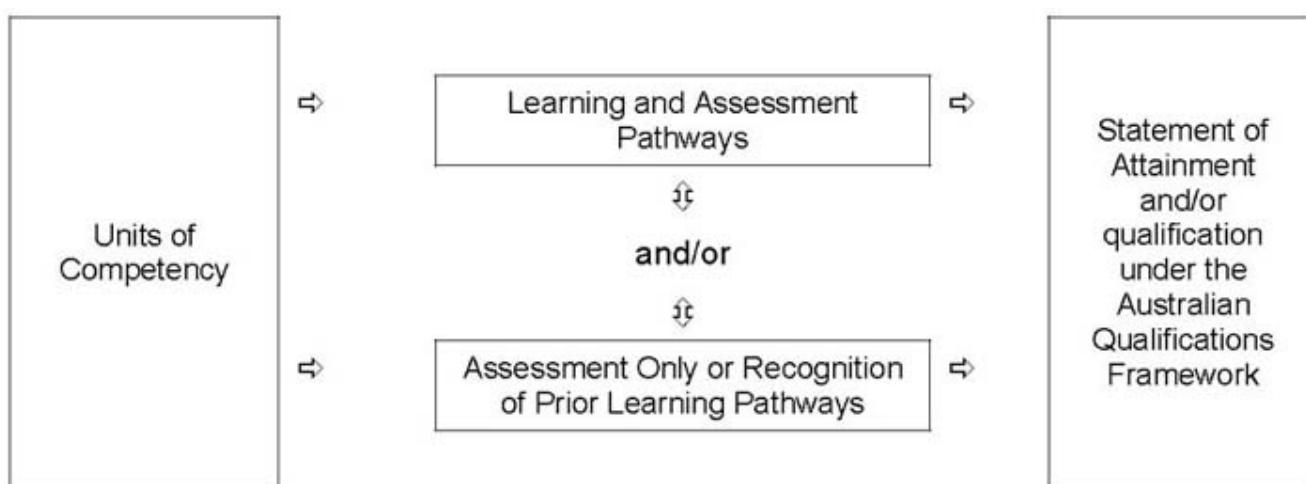
Issues concerning the anticipated impact of regulatory requirements have been integrated into the performance criteria of the relevant units and must be reflected in the assessment process.

## 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 competencies<sup>1</sup> 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.

<sup>1</sup> 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](http://www.atpl.net.au)  
Email: [sales@atpl.net.au](mailto: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](mailto: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](http://aqf.edu.au)

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

Australian Quality Training Framework (AQTF) - for resources and information go to:  
[www.dest.gov.au](http://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](http://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](http://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](http://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](http://www.dest.gov.au). Go to [www.resourcegenerator.gov.au/loadpage.asp?TPAG.htm](http://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.

**PRDPOD301A****Unit Descriptor****Work effectively in the property industry**

This competency standard specifies the outcomes required to apply foundation knowledge to effectively and efficiently work in the property industry. It covers the basic entry-level functions to enable compliance with legislative and procedural requirements. It also requires the ability to identify potential risks associated with a range of activities within the property industry and to identify opportunities for improving own professional development.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Interpret and comply with legislative, financial and procedural requirements | <p>1.1 <i>Legislative, financial and procedural requirements</i> relevant to agency <i>services</i> are identified and interpreted in accordance with <i>client</i> needs and <i>organisational requirements</i></p> <p>1.2 Key principles relating to consumer protection and trade practices are identified and interpreted in accordance with legislative and industry requirements</p> <p>1.3 Own interpretation and application of legislative, financial and procedural requirements is confirmed with <i>relevant people</i> to ensure a consistent and accurate understanding</p> <p>1.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational procedures</p>  |
| 2. Interpret and comply with ethical practices and rules of conduct             | <p>2.1 <i>Regulatory and industry standards, codes of ethics, practice and/or conduct</i> are identified and interpreted in accordance with organisational requirements</p> <p>2.2 Key principles relating to agency ethical values are identified and interpreted in accordance with legislative and industry requirements</p> <p>2.3 Own interpretation and application of ethical and conduct requirements is confirmed with relevant people to ensure a consistent and accurate understanding</p> <p>2.4 Situations requiring specialist advice are identified and assistance sought as required in accordance with organisational procedures</p>   |
| 3. Interpret work role and responsibilities                                     | <p>3.1 Own role and responsibilities are identified and confirmed with relevant people in accordance with organisational requirements</p> <p>3.2 Work tasks are identified, scheduled and completed within designated timeframes in accordance with client and organisational requirements</p> <p>3.3 All work reflects an understanding and respect of individual differences and <i>work practices</i> are adapted as appropriate to meet the <i>specific needs</i> of relevant people</p> <p>3.4 <i>Feedback</i> from clients and colleagues is sought and used to ascertain professional competency, quality of performance and identify key areas for improvement</p> <p>3.5 Information regarding learning and professional development is recorded and maintained in accordance with organisational requirements</p> |

- |  |   |
|--|---|
| 4. Identify risks  | <p>4.1 Potential <i>risks</i> are identified and reported to relevant people in accordance with organisational procedures</p> <p>4.2 Recommendations on appropriate strategies to minimise risks and complaints are discussed with relevant people</p> <p>4.3 <i>Limitations</i> in identifying risk are identified and assistance sought from relevant people in accordance with organisational requirements</p> <p>4.4 Appropriate <i>information collection techniques</i> are used to access information on potential risk from individuals and groups</p>  |
| 5. Complete standard contractual documentation               | <p>5.1 <i>Standard documentation</i> for property operations is completed in accordance with legislative and procedural requirements</p> <p>5.2 <i>Business equipment/technology</i> is used as required to complete documentation in accordance with applicable occupational health and safety (OHS) and organisational requirements</p> <p>5.3 Written information meets organisational standards of language, accuracy and relevance and is used in a legally appropriate manner</p> <p>5.4 All property documentation and information systems are securely maintained in accordance with confidentiality, legislative and organisational requirements</p> |
| 6. Develop understanding of industry employment requirements | <p>6.1 Industry employment and <i>professional development</i> requirements are accessed and interpreted to ensure own continuous professional development</p> <p>6.2 Employee and employer rights and responsibilities including remuneration and awards are accessed and interpreted</p> <p>6.3 Key industry and statutory organisations able to assist own professional development are identified and assistance sought as required</p> <p>6.4 Industry <i>competency standards and other relevant benchmarks</i> are identified and reviewed to establish future professional development needs and priorities</p>                                       |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting to gain an understanding of own work role and responsibilities, and to advise identified areas of potential risk	2
Collecting analysing and organising information	accessing, interpreting and applying legislative and procedural requirements	2
Planning and organising activities	seeking and using feedback from clients and colleagues to ascertain own professional competency	2
Working with others and in teams	completing work tasks within designated timeframes	2
Using mathematical ideas and techniques	measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge discussing recommendations to minimise risk	1
Using technology	accessing information, documenting and maintaining records	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Legislative, financial and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices law and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Services may relate to:**

- residential and commercial real estate
- marketing, sale and leasing of a range of property types
- property management across a range of property types
- on-site residential property management
- strata and community Title Management
- rural agency practice
- business broking
- buyers advocacy/agent



**Clients may include:**

- potential vendors
- vendors
- prospective purchasers
- purchasers
- prospective and existing landlords
- prospective and existing tenants
- owners corporations and community title groups
- agents/third parties for purchasers and vendors
- in-house staff and office contractors
- other agency staff

**Client needs may relate to:**

- communication (verbal, non-verbal)
- language (English, NESB)
- cultural practices and observations
- beliefs, values
- religious and spiritual observances
- social conventions
- cultural stereotypes
- physical/mental disabilities
- conventions of gender/sexuality
- disposable income/financial restraints
- environmental considerations

**Organisational requirements may be outlined and reflected in:**

- agency policies/guidelines
- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- sales, marketing and leasing/management procedure manuals
- policies and procedures in relation to client service
- ethical standards, codes of practice such as:
  - acting in principal's best interests
  - misrepresentation
  - over servicing, fixed charges rather than fee for service
  - declaration of beneficial interest
  - clear communication of services offered and fee for service
  - clear negotiation of fees
- legal and organisational policies/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- consumers

**Specialist advice may be sought from:**

- supervisor/colleagues
- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- OHS representatives
- emergency personnel

**Regulatory, industry and professional association standards and procedures may include:**

- rules of conduct/ethical practices
- legislative and statutory requirements outlined in relevant legislation (eg licensing, property, tenancy, Tribunal and court)
- industry standards
- OHS

**Codes of ethics, practice and/or conduct may relate to:**

- maintaining confidentiality
- use of organisational property
- duty of care
- individual behaviour
- non-discriminatory practices
- declaration of conflict of interest
- acting in principal's best interests
- misrepresentation
- over servicing, fixed charges rather than fee for service
- declaration of beneficial interest
- clear communication of services offered and fee for service
- clear negotiation of fees

**Work practices may relate to:**

- canvassing for relevant business
- appraising for sale or lease
- listing for sale or lease
- preparing for sale by auction
- promoting and marketing of property
- negotiating and executing sales
- negotiating and executing lease arrangements
- managing property
- providing support within an agency
- promoting, advertising, and undertaking administrative duties
- undertaking routine functions within the organisation
- receiving and handling of monies

**Specific needs may relate to:**

- language (verbal, non-verbal, written)
- traditional practices and observations
- beliefs, values
- food, diet
- dress
- religious and spiritual observances
- social conventions
- cultural stereotypes
- conventions of gender/sexuality

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Risks may relate to:**

- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- suppliers and contractors
- changes to regulations and legislation
- time constraints
- emergencies and disasters

**Risks may be identified through:**

- regular informal and informal consultations/meetings with colleagues
- regular housekeeping activities
- ongoing training
- audits and review of audit reports
- workplace inspections in area of responsibility
- checking work area and/or equipment before and during work
- review of OHS records, including registers of hazardous substances, dangerous goods

**Limitations may relate to:**

- job role and responsibilities
- quality processes
- own competency level
- industry requirements
- own understanding of risk identification processes
- own interpretation of legislation, regulations and procedures
- complying with OHS requirements
- legal responsibilities

**Information collection techniques may include:**

- documentation, reports, risk management plans
- incident reporting systems
- surveys (organisational or industry based) and questionnaires
- interviews, questionnaires
- media (newspaper, radio, television, industry magazines)
- group workshops/brainstorming
- discussions with colleagues/clients
- observation checklists

**Standard documentation may include:**

- organisational, industry and other contracts
- property marketing, sale and lease agreements/contracts
- tenancy agreements
- permits
- building codes
- licences
- specifications
- plans
- maps

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Professional development strategies may include:**

- formal/informal learning programs
- work rotation to facilitate changing work priorities
- utilisation of existing strengths to focus future career development
- involvement in community/industry activities
- coaching, mentoring and/or supervision
- updating/maintaining knowledge base on current issues for work/professional practice
- identifying and establishing new career paths

**Competency standards and other relevant benchmarks may relate to:**

- personal and technical knowledge, skills and attitudinal aspects (competencies) required to effectively and efficiently undertake the day-to-day tasks and duties of the work function and specifically:
  - competency standards for the property industry
  - other relevant industry, cross-industry and enterprise competency standards
- other benchmarks such as:
  - industry codes of practice/conduct and code of ethics
  - statutory and legislative requirements in terms of working in the property sector

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately interpreting and complying with relevant legislative, financial and procedural requirements and confirming own understanding and application with relevant people
- accurately interpreting and complying with ethical practices and rules of conduct and checking own understanding and application with relevant people
- identifying a range of potential risks using appropriate information collection techniques, and discussing with relevant people recommendations on strategies to minimise risks
- completing standard contractual documentation ensuring adherence to legislative and procedural requirements, and securely maintaining property information
- accurately interpreting and using industry employment and professional development guidelines and benchmarks, and seeking assistance from key industry and statutory organisations to ensure own continuous professional development
- accurately interpreting and verifying own role and responsibilities and demonstrating an understanding and respect of individual differences in carrying out work tasks

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, social and ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- relevant Commonwealth/State/Territory consumer protection and trade practices legislation with regard to property transactions
- relevant legislation that affects sale, leasing and management of property
- relevant Acts and regulations
- risk factors relating to a variety of transactions
- fundamental knowledge of handling trust monies and office processes
- limitations of work role, responsibility and professional abilities

**Required skills and attributes include:**

- self evaluation skills to:

systematically evaluate own work practices to identify ways to improve performance or understanding

- organisational skills to:
  - create a personal professional development plan
  - prioritise any personal development needs
- communication skills to:
  - interpret and understand legal, financial and procedural requirements
  - identify and complete appropriate documentation
  - read and understand a variety of information
  - follow trust account procedures
- reflection skills to:
  - differentiate between professional and personal values
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - respect individual differences

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting and complying with legislative, financial and procedural requirements, ethical practices and rules of conduct, to completing standard documentation and implementing professional development strategies
- evidence must include documentation showing how legislative and procedural requirements were interpreted and applied, areas of potential risk, and how feedback was obtained and used to plan own continuous professional development

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD302A****Unit Descriptor****Meet customer needs and expectations**

This competency standard specifies the outcomes required to clarify and meet customer needs and expectations in a single encounter or multiple encounters, on a one-to-one basis with a customer. This unit is based upon unit GCSO04A from the Customer Service Generic Guideline Competencies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Identify customer needs and expectations           | <p>1.1 <i>Customer preferences, needs and expectations</i> are identified and clarified in accordance with <i>organisational and legislative requirements</i></p> <p>1.2 Special requirements of customers are promptly identified and appropriate advice provided on relevant products/services</p> <p>1.3 <i>Communication techniques</i> appropriate to relationship and purpose of interaction are used</p> <p>1.4 <i>Limitations</i> in responding to customer needs are identified and advice sought from <i>relevant people</i></p>     |
| 2. Provide identified customer needs and expectations | <p>2.1 Knowledge of specified products/services is applied to provide assistance to customers</p> <p>2.2 Client is provided with options and alternatives where appropriate</p> <p>2.3 Features and benefits of relevant products/services are explained to customers</p> <p>2.4 Special promotions for products/services are suggested to customer in accordance with <i>organisational policies and procedures</i></p> <p>2.5 <i>Feedback</i> is sought from customer that needs, and where practical, expectations, have been satisfied</p> |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and discussing understanding of customer expectations and requirements with colleagues, supervisors and/or customers	2
Collecting analysing and organising information	obtaining and complying with legislative requirements relevant to service delivery	2
Planning and organising activities	prioritising work tasks to meet customer requirements within agreed timeframes	2
Working with others and in teams	obtaining/providing assistance among team members to fulfil customer requirements and organisational requirements	1
Using mathematical ideas and techniques	measuring customer satisfaction	1
Solving problems	identifying and resolving customer complaints or to recognise own limitations and service delivery complications	2
Using technology	accessing and documenting customer service information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**This competency may be expected to apply to situations such as:**

- a direct relationship with the customer (internal or external)
- a need to clarify the needs and expectations of the customer or explore alternative ways of satisfying their needs and expectations
- a range of alternative products/services which might be provided and the best product/service solution for the customer needs and expectations to be found with the customer

**Customers may include but are not limited to:**

- customers with routine or special requests
- internal or external customers
- regular and new customers
- people from a range of social, cultural or ethnic backgrounds
- people with varying physical and mental abilities

**Customer needs and expectations may relate to:**

- information about leases and leasing
- company information on services
- property operations and policy/management procedures
- current and planned property developments
- sales and marketing services
- contract administration

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- occupational health and safety (OHS) policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/ tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- consumer protection
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Communication techniques may include but are not limited to:**

- active listening
- using open and/or closed questions
- speaking clearly and concisely
- using appropriate language and tone of voice
- giving customers full attention
- maintaining eye-contact (for face-to-face interactions)
- non-verbal communication (eg body language and personal presentation for face-to-face interactions)
- clear, legible writing

**Limitations may relate to:**

- job role and responsibilities
- own competency level
- organisational, industry and national training requirements
- knowledge of services
- legal responsibilities

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Knowledge may include, but is not limited to:**

- range of products/services
- features and benefits of products/services
- promotional pamphlets
- supplier information
- written communications on products/services
- other relevant descriptions

**Organisational policies and procedures may be outlined and reflected in:**

- marketing guidelines
- business and performance plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately identifying the needs of customers
- delivering a service to customers in appropriate timeframes
- recommending acceptable alternatives to customers, or explaining to customers why their needs cannot be met
- locating, interpreting and applying relevant information
- using appropriate communication strategies

**Required knowledge and understanding includes but is not limited to:**

- detailed product knowledge and sufficient authority to make choices between the different products/services based on identified customer needs and expectations
- OHS and procedures and guidelines relevant to workplace operations
- importance of good communication when creating customer relationships
- requirements of customer service systems/operations and relevant equipment

**Required skills and attributes include:**

- language skills to:
  - allow for adequate communication with the customer
- literacy skills to:
  - process complaints
- numeracy skills to:
  - interpret customer requirements and meet their needs
- problem solving skills to:
  - identify and solve problems when creating customer relationships
- skills to identify and correctly use processes and procedures relevant to customer relationships
- application skills to:
  - apply relevant agreements, codes of practice or other legislative requirements to work processes
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting customer needs to recommending alternatives to meet those needs
- evidence must include documentation showing how workplace procedures have been applied, what information/advice was given to at least two different customers with differing needs

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD303A****Unit Descriptor****Maintain workplace safety**

This competency standard specifies the outcomes required to follow defined occupational health and safety (OHS) policies and procedures to ensure own safety and that of others in the workplace. It requires the ability to identify and control workplace risks and hazards, apply appropriate responses to emergency situations, and communicate workplace safety requirements. The unit is based on Generic Competency A in the National Guidelines for Integrating Occupational Health and Safety Competencies into National Industry Competency Standards.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Assist implementation of safety policy and procedures into the workplace | 1.1 Workplace safety requirements relevant to own role and responsibilities are identified and complied with in accordance with <i>legislative and organisational requirements</i><br>1.2 Organisational information outlining <i>OHS policies and procedures</i> is identified and accessed<br>1.3 Information identifying and controlling workplace <i>risks and hazards</i> is reviewed in accordance with organisational procedures<br>1.4 All work is conducted using safe workplace practices in accordance with OHS policies and procedures and organisational requirements |
| 2. Follow workplace procedures for hazard identification and risk control   | 2.1 Hazards in work area are recognised and reported to <i>relevant people</i> in accordance with organisational requirements<br>2.2 Workplace instructions and procedures for controlling risks and hazards are followed accurately<br>2.3 Emergency procedures are followed correctly in accordance with OHS and organisational requirements<br>2.4 Workplace procedures for dealing with emergency situations are followed within scope of own role, responsibilities and competencies  |
| 3. Contribute to participative arrangements for management of OHS           | 3.1 OHS issues are raised with relevant people in accordance with legislative and organisational requirements, including applicable OHS policies and procedures<br>3.2 Colleague contributions to <i>participative arrangements</i> for OHS management in the workplace are encouraged   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing and verifying workplace safety procedures with colleagues or the supervisor to ensure compliance with OHS requirements	2
Collecting analysing and organising information	obtaining and complying with relevant OHS legislative material and workplace documentation	2
Planning and organising activities	monitoring work areas prior and during work activities to minimise risks and hazards	2
Working with others and in teams	carrying out safety inspections to control workplace risks and hazards	1
Using mathematical ideas and techniques	measuring and scheduling tasks	1
Solving problems	identifying hazardous workplace situations and reporting required actions	2
Using technology	communicating, accessing, organising and recording information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Legislative and procedural requirements may be outlined and reflected in:

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices
- privacy requirements

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs

**OHS policies and procedures may relate to:**

- hazard and risk identification and reporting
- risk assessment and control measures
- incident/accident investigation
- OHS audits and safety inspections
- consultative arrangements for employees
- safe operating procedures/instructions
- use and maintenance of personal protective clothing and equipment
- emergency and evacuation procedures
- equipment maintenance and use
- use and storage of hazardous substances
- transport and storage of dangerous goods
- on-site contractors, visitors and members of public
- first aid

**Risks and hazards may be identified through:**

- regular inspections of equipment and work areas
- continuous monitoring of equipment operation and work areas prior to and during work activities
- regular informal and formal consultations/meetings with colleagues
- regular housekeeping activities
- ongoing training
- review of health and safety records:
  - hazard reports
  - hazardous substances
  - dangerous goods registers

**Risks and hazards may be:**

- ergonomic
- environmental
- mechanical, electrical
- loose objects and fixtures
- hazardous materials
- obstructions

**Relevant people may include:**

- supervisors
- colleagues
- clients
- emergency personnel
- designated OHS representatives



**Procedures for controlling risks and hazards may include:**

- hazard, accident and incident reporting procedures
- following safe operating procedures
- emergency, fire and accident procedures
- compliance with ergonomic and environmental requirements
- safe lifting and manual handling procedures
- regular OHS consultations
- correct selection, use, storage and maintenance procedures for personal protective clothing and equipment

**Participative arrangements may relate to:**

- formal and informal meetings to discuss OHS matters
- OHS committees (eg consultative, planning and purchasing)
- OHS representation
- employee suggestions, requests and concerns to management

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately identifying potential or existing risks, hazards and incidents in the workplace
- contributing and participating in workplace OHS arrangements
- following appropriate OHS risk/hazard response procedures within scope of own role and responsibilities
- carrying out work activities in a safe manner using safe operating practices and procedures

**Required knowledge and understanding includes but is not limited to:**

- techniques to control risks (hierarchy of control)
- range of workplace hazards and risks and control measures
- types and purposes of personal protective clothing and equipment
- rights and responsibilities of employers and employees with regard to OHS legislation
- range and meanings of OHS safety signs and symbols
- organisational communication channels and procedures
- workplace OHS management processes and designated personnel

**Required skills and attributes include:**

- evaluation skills to:
  - identify potential or existing risks and hazards in the workplace
  - interpret and comply with OHS safety signs and symbols
- communication skills to:
  - accurately follow written and verbal instructions
  - accurately record and report details of incidents in the work area
  - clearly explain information on OHS issues
- application skills to:
  - follow safe operating practices and procedures when using tools and equipment
  - comply with ergonomic and environmental protection requirements
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- a suitable work area for identification of hazards and control measures
- personal protective equipment
- health and safety policies and procedures
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting OHS requirements to participating in OHS management in the workplace
- evidence must include documentation of OHS issues discussed with colleagues and/or management, hazard/risk identification summary, correct use of equipment

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD304A****Unit Descriptor****Identify risks and opportunities**

This competency standard specifies the outcomes required to identify risks and opportunities to maintain effective asset utilisation. It requires the ability to identify key systems and assets, and an understanding of risk management processes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Identify risks and opportunities                   | <p>1.1 Appropriate <i>interpersonal techniques</i> are used to specify and access <i>information</i> on potential <i>risks</i> and <i>opportunities</i> from individuals and groups</p> <p>1.2 Relevant <i>legislative requirements</i>, insurance, codes and standards applicable to <i>asset</i> use are identified and examined to establish risk/opportunity parameters</p> <p>1.3 Potential risks/opportunities to <i>clients</i> and organisation are identified and confirmed with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.4 <i>Limitations</i> in identifying risks/opportunities are identified and <i>specialist advice</i> sought as required in accordance with organisational requirements</p> <p>1.5 Any gaps/breaches in established risk management processes are promptly identified and reported in accordance with organisational policies and procedures</p> |
| 2. Document and report identified risks/opportunities | <p>2.1 Identified risks/opportunities are documented in a suitable format in accordance with organisational and legislative requirements</p> <p>2.2 Risk/opportunity findings are documented in a clear and concise manner and are supported by verifiable evidence</p> <p>2.3 <i>Feedback</i> is actively sought to ensure sufficiency and relevance of information in meeting client and organisational requirements</p> <p>2.4 <i>Business equipment/technology</i> is used to maintain information in accordance with applicable occupational health and safety (OHS) and organisational requirements</p> <p>2.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting with individuals or groups to obtain an understanding of the current operating environment	2
Collecting analysing and organising information	gathering information from reliable and verifiable sources to determine potential or existing risks and opportunities	2
Planning and organising activities	developing criteria to use as a basis for measuring the level of risk	2
Working with others and in teams	seeking feedback and/or assistance as required to complete work tasks	1
Using mathematical ideas and techniques	assessing assets or activities	1
Solving problems	identifying contingency requirements to minimise loss in the event of risk realisation	2
Using technology	sourcing, organising, recording and presenting information in suitable formats	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Interpersonal techniques may include:

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Information may be collected from:**

- property inspections
- documentation, reports, risk management plans
- incident reporting systems
- surveys (organisational or industry based) and questionnaires
- interviews
- media (newspaper, radio, television, industry magazines)
- group workshops/brainstorming
- discussions with colleagues/clients
- observation checklists

**Risks may relate to:**

- public liability
- industry special risks
- machinery malfunction
- loss of profits
- trade practices issues
- OHS

**Opportunities may relate to:**

- creating something new
- altering existing property/facility
- changing style of investment
- aggregation of assets
- adding value
- change in use, ownership, appearance, perception of property/facility
- use of bankers and financiers

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Assets may include:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Clients may include:**

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management
- insurers
- risk assessors
- legal advisers
- brokers

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Limitations may relate to:**

- job role and responsibilities
- quality processes
- own competency level
- industry requirements
- own understanding of risk/opportunity identification processes
- complying with OHS requirements
- legal responsibilities

**Specialist advice may be sought from:**

- facilities and asset managers
- architects
- planners
- builders
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- OHS representatives
- emergency personnel

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- obtaining information from a wide range of sources to ensure an accurate understanding of risk/opportunity management processes
- establishing risk/opportunity parameters and identifying a range of potential risks and opportunities in key systems and assets
- preparing risk/opportunity findings in a format suitable for presentation and review using standardised styles and formats



**Required knowledge and understanding includes but is not limited to:**

- mechanisms to obtain and analyse feedback
- insurance policies, codes and operations
- relevant legislation regarding risk, including OHS
- property operations historical and precedent regarding risk to operations and areas of potential opportunity
- risk management concepts and practices within the property industry
- client and organisational confidentiality requirements
- methods to identify and prioritise a range of risks and opportunities
- limitations of work role, responsibility and professional abilities

**Required skills and attributes include:**

- communication skills to:
  - use interviewing and questioning techniques to obtain information
- technical skills to:
  - complete OHS reports
- organisational skills to:
  - plan timelines and reporting mechanisms
  - record and file information
- observation skills to:
  - accurately identify existing or potential risks and opportunities
  - identify gaps in information and gather necessary information from alternative sources
- problem solving skills to:
  - apply reasoning and logical analysis to make decisions
  - evaluate information against risk/opportunity assessment strategies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from collecting information on known and potential risks and opportunities to reporting findings
- evidence must include a report which identifies and reviews risks and opportunities in a typical property operations environment, contribution to a working risk management plan, identified gaps in organisational policies and procedures

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD305A****Unit Descriptor****Monitor building facilities**

This competency standard specifies the outcomes required to monitor building facilities to ensure maintenance/service problems are identified and resolved. It requires the ability to identify and arrange necessary maintenance/service work and to check the results against work orders.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Identify maintenance/service requirements | <ul style="list-style-type: none"> <li>1.1 <i>Maintenance/service requirements</i> of building facilities are specified and confirmed against <i>work order</i> in accordance with organisational requirements</li> <li>1.2 Work practices and timelines are discussed and agreed with relevant people in accordance with <i>organisational requirements</i></li> <li>1.3 <i>Site access and specific site requirements</i> are verified and appropriate arrangements made as required in accordance with <i>client</i>, organisational and <i>legislative requirements</i></li> <li>1.4 <i>Communication channels</i> and processes are established and verified with relevant people in accordance with organisational requirements</li> </ul>  |
| 2. Monitor building facilities               | <ul style="list-style-type: none"> <li>2.1 Building facilities are monitored against work order to ensure completion occurs within designated timeframes</li> <li>2.2 Maintenance/service requirements are identified and noted in accordance with applicable occupational health and safety (OHS) and organisational requirements</li> <li>2.3 Breaches of <i>building controls</i> are recognised and reported to relevant people for action in accordance with organisational procedures</li> <li>2.4 Appropriate <i>interpersonal techniques</i> are used to discuss any issues or concerns with relevant people in accordance with organisational requirements</li> <li>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 3. Arrange for routine maintenance/service   | <ul style="list-style-type: none"> <li>3.1 Routine maintenance/service to building facilities is arranged in accordance with client, organisational and legislative requirements</li> <li>3.2 Notification of completed maintenance/service is received and confirmed in accordance with organisational procedures</li> <li>3.3 Inspection is arranged to confirm maintenance/service has been effectively carried out in accordance with work order, client and organisational requirements</li> <li>3.4 <i>Business equipment/technology</i> is used to maintain relevant documentation in accordance with applicable OHS, legislative and organisational requirements</li> </ul>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing access arrangements and negotiating timelines for monitoring activities	2
Collecting analysing and organising information	sighting and noting maintenance/service requirements during building facilities checks	2
Planning and organising activities	coordinating maintenance/service arrangements and checking work performed	2
Working with others and in teams	collaborating with relevant people to coordinate maintenance/service arrangements and seeking specialist advice as required	1
Using mathematical ideas and techniques	planning, measuring and scheduling tasks within timelines	1
Solving problems	identifying maintenance/service requirements during building facilities checks	2
Using technology	organising, recording and maintaining documentation	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Maintenance/service requirements include, but are not limited to:**

- regular services (eg waste removal, cleaning, grounds maintenance)
- inspections, lubrication, cleaning and adjustments
- routine repairs, maintenance or service
- identification and replacement of worn parts
- confirmation of operational effectiveness
- changing user codes
- back-ups
- repairs, maintenance or service under warranty

**Work order information may relate to:**

- work schedules
- maintenance, service, repair requirements and tasks
- work authorisations
- completion dates
- authorised contractors
- authorised maintenance/service personnel
- warranties and service information

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Site access and specific site requirements may relate to:**

- access and egress points
- time of access
- access codes
- keys, passes, security clearance
- union requirements
- OHS requirements
- building codes and regulations
- heritage listings
- noise control

**Clients may include:**

- building facilities owners
- building facilities agents
- tenants
- building supervisors
- managers
- project managers
- government and legal instruments/agencies

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices laws and guidelines
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- consumer protection
- public health
- freedom of information
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Building controls may relate to:**

- access procedures
- exit procedures
- alarms
- fire equipment

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Specialist advice may be sought from:**

- supervisor
- colleagues
- valuers
- architects
- planners
- builders
- solicitors
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- OHS representatives
- emergency personnel

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- verifying maintenance/service requirements against work order and consulting with relevant people to arrange access to building facilities
- ensuring effective communication flow during monitoring of building facilities and identifying required maintenance/service work
- inspecting completed maintenance/service work against work order and using business equipment/technology to maintain relevant documentation

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- relevant Acts, codes and regulations
- basic requirements for building function checks
- basic knowledge of property contracts and administrative requirements
- organisational and professional procedures, ethical practices and business standards
- points of contact with emergency service agencies
- common hazards to public and personal safety associated with particular types of maintenance work in buildings
- BCA requirements

**Required skills and attributes include:**

- organisational skills to:
  - arrange maintenance/service work
  - schedule and carry out tasks within timelines
- communication skills to:
  - interpret written and oral information
  - complete documentation and report findings
  - discuss client requirements and access arrangements
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- problem solving skills to:
  - manage maintenance/repair problems
- observation skills to:
  - assess operational condition of building facilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from verifying maintenance/service requirements to monitoring building facilities and arranging necessary maintenance/service work
- evidence must include relevant documentation showing consultation between parties concerned with maintenance/service work, copies of work orders and checklists, and completed maintenance/service documentation

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD306A****Unit Descriptor****Collect and process property information**

This competency standard specifies the outcomes required to gather and organise property information in a format which is suitable for decision making. It requires the ability to obtain information from a variety of sources and to review information requirements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Identify and collect property information | <ul style="list-style-type: none"> <li>1.1 Required <i>property information</i> is accurately specified and collected in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Sources of property information</i> are identified and accessed in accordance with applicable <i>legislative requirements</i></li> <li>1.3 Methods of collecting property information are reliable and make efficient use of <i>business equipment/technology</i> and available time and resources</li> <li>1.4 Appropriate <i>interpersonal techniques</i> are used to collect property information in accordance with organisational policies and procedures</li> </ul> |
| 2. Organise information                      | <ul style="list-style-type: none"> <li>2.1 Information is organised in a <i>suitable format</i> to allow analysis and decision making in accordance with organisational requirements</li> <li>2.2 Information is assessed for relevance and accuracy and is consistent with organisational reporting requirements</li> <li>2.3 Appropriate business equipment/technology is selected and used to organise and store information in accordance with organisational requirements</li> <li>2.4 All property information is securely maintained with due regard to client confidentiality in accordance with legislative and organisational requirements</li> </ul>   |
| 3. Review information needs                  | <ul style="list-style-type: none"> <li>3.1 Property information is reviewed in consultation with relevant people to confirm sufficiency of information</li> <li>3.2 Gaps in data collection are promptly identified and additional information sourced where necessary</li> <li>3.3 Property information database is maintained in accordance with own role and responsibility</li> <li>3.4 <i>Feedback on future information needs</i> is obtained and incorporated into existing information collection and reporting processes</li> </ul>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	confirming property information and data requirements with clients and colleagues	2
Collecting analysing and organising information	using established processes to source and collate information	2
Planning and organising activities	developing a plan or timetable for gathering property information	2
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and receive feedback	1
Using mathematical ideas and techniques	accessing and interpreting property information	2
Solving problems	adapting information gathering activities to obtain additional data	2
Using technology	sourcing, collating and formatting property data	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property information may include information relating to:**

- leasing rates
- construction costs
- occupancy rates
- operating costs
- depreciation schedules
- company services
- policy/management procedures
- current and planned property/site developments
- sales information
- marketing services

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Sources of property information may include:**

- property reports
- qualitative and/or quantitative data
- newspapers and journals
- policy statements
- local, State and Commonwealth government documents and registers
- Internet, intranet
- television, radio

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- consumer protection
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Interpersonal techniques may include:**

- consultation methods
- seeking feedback
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences

**Suitable format may relate to:**

- using tables and charts
- using a particular software application
- incorporating graphics and pictures
- using standardised forms

**Feedback on future information needs may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining information requirements and providing property information to meet identified and defined purposes
- sourcing, organising and using information in compliance with applicable industry and legal requirements
- identifying and addressing gaps in collected data
- using consultative processes to review, maintain and improve existing information collection and reporting processes

**Required knowledge and understanding includes but is not limited to:**

- organisational record keeping/filing systems
- security procedures and safe record keeping practices
- organisational policies and procedures including customer service procedures
- types of property information management systems
- internal and external sources of property information and data
- procedures for using office equipment and technology
- software applications which can be used to access, store and maintain data
- OHS issues and requirements
- relevant legislation and statutory requirements

**Required skills and attributes include:**

- technology skills to:
  - use software packages to gather and organise information
  - select and use technology appropriate to the task
- literacy skills to:
  - read and understand a variety of information
  - prepare and present information in a suitable format
  - proofread and check for accuracy of information
- organisational skills to:
  - maintain records and databases
  - use organisational filing systems
- problem solving skills to:
  - solve routine database problems
  - source additional information if required
- interpersonal skills to:
  - liaise with relevant people to obtain property information
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- planning skills to:
  - prioritise information requests

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying and sourcing information requirements to updating and maintaining information databases
- evidence must include at least two types of property data which have been obtained, listing of sources of data regularly accessed, a database of information which has been updated, evidence of information which has been checked for accuracy, feedback obtained on appropriateness and sufficiency of information

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD307A****Unit Descriptor****Undertake property inspection**

This competency standard specifies the outcomes required to inspect various types of property for conditions and compliance with approved requirements. It requires the ability to communicate effectively with those involved in the inspection process, and to have a clear understanding of methods for carrying out and reporting the results of a property inspection.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Identify inspection requirements      | <p>1.1 Purpose and <i>type of inspection</i> is established from property records in accordance with <i>client</i> and <i>organisational requirements</i></p> <p>1.2 <i>Inspection processes</i> and timelines are negotiated and agreed with <i>relevant people</i> in accordance with organisational requirements</p> <p>1.3 <i>Property documentation</i> and <i>legislative requirements</i> are specified, gathered and reviewed to identify critical aspects requiring inspection</p> <p>1.4 Access arrangements are coordinated with relevant people in accordance with organisational requirements</p>  |
| 2. Inspect property                      | <p>2.1 Property is inspected in accordance with industry and organisational requirements, ensuring all relevant aspects of the property are sighted and noted</p> <p>2.2 Inspection processes are reliable and make efficient use of available time and resources in accordance with organisational requirements</p> <p>2.3 Appropriate <i>interpersonal techniques</i> are used to access relevant information from <i>inspection site</i> personnel</p> <p>2.4 Variations in compliance with approved requirements are recognised and noted in accordance with organisational and legislative requirements</p> <p>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</p> |
| 3. Record and report inspection findings | <p>3.1 Inspection findings are organised in a format suitable for analysis and dissemination in accordance with client and organisational requirements</p> <p>3.2 Inspection conclusions are supported by <i>verifiable evidence</i> and are consistent with relevant legislative and organisational requirements</p> <p>3.3 <i>Business equipment/technology</i> is used to maintain relevant documentation in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements</p> <p>3.4 Inspection report is distributed promptly to relevant people in accordance with client and organisational requirements</p>  |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing access arrangements and timelines for conducting a property inspection	2
Collecting analysing and organising information	sighting and noting variations in compliance during a property inspection	2
Planning and organising activities	identifying the purpose and type of inspection from property records and coordinating inspection processes	2
Working with others and in teams	conducting and completing a property inspection within designated timeframes	1
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge and seeking specialist advice as required	2
Using technology	documenting and formatting a property inspection report	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Type of inspection may be:

- statutory
- planned
- periodic
- irregular
- at change of use
- at development stage
- related to a complaint
- related to illegal works and/or usage

**Clients may include:**

- property owners
- property agents
- tenants
- building supervisors
- project managers
- agents
- government and legal instruments/agencies

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Inspection processes may relate to:**

- timeframes
- statutory limitations
- the type of job
- the complexity of construction
- the type of construction

**Relevant people may include:**

- supervisors
- site personnel
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Property documentation may include:**

- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans
- checklists
- previous inspection reports

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Interpersonal techniques may relate to:**

- verbal or non-verbal language
- two-way interaction
- constructive feedback
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- the use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques

**Inspection site may include:**

- new buildings
- alterations
- existing buildings
- ruinous structures
- dangerous structures
- environmental conditions
- multiple locations
- land and/or structures

**Specialist advice may be sought from:**

- valuers
- planners
- builders
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- manager/supervisor
- colleagues

**Verifiable evidence may include:**

- qualitative/quantitative data
- visual assessment of the physical and aesthetic aspects of the property
- inspection checklists, records and notes

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- conducting and completing a property inspection within agreed timeframes and in compliance with all applicable industry, legal and organisational requirements
- applying effective communication and coordination techniques required to access property and organise inspection
- complying with established inspection processes, noting any variations in approved property requirements, and preparing findings in a report suitable for analysis and dissemination

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- BCA requirements
- types of property classes and characteristics
- basic knowledge of property contracts and administrative requirements
- inspection methods for different property types

**Required skills and attributes include:**

- organisational skills to:
  - plan and arrange a property inspection
  - schedule and meet timelines
- communication skills to:
  - interpret written and oral information
  - complete documentation and report findings
  - negotiate client requirements and access arrangements
- observation skills to:
  - assess condition of property

## technical skills to:

- use business equipment to complete reports
- interpret maps/plans/diagrams, and so on
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable site for property inspection
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying inspection requirements to undertaking a property inspection and reporting the findings
- evidence must include relevant property documentation including notes from at least two property inspections and copies of the property inspection reports

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD308A****Work effectively in the strata/community management sector****Unit Descriptor**

This competency standard specifies the outcomes required to apply foundation knowledge to effectively and efficiently work in the strata/community management sector. It covers the basic entry-level functions to enable compliance with legislative and ethical requirements. It also requires the ability to identify potential risks associated with a range of activities within the sector and to identify opportunities for improving own professional development.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Interpret and comply with legislative, ethical and procedural requirements | <ul style="list-style-type: none"> <li>1.1 <i>Legislative, ethical and procedural requirements</i> relevant to strata/community management services are identified and accessed in accordance with <i>client needs</i> and <i>organisational requirements</i></li> <li>1.2 Key principles relating to agency legislative, ethical and procedural values are identified and interpreted</li> <li>1.3 Own interpretation and application of legislative, ethical and procedural requirements is confirmed with <i>relevant people</i> to ensure consistency</li> <li>1.4 Breaches of organisational <i>codes of ethics, practice and/or conduct</i> are recognised and reported in accordance with organisational requirements</li> <li>1.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational procedures</li> </ul> |
| 2. Implement effective work practices   | <ul style="list-style-type: none"> <li>2.1 Strata/community management <i>work practices</i> are implemented in accordance with client instructions and organisational requirements</li> <li>2.2 Work tasks are identified, scheduled and completed within designated timeframes in accordance with industry, legislative and organisational requirements</li> <li>2.3 Factors affecting the achievement of work tasks are promptly identified and reported to relevant people in accordance with organisational procedures</li> <li>2.4 Own work practices demonstrate a commitment to compliance with applicable legislative, ethical and procedural requirements</li> </ul>   |

- |   |  |
|---|--|
| 3. Complete standard contractual documentation  | <p>3.1 <i>Standard documentation</i> for strata/community management operations is completed in accordance with legislative and procedural requirements</p> <p>3.2 <i>Business equipment/technology</i> is used as required to complete documentation in accordance with applicable occupational health and safety (OHS) and organisational requirements</p> <p>3.3 Written information meets organisational standards of language, accuracy and relevance and is used in a legally appropriate manner</p> <p>3.4 Own professional obligations and responsibilities in completing industry documentation are recognised and applied</p> <p>3.5 All documentation is securely maintained with due regard to confidentiality, legislative and organisational requirements</p>  |
| 4. Identify risks                               | <p>4.1 Potential <i>risks</i> are identified and reported to relevant people in accordance with organisational procedures</p> <p>4.2 Recommendations on appropriate strategies to minimise risks and complaints are discussed with relevant people</p> <p>4.3 Appropriate practices for receiving and handling monies are identified and applied in accordance with organisational and legislative requirements</p> <p>4.4 Appropriate security arrangements for the management of property and facilities are identified and applied in accordance with organisational and legislative requirements</p> <p>4.5 <i>Limitations</i> in identifying risk are identified and assistance sought from relevant people in accordance with organisational requirements</p>  |
| 5. Develop and maintain professional competence | <p>5.1 Own <i>professional development</i> is maintained in consultation with relevant people in accordance with organisational requirements</p> <p>5.2 <i>Feedback</i> from clients and colleagues is used to ascertain professional competency, quality of performance and identify key areas for improvement</p> <p>5.3 Personal knowledge and skills in providing strata/community management services are reviewed against <i>competency standards and other relevant benchmarks</i> to establish professional development needs and priorities</p> <p>5.4 Strategies to maintain currency of professional competency in providing effective strata/community management services are identified, scheduled and implemented</p> <p>5.5 Information regarding learning and professional development is recorded and securely maintained in accordance with organisational requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting to gain an understanding of own work role and responsibilities, and to advise areas of identified potential risk	2
Collecting analysing and organising information	accessing, interpreting and applying legislative, ethical and procedural requirements	2
Planning and organising activities	seeking and using feedback from clients and colleagues to ascertain own professional competency  scheduling and implementing professional development strategies	2
Working with others and in teams	completing work tasks within designated timeframes	2
Using mathematical ideas and techniques	measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge  discussing recommendations to minimise risk	2
Using technology	accessing information, documenting and maintaining records	1



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Legislative, ethical and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices law and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

### **Services may relate to:**

- residential and commercial/industrial property
- property and facilities management across a range of property types

### **Clients may include:**

- strata companies
- potential and existing owners
- prospective and existing tenants
- owners corporations/body corporate and community title groups
- agents/third parties for owners
- in-house staff and office contractors

**Client needs may relate to:**

- communication (verbal, non-verbal)
- language (English, NESB)
- cultural practices and observations
- beliefs, values
- religious and spiritual observances
- social conventions
- cultural stereotypes
- physical/mental disabilities
- conventions of gender/sexuality
- disposable income/financial restraints
- environmental considerations

**Organisational requirements may be outlined and reflected in:**

- agency policies/guidelines
- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- sales, marketing and leasing/management procedure manuals
- policies and procedures in relation to client service
- legal and organisational policies/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice such as:
  - acting in principal's best interests
  - misrepresentation
  - over servicing, fixed charges rather than fee for service
  - declaration of beneficial interest
  - clear communication of services offered and fee for service
  - clear negotiation of fees
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- consumers

**Codes of ethics, practice and/or conduct may relate to:**

- maintaining confidentiality
- use of organisational property
- individual behaviour
- non-discriminatory practices
- declaration of conflict of interest
- acting in principal's best interests
- misrepresentation
- over servicing, fixed charges rather than fee for service
- declaration of beneficial interest
- clear communication of services offered and fee for service
- clear negotiation of fees
- accurate determination and clarification of owners corporation expectations
- disclosure of relevant information including management fees
- representation of organisation and clients
- fair and honest provision of property services
- over servicing, fixed charges rather than fee for service

**Specialist advice may be sought from:**

- supervisor/colleagues
- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Work practices may relate to:**

- obtaining prospects for listing
- engaging clients
- negotiating and executing management agreements
- managing property and other facilities
- providing support within the agency
- dealing with owners' corporations and tenants
- planning and managing meetings
- contractor management
- promoting, advertising, and undertaking administrative duties of the agency
- undertaking routine functions within the agency
- records management
- receiving and handling of monies

**Factors may relate to:**

- competing work demands
- technology/equipment breakdowns
- health and safety issues
- environmental factors such as time, weather
- resource issues
- changes to procedures

**Standard documentation  
may include:**

- organisational, industry and other contracts
- titles
- property marketing, sale and lease agreements/contracts
- tenancy agreements
- permits
- building codes
- licences
- specifications
- plans
- maps

**Business  
equipment/technology may  
include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Risks may relate to:**

- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- suppliers and contractors
- changes to regulations and legislation
- time constraints
- emergencies and disasters

**Risks may be identified  
through:**

- regular informal and informal consultations/ meetings with colleagues
- regular housekeeping activities
- ongoing training
- audits and review of audit reports
- workplace inspections in area of responsibility
- checking work area and/or equipment before and during work
- review of OHS records, including registers of hazardous substances, dangerous goods, and so on

**Limitations may relate to:**

- job role and responsibilities
- quality processes
- own competency level
- industry requirements
- own understanding of risk identification processes
- own interpretation of legislation, regulations and procedures
- complying with OHS requirements
- legal responsibilities

**Professional development strategies may include:**

- formal/informal learning programs
- work rotation to facilitate changing work priorities
- utilisation of existing strengths to focus future career development
- involvement in community/industry activities
- coaching, mentoring and/or supervision
- updating/maintaining knowledge base on current issues for work/professional practice
- identifying and establishing new career paths

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Competency standards and other relevant benchmarks may relate to:**

- personal and technical knowledge, skills and attitudinal aspects (competencies) required to effectively and efficiently undertake the day-to-day tasks and duties of the work function and specifically:
  - competency standards for the property industry
  - other relevant industry, cross-industry and enterprise competency standards
- other benchmarks such as:
  - industry codes of practice/conduct and code of ethics
  - statutory and legislative requirements in terms of working in the property sector

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately interpreting and complying with relevant legislative, ethical and procedural requirements and confirming own understanding and application with relevant people including:
  - maintenance of confidentiality
  - accurate determination and clarification of owners corporation expectations
  - adequate disclosure of relevant information including management fees
  - acting in principal's best interests
  - ethical representation of organisation and clients
  - identification and disclosure of conflicts of interest
  - declaration of any beneficial interests
  - fair and honest provision of property services
  - non-discriminatory practices
  - over servicing, fixed charges rather than fee for service
- effectively identifying, scheduling and carrying out work tasks in a way that demonstrates compliance with legislative, ethical and procedural requirements, and identifying and reporting factors which impede the achievement of scheduled tasks
- completing standard documentation using business equipment/technology, ensuring adherence to legislative and procedural requirements, and securely maintaining documentation
- identifying a range of potential risks through consultation with relevant people, and demonstrating appropriate practices for handling monies and securing property and facilities
- using feedback and industry competency standards and benchmarks to accurately identify and implement opportunities for developing and maintaining own professional development

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, social and ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- relevant Commonwealth/State/Territory consumer protection and trade practices legislation with regard to property transactions
- relevant legislation that affects management of property, especially residential property
- relevant Acts and regulations
- risk factors relating to workplace practices
- fundamental knowledge of handling trust monies and office processes
- limitations of work role, responsibility and professional abilities

**Required skills and attributes include:**

- self evaluation skills to:
  - systematically evaluate own work practices to identify ways to improve performance or understanding
- organisational skills to:
  - create a personal professional development plan
  - prioritise any personal development needs
  - schedule and manage meetings
- communication skills to:
  - interpret and understand client needs
  - interpret and understand legal, ethical and procedural requirements
  - identify and complete appropriate documentation
  - read and understand a variety of information relating to strata/community management services
  - follow trust account procedures
- reflection skills to:
  - differentiate between professional and personal values
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - respect individual differences

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting and complying with legislative, ethical and procedural requirements, to completing standard documentation and implementing professional development strategies
- evidence must include documentation showing how legislative and procedural requirements were interpreted and applied, areas of potential risk, and how feedback was obtained and used to plan own continuous professional development

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



**PRDPOD401A****Unit Descriptor****Monitor a safe workplace**

This competency standard specifies the outcomes required to follow and promote occupational health and safety (OHS) policies and procedures to ensure own safety and that of others in the workplace. It requires the ability to identify and control workplace risks and hazards and communicate workplace safety requirements.

This unit is based on Generic Competency B in the National Guidelines for Integrating Occupational Health and Safety Competencies into National Industry Competency Standards.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Provide information on safety policy and procedures in the workplace | <ul style="list-style-type: none"> <li>1.1 Relevant provisions of <i>OHS legislation</i> and codes of practice are accurately and clearly explained to team members</li> <li>1.2 Documentation is developed and maintained to support implementation of <i>OHS policies and procedures</i></li> <li>1.3 Recommendations are made to improve effectiveness of OHS and workplace policies and procedures</li> </ul>  |
| 2. Implement and monitor participative arrangements                     | <ul style="list-style-type: none"> <li>2.1 <i>Consultative processes</i> are implemented and monitored to ensure all team members have an opportunity to contribute to the management of OHS in the workplace</li> <li>2.2 Health and safety issues raised through consultation are resolved promptly or referred to <i>relevant people</i> for resolution in accordance with <i>organisational requirements</i></li> <li>2.3 Outcomes of consultation over OHS issues are promptly reported to team members in accordance with organisational procedures</li> </ul>   |
| 3. Implement and monitor hazard and risk control procedures             | <ul style="list-style-type: none"> <li>3.1 Existing and potential <i>risks and hazards</i> in work area are identified and appropriate actions implemented in accordance with OHS policies and procedures</li> <li>3.2 Individual and team adherence to control risks and hazards in work area is maintained and monitored in accordance with organisational requirements</li> <li>3.3 Inadequacies in existing <i>procedures to control risks</i> are identified and appropriate actions implemented in accordance with organisational requirements</li> <li>3.4 Cause of any <i>hazardous events</i> is investigated in accordance with legislative requirements and organisational policies and procedures</li> <li>3.5 <i>Measures to prevent recurrence and minimise risk</i> of hazardous events are implemented based on hierarchy of control and own role</li> </ul> |

4. Support OHS training
- 4.1 OHS *training needs* of individuals and teams are identified and discussed with relevant people in accordance with organisational policies and procedures
  - 4.2 Arrangements are made for addressing identified OHS training needs in consultation with relevant people in accordance with organisational policies and procedures
  - 4.3 Coaching and mentoring assistance is provided to team members to support the effective development of personal OHS competencies

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing and verifying workplace safety procedures with colleagues to ensure knowledge of and compliance with OHS requirements	3
Collecting analysing and organising information	carrying out safety inspections to identify inadequacies in risk control procedures	3
Planning and organising activities	monitoring work areas prior to and during work activities to ensure that risks and hazards are minimised	2
Working with others and in teams	providing coaching and mentoring support to team members	2
Using mathematical ideas and techniques	measuring and scheduling tasks	1
Solving problems	identifying hazardous workplace situations and reporting required actions	2
Using technology	communicating, accessing, organising and recording information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **OHS legislation may include:**

- relevant Commonwealth/State/Territory legislation with regard to:
  - general duty of care
  - common law
  - provisions relating to roles and responsibilities of OHS representatives and/or committees
  - issue resolution
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- maintenance and confidentiality of records of occupational injury and disease
- requirements of provision of OHS information and training

### **OHS policies and procedures may relate to:**

- hazard and risk identification and reporting
- risk assessment and control measures
- incident/accident investigation
- OHS audits and safety inspections
- consultative arrangements for employees
- safe operating procedures/instructions
- use and maintenance of personal protective clothing and equipment
- emergency and evacuation procedures
- equipment maintenance and use
- use and storage of hazardous substances
- transport and storage of dangerous goods
- on-site contractors, visitors and members of the public
- first aid

### **Consultative processes may include:**

- formal and informal meetings
- OHS committees
- other committees, for example, consultative, planning and purchasing
- health and safety representatives
- suggestions, requests and concerns put forward by employees to management

### **Relevant people may include:**

- supervisors
- colleagues
- clients
- emergency personnel
- designated OHS representative

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Risks and hazards may be:**

- ergonomic
- environmental
- mechanical, electrical
- loose objects and fixtures
- hazardous materials
- obstructions

**Risks and hazards may be identified through:**

- regular informal and informal consultations/meetings with colleagues
- regular housekeeping activities
- ongoing training
- audits and review of audit reports
- workplace inspections in area of responsibility
- checking work area and/or equipment before and during work
- review of OHS records, including registers of hazardous substances, dangerous goods, and so on

**Procedures for controlling risks may include:**

- hazard, accident and incident reporting procedures
- following safe operating procedures
- emergency, fire and accident procedures
- compliance with ergonomic and environmental requirements
- safe lifting and manual handling procedures
- regular OHS consultations
- correct selection, use, storage and maintenance procedures for personal protective clothing and equipment

**Hazardous events may include:**

- accidents
- fires and explosions
- emergencies such as chemical spills
- bomb scares
- violent incidents

**Measures for minimising risk may include:**

- measures to remove the cause of a risk at its source
- application of the hierarchy of control:
  - elimination of the risk
  - engineering controls
  - administrative controls
  - personal protective equipment
- consultation with workers and their representatives

**Training needs may include:**

- coaching, mentoring and/or supervision
- formal/informal learning programs
- internal/external training provision
- work experience, exchange opportunities
- personal study
- seminars, conferences
- quality assurance assessments and recommendations
- Recognition of Prior Learning

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- complying with a range of health and safety legislative and organisational procedures
- identifying and addressing OHS training needs of team members
- assessing and controlling risks in accordance with the hierarchy of control
- providing clear and accurate information and advice to team members on workplace hazards and risks

**Required knowledge and understanding includes but is not limited to:**

- techniques to control risks (hierarchy of control)
- range of workplace hazards and associated risks that exist in the workplace and their control measures
- relevant legislation that affects business operation, especially in regard to OHS
- organisational policies and procedures relating to hazard management, fire, emergency, evacuation, incident (accident) investigating and reporting
- characteristics and composition of the work team
- consultative processes for improving workplace OHS culture
- organisational communication channels and procedures
- legal responsibilities of employers, supervisors and employees in the workplace

**Required skills and attributes include:**

- analytical skills to:
  - identify potential or existing risks and hazards in the workplace
  - assess resources required to apply risk control measures
  - determine OHS training requirements of the work team
- communication skills to:
  - accurately follow and give written and verbal instructions
  - report details of incidents in the work area
  - clearly explain information on OHS issues
- problem solving skills to:
  - identify inadequacies in risk control measures
  - determine when intervention to control risks is necessary
- coaching and mentoring skills to:
  - provide support to colleagues
- application skills to:
  - follow safe operating practices and procedures when using tools and equipment
  - comply with ergonomic and environmental protection requirements
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- a suitable work area for identification of hazards and control measures
- personal protective equipment
- health and safety policies and procedures
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from explaining OHS legislation and codes of practice to work teams to identifying OHS training needs of individuals and work teams and providing coaching and mentoring assistance
- evidence must include documentation of OHS issues explained to colleagues, information on hazard and risk identification, suggestions for improvements to OHS policies and procedures, training needs analysis

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD402A****Plan and coordinate property and facility inspection****Unit Descriptor**

This competency standard specifies the outcomes required to plan and coordinate a property/facility inspection to evaluate the condition, worth and redevelopment requirements of the property/facility. It requires the ability to effectively plan and document work activities, monitor and conduct inspection tasks and record and report the results of the inspection.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Plan property/facility inspection    | <ul style="list-style-type: none"> <li>1.1 Research and analysis is conducted of relevant <i>property/facility information</i> to determine <i>status</i> and occupancy details</li> <li>1.2 Context and <i>purpose of inspection</i> is determined in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.3 Property/facility inspection plan is developed which details a range of suitable inspection activities and timelines that accurately reflect client and organisational requirements</li> <li>1.4 Property/facility inspection plan is sufficiently flexible and adaptable to accommodate any unforeseen <i>contingencies</i> that may arise</li> <li>1.5 <i>Business equipment/technology</i> is used to access, organise and monitor information in accordance with applicable occupational health and safety (OHS) and organisational requirements</li> <li>1.6 Property/facility access arrangements and approvals to conduct inspection are negotiated with relevant people in accordance with <i>legislative requirements</i> and organisational procedures</li> </ul> |
| 2. Conduct property/facility inspection | <ul style="list-style-type: none"> <li>2.1 Property/facility is inspected in accordance with inspection plan ensuring all relevant aspects of the property/facility are sighted and noted</li> <li>2.2 <i>Variations</i> to inspection plan are determined and implemented to meet changing circumstances to enable improved service delivery</li> <li>2.3 <i>Inspection processes</i> are reliable and make efficient use of available time and resources in accordance with organisational requirements</li> <li>2.4 <i>Condition of features</i> associated with property/facility are recorded in accordance with industry and organisational requirements</li> <li>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul>   |



3. Review and report inspection outcomes
- 3.1 Inspection outcomes are reported and reviewed against aims and objectives of activities outlined in inspection plan
  - 3.2 Recommendations and issues are prepared in the required format and in a style and structure suitable for review and interpretation in accordance with organisational requirements
  - 3.3 *Feedback* on client satisfaction with inspection outcomes is sought using valid methods and verifiable data in accordance with organisational requirements
  - 3.4 Relevant documentation is completed and processed in accordance with legislative and organisational requirements
  - 3.5 All information is securely maintained with due regard to client confidentiality and in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	establishing the inspection context and purpose through consultative processes and negotiating access arrangements	2
Collecting analysing and organising information	conducting research and analysis of relevant property/facility information to develop a property/facility inspection plan	3
Planning and organising activities	planning and coordinating inspection processes	3
Working with others and in teams	seeking constructive feedback for review and future development of inspection processes	2
Using mathematical ideas and techniques	planning and scheduling tasks and measuring physical aspects of subject property/facility	1
Solving problems	adapting appropriately to variations and contingencies in the planning and inspection process	2
Using technology	scheduling tasks and preparing property/facility inspection report	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property/facility information may include information relating to:**

- land title documentation
- legal documentation
- deposited, survey and other plans
- tenancy and other contracts
- permits
- building codes
- licences
- specifications
- agreements
- land and water rates
- utilities usage
- taxation
- leasing rates
- construction costs
- occupancy rates
- operating costs
- depreciation schedules
- company services
- policy/management procedures
- current and planned property/facility/site developments
- sales information
- marketing services

**Status of property/facility may relate to:**

- legal position
- financial situation
- location by lot
- location by section number
- occupancy
- legal ownership

**Purpose of inspection may:**

- be defined through a contract between the enterprise providing the inspection service and the legal entity commissioning the service
- form part of the internal procedures of the property management organisation

**Relevant people may include:**

- tenants
- property owners
- agents
- government personnel
- supervisors
- management
- site personnel
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Clients may include:**

- property/facility owners
- property/facility agents
- tenants
- building supervisors
- managers
- project managers
- agents
- government and legal instruments/agencies

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractor
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Variations may include:**

- changes to inspection schedules
- changes to fittings and fixtures
- work outside or producing results outside the terms and conditions of contract
- alternate suppliers

**Inspection processes may relate to:**

- timeframe
- statutory limitations
- type of job
- complexity of construction
- type of construction

**Conditions may include general state of repair and condition of:**

- fittings and fixtures
- ancillary structures
- service and ground improvements to original property/facility
- observable external or internal defects or non-compliance with regulations
- evidence of pre-existing or potential issues affecting the quality of the environment
- current ownership structures
- financial claims over the property/facility
- signs of pest infestation

**Features may include:**

- modifications to original property/facility
- modifications to building approvals
- physical aspects of land and buildings
- formal and informal inclusions
- associated structures

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- OHS representatives
- supervisor
- colleagues

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from clients, supervisors, colleagues
- personal, reflective behaviour strategies
- workplace assessment

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- undertaking sufficient research of property/facility information to develop an inspection plan detailing a range of suitable inspection activities and which incorporates appropriate contingency arrangements
- conducting a property/facility inspection under normal industry conditions ensuring condition of features is recorded
- reporting inspection conclusions and recommendations including client feedback on level of satisfaction with service

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts, regulations and building codes
- basic knowledge of property/facility contracts and administrative requirements
- inspection methods for different property/facility types
- local regulations affecting use and conditions of subject property/facility
- principles of business and property law and any specific precedents likely to influence conduct of inspection
- sources of information and assistance for property/facility

**Required skills and attributes include:**

- research skills to:
  - source property/facility information
  - review client satisfaction
- organisational skills to:
  - plan and arrange property/facility inspection
  - schedule and meet timelines and client requirements
  - manage risk
- communication skills to:
  - interpret written and oral information
  - complete documentation and report findings
  - negotiate client requirements and access arrangements
- analytical skills to:
  - determine critical aspects of inspection
  - provide recommendations on future options for subject property/facility
- technical skills to:
  - schedule tasks and report outcomes
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from planning and documenting work activities, to conducting a property/facility inspection and reviewing and reporting the outcomes
- evidence must include relevant planning documentation including site inspection plans, records from at least two property/facility inspections, copies of the property/facility inspection reports and feedback on inspection processes

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



**PRDPOD403A****Analyse resource use in building operations****Unit Descriptor**

This competency standard specifies the outcomes required to analyse requirements for resources used in building operations. It covers the processes required to analyse current resource requirements and advise on future resource needs. It requires the ability to identify occupational health and safety (OHS) hazards and to apply appropriate risk management processes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Check and monitor stores                           | <p>1.1 <i>Stores</i> are monitored and checked to ensure availability of required resources in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Business equipment/technology</i> is used to routinely monitor stores in accordance with applicable OHS and organisational requirements</p> <p>1.3 Variances in supply requirements are identified and documented in accordance with organisational procedures</p> <p>1.4 Stores records are routinely updated to ensure <i>safe and effective use of materials</i> in accordance with organisational and <i>legislative requirements</i></p> <p>1.5 Advice is provided to <i>relevant people</i> on suggested improvements of stores use and inventory control</p>  |
| 2. Undertake routine building function checks         | <p>2.1 Routine building inspections are conducted in accordance with client and organisational requirements</p> <p>2.2 Inspection process includes identification of maintenance and repair requirements in accordance with applicable OHS and organisational requirements</p> <p>2.3 Maintenance and repair requirements are documented and actioned in accordance with organisational requirements</p> <p>2.4 Breaches of <i>building controls</i> are recognised and reported to authorised personnel for action in accordance with organisational requirements</p> <p>2.5 Appropriate <i>interpersonal techniques</i> are used to discuss any issues or concerns with tenants</p> <p>2.6 <i>Recommendations to improve compliance</i> with building tenancy and practice codes are prepared in accordance with organisational requirements</p> |
| 3. Monitor waste collection and disposal arrangements | <p>3.1 Sorting of waste is arranged and monitored in accordance with legislative requirements and <i>OHS procedures</i></p> <p>3.2 Arrangements for hazardous waste to be collected and stored are assessed and variations to accepted procedures discussed with relevant people</p> <p>3.3 Risks to health and safety of self and others are identified and relevant people immediately notified in accordance with established <i>safety and security requirements</i></p> <p>3.4 Waste storage and disposal procedures are checked and monitored to ensure risk to others and own health and safety is minimised</p>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	documenting safe handling of waste products and hazardous materials	2
Collecting analysing and organising information	using stores records to identify additional resource requirements sighting and noting variations in compliance during building function checks	3
Planning and organising activities	coordinating waste storage and disposal	3
Working with others and in teams	seeking specialist advice as required	1
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	identifying hazards and notifying relevant people	2
Using technology	preparing building check reports and updating stores records	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Stores may include:**

- chemical items
- mechanical items
- tools and equipment

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- ethical standards, codes of practice
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Safe and effective use of materials may be influenced by:**

- effective storage procedures
- minimisation of waste
- correct labelling of products
- shelf-life checks
- warning signs
- use of personal protective clothing and equipment
- OHS policy and procedures
- staff roles and responsibilities

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices laws and guidelines
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- consumer protection
- public health
- freedom of information
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Relevant people may include:**

- supervisors
- colleagues
- clients
- maintenance staff
- emergency personnel
- OHS committee
- external suppliers

**Building controls may include:**

- access procedures
- exit procedures
- alarms
- fire equipment

**Interpersonal techniques may relate to:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Recommendations to improve compliance may include, but are not limited to:**

- regular inspections of resources and work areas
- continuous monitoring of equipment operation and work areas prior to and during work activities
- regular informal and formal consultations/meetings with colleagues
- regular housekeeping activities
- warden training
- review of health and safety records
- hazard reports
- hazardous substances
- dangerous goods registers

**OHS procedures may relate to:**

- hazard and risk identification and reporting
- risk assessment and control measures
- safe operating procedures/instructions
- use and maintenance of personal protective clothing and equipment
- equipment maintenance and use
- use and storage of hazardous substances
- transport and storage of dangerous goods
- on site contractors, visitors and members of public

**Safety and security requirements may be satisfied through:**

- adherence to OHS policies and procedures for the containment of:
  - potential safety and health hazards such as physical, mechanical or chemical agents which are already in the work environment, or are brought to the environment, or created as a by-product of work done on the site
  - emergency situations including fire, flood, bomb threats, or other actions likely to lead to bodily harm

## **EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining available and future resources by applying and effective inventory control methods and procedures
- monitoring stores for compliance with safety legislation by maintaining and updating inventory records
- carrying out building functional checks and identifying and addressing breaches of building controls
- arranging and monitoring waste storage and disposal methods and procedures

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- building control legislation
- building codes and relevant Australian Standards
- basic knowledge of property contracts and administrative requirements
- common hazards to public and personal safety
- points of contact with emergency service agencies
- organisational and professional procedures, ethical practices and business standards

**Required skills and attributes include:**

- literacy skills to:
  - read and understand technical information related to hazardous materials
  - complete documentation and report findings
  - maintain resource inventory records
- organisational skills to:
  - plan and arrange removal of waste
  - manage risk
- communication skills to:
  - interpret written and oral information
  - negotiate client/tenant requirements and access arrangements
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes
- problem solving skills to:
  - manage hazards and apply risk management procedures

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from monitoring stores and resource requirements, undertaking building function checks to monitoring waste collection and disposal arrangements
- evidence must include records of stores, listing of resource requirements and variations, documentation outlining safe use of materials, building function reports and subsequent recommendations, documentation relating to hazard identification and improvements made to waste storage and disposal procedures

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD404A****Unit Descriptor****Analyse risks and opportunities**

This competency standard specifies the outcomes required to identify and analyse potential threats and opportunities to ensure safe and effective property operations. It requires the ability to assess property systems and assets to determine the level of risk exposure and to identify areas of opportunity.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                     |  |
|-------------------------------------|--|
| 1. Identify risks and opportunities | <p>1.1 <i>Information</i> on actual and potential <i>risks and opportunities</i> is collected and assessed for currency, accuracy and relevance in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Terms of reference</i> are determined in consultation with <i>relevant people</i> and information is updated, modified and maintained in accordance with organisational requirements</p> <p>1.3 <i>A structured plan</i> for identifying and assessing <i>risk/opportunity likelihood</i> is developed in accordance with terms of reference and agreed timeframes</p> <p>1.4 <i>Limitations</i> in identifying and assessing risks/opportunities are recognised and assistance sought as required</p> |
| 2. Analyse risks and opportunities  | <p>2.1 Identified risks/opportunities are promptly <i>analysed</i> for validity and reliability in accordance with organisational requirements</p> <p>2.2 <i>Assessment criteria</i> for measuring level of potential or existing risk/opportunity, together with an assessment of consequences is developed in accordance with terms of reference</p> <p>2.3 Any gaps in the assessment methodology are identified and appropriate actions implemented in accordance with organisational procedures</p> <p>2.4 Data is valid and relevant and analysed against assessment criteria to determine level of potential risk/opportunity in accordance with organisational procedures</p>                                      |
| 3. Document findings                | <p>3.1 <i>Risk/opportunity assessment findings</i> are documented and distributed to relevant people in accordance with organisational requirements</p> <p>3.2 <i>Feedback</i> on findings is actively sought to ensure accuracy and relevance of information</p> <p>3.3 Findings are updated as required and incorporated into risk/opportunity assessment plan for future management decision making</p> <p>3.4 All information is securely maintained with due regard to confidentiality, organisational and <i>legislative requirements</i></p>  |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	conducting consultative processes for an accurate understanding of the operating environment	3
Collecting analysing and organising information	gathering information from reliable sources to assess potential or existing risks and opportunities	3
Planning and organising activities	developing assessment criteria to use as a basis for measuring the level of risk/opportunity	2
Working with others and in teams	seeking constructive feedback on risk/opportunity findings to verify accuracy and relevance of information	1
Using mathematical ideas and techniques	analysing financial data	2
Solving problems	recognising personal limitations in identifying and assessing risks and opportunities, and seeking appropriate assistance as required	2
Using technology	sourcing, organising, recording and presenting information in suitable formats	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Information may relate to:

- insurance
- agency listing records
- property management reports
- owner surveys
- operating environment of organisation (financial markets, competitors, core business activities, functions, stakeholders)
- lines of responsibility
- key personnel
- reports and relevant documentation
- historical data

**Risks may relate to:**

- deliberate, natural, accidental, perceived
- loss, disclosure, destruction or compromise of asset
- loss of goodwill, reputation or credibility
- public liability
- industry special risks
- machinery malfunction
- loss of profits
- trade practices issues
- occupational health and safety (OHS)

**Opportunities may relate to:**

- creating something new
- altering existing property/facility
- changing style of investment
- aggregation of assets
- adding value
- change in use, ownership, appearance, perception of property/facility
- use of bankers and financiers

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Terms of reference may relate to:**

- operational environment
- roles and responsibilities
- security and other clearances
- limitations and exclusions
- scale of the task/assessment (whether a full-scale operation, or limited to a particular section or operation of the company)
- client expectations
- costs
- agreed timeframes

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- internal/external auditors
- industry professionals and associations

**A structured plan may be constructed by using:**

- checklists
- structured tables
- structured questionnaires
- interview question sheets
- structured planning software
- spreadsheets, word-processing and other software

**Risk/opportunity likelihood may be:**

- low
- medium
- high

**Limitations may relate to:**

- job role and responsibilities
- quality processes
- own competency level
- industry requirements
- own understanding of risk identification processes
- complying with OHS requirements
- legal responsibilities

**Analysis may be:**

- quantitative and/or qualitative
- explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Assessment criteria may be based on:**

- qualitative and/or quantitative factors
- semi-quantitative factors
- organisational or client requirements
- Australian Risk Management Standards

**Risk/opportunity assessment findings may include:**

- tables and information from approved data collection tools
- graphical representations of data
- suggestions
- summary of assessment outcomes

**Feedback may be sought from:**

- questionnaires
- documentation and reports
- quality assurance data
- regular meetings
- comments from supervisors and/or colleagues

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- obtaining information from a range of sources and consultative processes to ensure an accurate understanding of the operating environment
- establishing terms of reference, and developing an effective action plan and structure for analysis and assessment
- assessing level of risk/opportunity potential against agreed assessment criteria
- reviewing and preparing risk/opportunity findings in a format suitable for presentation

**Required knowledge and understanding includes but is not limited to:**

- mechanisms to obtain and analyse feedback
- organisational goals and objectives, activities and systems
- risk/opportunity assessment techniques and processes
- insurance policies, codes and operations
- relevant legislation regarding risk, including OHS
- property operations history and precedents regarding risk to operations and areas of opportunity
- concept of litigation
- client and organisational confidentiality requirements
- relevant industry codes of practice and standards
- principles and techniques of identifying and measuring risks/opportunities

**Required skills and attributes include:**

- communication skills to:
  - use interviewing and questioning techniques to obtain information
  - source and collate feedback
- technical skills to:
  - complete risk assessment plans
- organisational skills to:
  - plan timelines and reporting mechanisms
  - record and file information
- observation skills to:
  - accurately identify existing or potential risks/opportunities
- problem solving skills to:
  - apply reasoning and logical analysis to measure risk consequence
  - recommend countermeasures or contingency plans
- research skills to:
  - analyse and interpret information
  - form recommendations
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from analysing risks and opportunities to reporting findings
- evidence must include a plan to assess risks, terms of reference, documentation showing how risks were analysed, assessment criteria used to measure risks and opportunities, report outlining risk assessment

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD405A****Implement customer service strategies****Unit Descriptor**

This competency standard specifies the outcomes required to provide advice to customers and evaluate customer service. It requires the ability to obtain and analyse client feedback and design strategies for future improvement to customer service strategies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Advise on customer needs                              | <p>1.1 <i>Customer needs</i> are accurately assessed and clarified using appropriate <i>communication techniques</i></p> <p>1.2 Problems matching service delivery to customer needs are diagnosed and options for improved service are developed within <i>organisational requirements</i></p> <p>1.3 Advice is relevant, constructive and promotes the improvement of customer service delivery</p> <p>1.4 <i>Business equipment/technology</i> is used to structure and present information on customer service needs in accordance with applicable OHS and organisational requirements</p>                      |
| 2. Support implementation of customer service strategies | <p>2.1 Customer service strategies and opportunities are promoted to <i>relevant people</i> in accordance with organisational and <i>legislative requirements</i></p> <p>2.2 Available resources are identified and allocated to fulfil customer service objectives in accordance with organisational requirements</p> <p>2.3 <i>Procedures to resolve customer difficulties</i> and complaints are actioned promptly in accordance with organisational procedures</p> <p>2.4 <i>Coaching and mentoring assistance</i> is provided to colleagues to overcome difficulties in meeting customer service standards</p> |
| 3. Evaluate and report on customer service               | <p>3.1 Client satisfaction with service delivery is reviewed using verifiable data in accordance with organisational requirements</p> <p>3.2 Changes necessary to maintain service standards are identified and actions implemented in accordance with organisational procedures</p> <p>3.3 Conclusions and recommendations are prepared from verifiable data and provide constructive advice on future directions of customer service strategies</p> <p>3.4 Systems, records and reporting procedures are maintained to compare changes in customer satisfaction</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and discussing own understanding of customer expectations and requirements with colleagues, supervisor and/or customers	3
Collecting analysing and organising information	obtaining and complying with legislative information relevant to service delivery	2
Planning and organising activities	prioritising work tasks to meet customer requirements	2
Working with others and in teams	obtaining/providing assistance among team members to fulfil customer requirements and organisational requirements	2
Using mathematical ideas and techniques	measuring customer satisfaction	1
Solving problems	identifying and resolving customer complaints or to recognise own limitations and service delivery complications	2
Using technology	accessing customer service information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Customers may include but are not limited to:**

- customers with routine or special requests
- internal or external customers
- other agencies
- individual members of the organisation
- corporate customers
- members of the public
- regular or new customers
- people from a range of social, cultural or ethnic backgrounds



**Customer needs and expectations may relate to:**

- advice or general information about leasing
- company information on services
- specific information
- making an appointment
- property operations and policy/management procedures
- accuracy of information
- current and planned property developments
- sales and marketing services
- contract administration

**Communication techniques may include but are not limited to:**

- active listening
- using open and/or closed questions
- speaking clearly and concisely
- using appropriate language and tone of voice
- maintaining eye contact (for face-to-face interactions)
- non-verbal communication (eg body language and personal presentation for face-to-face interactions)
- clear, legible writing

**Organisational requirements may be outlined and reflected in:**

- marketing guidelines
- business and performance plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Relevant people may include:**

- supervisor
- customers
- colleagues
- external organisations
- committees

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Procedures to resolve customer difficulties may include:**

- using conflict management techniques
- refund of monies
- providing replacements
- referrals to supervisor
- review of products or services
- external agencies (eg Ombudsman)

**Coaching and mentoring assistance may include:**

- providing feedback to another team member
- fair and ethical practice
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying and confirming the needs, priorities and expectations of the organisation and owner in delivering services to customers
- demonstrating appropriate customer relations behaviour and designing strategies to improve delivery of services
- distinguishing between different levels of customer satisfaction
- providing constructive advice on customer service practices
- responding to and reporting on customer complaints and feedback

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- principles of customer services
- organisational business structure, products and services
- organisational policy and procedures for customer service including handling customer complaints
- product and service standards and best practice models
- common problems relating to customer service
- consultation methods, techniques and protocols
- techniques for dealing with customers with special needs

**Required skills and attributes include:**

- language skills to:
  - allow for adequate communication with the customer
- literacy skills to:
  - interpret customer feedback
  - respond to customer complaints
- numeracy skills to:
  - interpret customer requirements and meet their needs
  - analyse customer service data
- problem solving skills to:
  - identify alternative services that will better match customer needs
- evaluation skills to:
  - assess effectiveness of customer service strategies
- technology skills to:
  - prepare and present information to customers
  - organise customer service data
  - prepare reports on improvements to customer service strategies
- application skills to:
  - apply relevant agreements, codes of practice or other legislative requirements to work processes
- interpersonal skills to:
  - develop a rapport with customers
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations
- personnel requirements

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting client needs and providing advice to recommending improvements to customer service strategies
- evidence must include documentation showing communication with customers, advice on improving customer service strategies, information which was presented to customer, feedback from customers

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD406A****Coordinate maintenance and repair of properties and facilities****Unit Descriptor**

This competency standard specifies the outcomes required to plan and coordinate the repair, maintenance and modification of properties and facilities. It requires the ability to effectively plan and document work activities, coordinate and monitor sub-contractors, and check and report the results of work performed.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Plan repair/maintenance operation       | <ul style="list-style-type: none"> <li>1.1 <i>Maintenance/repair</i> requirements are reviewed and confirmed with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 Repair/maintenance resource requirements are determined and arranged in accordance with <i>work order</i> and budgetary requirements</li> <li>1.3 <i>Site access and specific site requirements</i> are identified and appropriate arrangements made in accordance with <i>client, legislative and organisational requirements</i></li> <li>1.4 Work order is prepared and <i>contingencies</i> planned to ensure client and organisational requirements are met in an efficient and effective manner</li> <li>1.5 Client/tenant <i>safety and security requirements</i> are recognised and satisfied in the provision of services</li> <li>1.6 <i>Communication channels</i> and processes are established and verified with relevant people in accordance with organisational requirements</li> </ul> |
| 2. Coordinate repair/maintenance operation | <ul style="list-style-type: none"> <li>2.1 Repair/maintenance operation is monitored against work schedules to ensure completion occurs within designated timeframes</li> <li>2.2 Factors affecting the achievement of scheduled work are promptly identified and required <i>variations</i> to schedules are negotiated and agreed with relevant people</li> <li>2.3 Established communication channels and processes are used to ensure an accurate exchange of information throughout operation</li> <li>2.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul>  |

3. Check and record completed operation
- 3.1 Notification of completed repair/maintenance is received and checked against client and organisational requirements
  - 3.2 Inspection is arranged to confirm repair/maintenance is fully operational and meets performance specifications and industry standards
  - 3.3 Faults, errors or omissions are verified and prompt remedial action is determined and arranged with relevant people in accordance with organisational requirements
  - 3.4 *Business equipment/technology* is used to maintain relevant *documentation* in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	resolving conflict, negotiating maintenance and repair arrangements	2
Collecting analysing and organising information	researching site and resource needs and checking work performed against work order	2
Planning and organising activities	planning and developing work order and coordinating maintenance/repair processes	3
Working with others and in teams	collaborating with relevant people to coordinate maintenance and repair arrangements and seeking specialist advice as required	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	providing appropriate maintenance and repair services to ensure client/tenant safety and security requirements are met	2
Using technology	scheduling tasks and preparing reports	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Maintenance/repair may relate to:**

- inspections, lubrication, cleaning and adjustments
- routine repairs
- identification and replacement of worn parts
- confirmation of operational effectiveness
- changing user codes
- back-ups

**Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- tenants
- property owners
- agents
- government personnel
- supervisors
- site personnel
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Work order information may relate to:**

- work schedules
- completion dates
- job requirements and tasks
- warranties and service information



**Site access and specific site requirements may include:**

- access and egress points
- time of access
- access codes
- keys, passes, security clearance
- union requirements
- OHS requirements
- building codes and regulations
- heritage listings
- noise control

**Clients may include:**

- property owners
- property agents
- tenants
- building supervisors
- project managers
- agents
- government and legal instruments/agencies

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- privacy laws applying to owners/contractors/tenants
- trade practices laws and guidelines
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractor
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Safety and security requirements may be satisfied through:**

- adherence to OHS policies and procedures for the containment of:
  - potential safety and health hazards such as physical, mechanical or chemical agents which are already in the work environment, or are brought to the environment, or created as a by-product of work done on the site
  - emergency situations including fire, flood, bomb threats, suicide attempts or other actions likely to lead to bodily threat or fire

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Variations may include:**

- changes to work schedules
- work outside or producing results outside the terms and conditions of contract
- alternate suppliers

**Specialist advice may be sought from:**

- supervisors
- colleagues
- property specialists including architects, surveyors, valuers, planners, engineers, property managers, real estate agents
- lawyers
- builders
- sub-contractors
- government officials
- industry professionals and associations
- OHS representatives
- emergency personnel

**Business equipment/technology may include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Documentation may include:**

- work log
- service/maintenance records
- equipment/system problems/faults
- warranty conditions and allowances
- recommendations for repairs
- operational checks and maintenance conducted
- testing and commissioning results
- parts and components replaced, materials used
- costings, receipts, invoices

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- planning maintenance/repair work ensuring client/tenant safety and security and resource requirements are in accordance with budgetary parameters
- monitoring maintenance/repair work ensuring effective communication exchange and identification of factors requiring variations to work schedules
- inspecting completed work against work order and ensuring remedial action for any faults, errors or omissions
- responding appropriately to requests for maintenance/repair work and maintaining adequate records and reports

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building construction practice
- basic knowledge of property contracts and administrative requirements
- common hazards to public and personal safety associated with particular types of maintenance work in buildings
- occupancy rates and special conditions to be considered with particular services provided to tenants
- sources of information and assistance for property assets
- points of contact with emergency service agencies

**Required skills and attributes include:**

- research skills to:
  - source site and resource requirements
- organisational skills to:
  - plan and arrange maintenance/repair work
  - schedule and meet timelines and client requirements
  - manage risk
  - maintain assets
- communication skills to:
  - interpret written and oral information
  - complete documentation and report findings
  - negotiate client/tenant requirements and access arrangements
- interpersonal skills to:
  - negotiate maintenance/repair process
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes
- problem solving skills to:
  - manage maintenance/repair problems

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from planning and coordinating maintenance/repair activities, to inspecting work performed
- evidence must include relevant documentation of at least three service contracts including liaison between parties concerned with repair/maintenance and work orders, and reports of completed and checked work

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD407A****Unit Descriptor****Analyse property and facility information**

This competency standard specifies the outcomes required to collect and analyse property and facility information. It requires the ability to obtain information from a variety of sources, review information and use research and analysis techniques to enable recommendations to be made.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                  |  |
|----------------------------------|--|
| 1. Organise property information | <p>1.1 <i>Property information</i> requirements are accurately identified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Sources of property information</i> relevant to identified requirements are accessed in accordance with organisational and <i>legislative requirements</i></p> <p>1.3 Methods of organising property information are reliable and make efficient use of <i>business equipment/technology</i> and available time and resources</p> <p>1.4 Appropriate <i>interpersonal techniques</i> are used to obtain additional property information in accordance with organisational and legislative requirements</p> |
| 2. Analyse property information  | <p>2.1 Property information is promptly analysed for validity and reliability in accordance with organisational procedures</p> <p>2.2 Reliable and valid data <i>analysis</i> methods are applied to identify facts, issues, patterns, interrelationships and trends</p> <p>2.3 Assumptions used in analyses are clear, justified and consistent with evaluation objectives</p> <p>2.4 Conclusions are supported by evidence and contribute to achievement of client and organisational objectives</p> <p>2.5 Limitations in analysing property information are identified and <i>specialist advice</i> sought as required</p>   |
| 3. Present findings              | <p>3.1 Outcomes of analysis are presented in an <i>appropriate format</i>, style and structure using clear and concise language</p> <p>3.2 Analysis findings are reported and distributed to relevant people in accordance with organisational requirements</p> <p>3.3 <i>Feedback</i> and comments on suitability and sufficiency of findings is obtained and reviewed for improved future analysis processes</p> <p>3.4 All property information is securely maintained with due regard to client confidentiality in accordance with legislative and organisational requirements</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	confirming property information and data requirements with clients and colleagues	2
Collecting analysing and organising information	using established processes to source, collate and assess information	3
Planning and organising activities	developing a plan or timetable for gathering property information	2
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and receive feedback	2
Using mathematical ideas and techniques	analysing statistical data	2
Solving problems	applying different analysis techniques to suit a range of data	2
Using technology	sourcing, collating and formatting property data	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property information may include information relating to:**

- leasing rates
- construction costs
- occupancy rates
- operating costs
- depreciation schedules
- purchasing information
- inventories
- company services
- policy/management procedures
- current and planned property/site developments
- sales information
- marketing services

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Sources of property information may include:**

- property reports
- qualitative and/or quantitative data
- newspapers and journals
- policy statements
- local, State and Commonwealth government documents and registers
- internet, intranet
- television, radio

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements



**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Interpersonal techniques may relate to:**

- consultation methods
- seeking feedback
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences

**Analysis may be:**

- quantitative and/or qualitative
- explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Specialist advice may be sought from:**

- colleagues
- supervisor
- client
- valuers
- architects
- planners
- bankers and financiers
- solicitors
- real estate agents
- government officials
- industry professionals and associations

**Appropriate format of information may include:**

- using company logo/letterhead
- columns
- using tables and charts
- using a particular software application
- incorporating graphics and pictures
- using standardised forms
- alignment on page
- headers/footers

**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- obtaining information from a range of sources
- reviewing and preparing findings in a format suitable for presentation
- using appropriate data analysis techniques
- identifying any gaps in information and obtaining feedback
- using appropriate software to sort and analyse data

**Required knowledge and understanding includes but is not limited to:**

- methods of analysis
- security procedures and safe record keeping practices
- organisational policies and procedures
- types of data collection and management systems
- internal and external sources of property information and data
- client and organisational confidentiality policies
- software applications which can be used to analyse data
- principles of effective communication
- relevant legislation and statutory requirements

**Required skills and attributes include:**

- technology skills to:
  - use software packages to organise and analyse data
  - prepare reports
- literacy skills to:
  - assess information for relevance and accuracy
  - proofread and check for accuracy of information
  - prepare and present information in a suitable format
- organisational skills to:
  - maintain records and databases
  - prioritise information requests
  - use organisational filing systems
- problem solving skills to:
  - deal with information which is contradictory, ambiguous, inconsistent or inadequate
- analytical skills to:
  - analyse and interpret information
  - apply basic statistical methods and techniques
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - liaise with relevant people to obtain property information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from organising information to analysing data and reporting findings
- evidence must include at least two types of property data which have been obtained, listing of sources of data regularly accessed, evidence of information which has been analysed, a report presenting property data

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD408A****Unit Descriptor****Provide leadership in the property industry**

This competency standard specifies the outcomes required to provide effective leadership in the property industry. It requires the ability to model high standards of performance and behaviour, and positively influence individuals and work teams. It requires a knowledge of applicable financial, legal and procedural requirements relevant to the property industry.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Model high standards of performance  | <p>1.1 Own work practices model high standards of performance and/or ethics in providing property <i>services</i> in accordance with <i>organisational, legislative, financial and procedural requirements</i></p> <p>1.2 Property services and work practices are planned and implemented in accordance with client and organisational values and requirements</p> <p>1.3 All work reflects an understanding and respect of individual differences and work practices are adapted as appropriate to meet <i>specific needs</i> of <i>relevant people</i></p> <p>1.4 Individual/team efforts and contributions are encouraged, valued and rewarded in accordance with organisational requirements</p> <p>1.5 Breaches of organisational <i>codes of ethics and/or practices</i> are recognised and reported in accordance with organisational and industry standards and procedures</p> |
| 2. Interpret and comply with financial, legislative and procedural requirements | <p>2.1 Financial, legislative and procedural requirements relevant to property services are identified and accessed in accordance with organisational requirements</p> <p>2.2 Key financial, legislative and procedural principles relating to organisational values and requirements are identified and interpreted</p> <p>2.3 <i>Information</i> relevant to property services is identified and assessed in accordance with organisational requirements</p> <p>2.4 Own interpretation and application of financial, legislative and procedural requirements is confirmed with relevant people to ensure consistency</p> <p>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational procedures</p>   |

3. Facilitate commitment to workplace change
  - 3.1 Opinions and suggestions on improving work practices are encouraged to facilitate participation in change processes
  - 3.2 Goals and objectives of *change* are communicated clearly and promptly to individuals and teams
  - 3.3 *Business equipment/technology* is used to manage and provide access to information on progress towards objectives of change
  - 3.4 *Mentoring and coaching* is provided to support individuals and groups through introduction of change
  - 3.5 Decisions to overcome problems in implementation of change are made in consultation with relevant people
  - 3.6 Effective relations and communications are maintained with clients and colleagues during process of change
  
4. Develop and maintain professional competence
  - 4.1 Own *professional development* is maintained in consultation with relevant people in accordance with organisational requirements
  - 4.2 *Feedback* from clients and colleagues is used to determine professional competency, quality of performance and identify key areas for improvement in providing property services
  - 4.3 Personal knowledge and skills in providing property services are assessed against *competency standards and other relevant benchmarks* to determine professional development needs and priorities
  - 4.4 Strategies to maintain currency of professional competency in providing effective strata/community management services are identified, planned and implemented
  - 4.5 *Professional networks* are participated in to identify and build relationships with relevant individuals and organisations in property industry to obtain and maintain personal knowledge

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting with clients and colleagues on performance and/or service provision, and on the implementation of change processes	3
Collecting analysing and organising information	evaluating own professional competence against industry benchmarks and developing learning opportunities	2
Planning and organising activities	establishing work plans and change processes	2
Working with others and in teams	seeking feedback on own performance	3
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge and identifying and resolving issues associated with change	2
Using technology	sourcing and managing information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Services may relate to:

- residential and commercial/industrial property and facilities
- property and facilities management across a range of property types
- marketing, sale and leasing of a range of property types
- property management across a range of property types
- on-site residential property management
- strata and community title management
- rural agency practice
- business broking
- buyers advocacy/agent
- urban agency practice

**Organisational requirements may be outlined and reflected in:**

- agency policies/guidelines
- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- sales, marketing and leasing/management procedure manuals
- policies and procedures in relation to client service
- access and equity principles and practice guidelines
- legal and organisational policies/guidelines
- ethical standards, codes of practice such as:
  - acting in principal's best interests
  - misrepresentation
  - over servicing, fixed charges rather than fee for service
  - declaration of beneficial interest
  - clear communication of services offered and fee for service
  - clear negotiation of fees
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative, financial and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices laws and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Clients may include:**

- potential vendors
- vendors
- prospective purchasers
- purchasers
- prospective and existing landlords
- prospective and existing tenants
- owners corporations and community title groups
- agents/third parties for purchasers and vendors
- in-house staff and office contractors
- other agency staff

**Specific needs may relate to:**

- language (verbal, non-verbal, written)
- traditional practices and observations
- beliefs, values
- food, diet
- dress
- religious and spiritual observances
- social conventions
- cultural stereotypes
- conventions of gender/sexuality

**Relevant people may include:**

- supervisors/colleagues
- clients
- legal representatives
- industry professionals and associations
- property owners
- tenants
- agents

**Codes of ethics, practice and/or conduct may relate to:**

- maintaining confidentiality
- use of organisational property
- individual behaviour
- non-discriminatory practices
- declaration of conflict of interest
- acting in principal's best interests
- misrepresentation
- over servicing, fixed charges rather than fee for service
- declaration of beneficial interest
- clear communication of services offered and fee for service
- clear negotiation of fees
- accurate determination and clarification of owners corporation expectations
- disclosure of relevant information including management fees
- representation of organisation and clients
- fair and honest provision of property services
- over servicing, fixed charges rather than fee for service



**Information may relate to:**

- organisational procedures, policies and guidelines
- financial and budgetary procedures, policies and guidelines
- insurances
- agency records
- property management reports
- client/colleague surveys
- operating environment of organisation (financial markets, competitors, core business activities, functions, stakeholders)
- reports and relevant documentation
- historical data
- taxation records
- asset registers

**Specialist advice may be sought from:**

- supervisor/colleagues
- valuers
- architects
- planners
- investment consultants
- bankers and financiers
- solicitors
- real estate agents
- technical experts
- government officials
- industry professionals and associations

**Change may relate to:**

- implementation of new work practices and/or services
- organisational restructures
- introduction of new technology
- change in work location
- new client base
- staffing changes
- job role changes
- work priorities

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Mentoring and coaching may relate to:**

- providing feedback to team members/colleagues
- fair and ethical practices
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

**Professional development strategies may include:**

- formal/informal learning programs
- work rotation to facilitate changing work priorities
- utilisation of existing strengths to focus future career development
- involvement in community/industry activities
- coaching, mentoring and/or supervision
- updating/maintaining knowledge base on current issues for work/professional practice
- identifying and establishing new career paths

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Competency standards and other relevant benchmarks may relate to:**

- personal and technical knowledge, skills and attitudinal aspects (competencies) required to effectively and efficiently undertake the day-to-day tasks and duties of the work function and specifically:
  - competency standards for the property industry
  - other relevant industry, cross-industry and enterprise competency standards
- other benchmarks such as:
  - industry codes of practice/conduct and code of ethics
  - statutory and legislative requirements in terms of working in the property industry

**Professional networks may include:**

- work teams
- suppliers
- other organisations
- committees
- internal/external customers
- government agencies
- professional/occupational associations
- project specific ad hoc consultative/reference groups
- advisory committees
- lobby groups
- local inter-agency groups
- specific interest or support groups

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- demonstrating high standards of work practices and ethics in providing property services including:
  - maintenance of confidentiality
  - accurate determination and clarification of owners corporation expectations
  - adequate disclosure of relevant information including management fees
  - acting in principal's best interests
  - ethical representation of organisation and clients
  - identification and disclosure of conflicts of interest
  - declaration of any beneficial interests
  - fair and honest provision of property services
  - non-discriminatory practices
  - over servicing, fixed charges rather than fee for service
- accurately interpreting and complying with relevant legislative, financial, procedural requirements and prescribed codes of conduct, and checking own understanding and application with relevant people
- using effective communication techniques to introduce and monitor change, while providing support to, and maintaining relationships with clients and colleagues throughout the change process
- using constructive feedback and industry competency standards and benchmarks to accurately identify and implement opportunities for developing and maintaining own professional development

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards including:
  - maintenance of confidentiality
  - owners corporation expectations
  - adequate disclosure of relevant information including management fees
  - acting in principal's best interests
  - ethical representation of organisation and clients
  - identification and disclosure of conflicts of interest
  - declaration of any beneficial interests
  - fair and honest provision of property services
  - non-discriminatory practices
- mechanisms to obtain and analyse feedback
- principles and techniques associated with:
  - leading people
  - preparing performance plans
  - establishing key performance indicators
  - influencing others
  - establishing effective consultative processes
  - making decisions
- characteristics of a positive role model
- methods to identify and prioritise personal learning needs
- limitations of work role, responsibility and professional abilities
- common effects of change in the workplace
- industrial and organisational context of change
- OHS issues and requirements
- EEO, equity and diversity principles
- relevant legislation and statutory requirements

**Required skills and attributes include:**

- self evaluation skills to:
  - systematically review and assess own work practices to identify ways to improve performance or understanding
- organisational skills to:
  - plan and meet work priorities
  - plan and maintain own professional development
  - introduce and monitor change
- communication skills to:
  - interpret and apply legislative, financial and procedural requirements
  - read and understand a variety of information
  - consult effectively with clients and colleagues
- coaching and mentoring skills to:
  - provide support to colleagues
  - be a positive influence on others
- reflection skills to:
  - differentiate between professional and personal values
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - respect individual differences

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from modelling high standards of performance and introducing change, to planning and implementing strategies to develop own professional competence
- evidence must include copies of work plans and schedules, documentation demonstrating consultation through a change process and how feedback was obtained and used to plan own continuous professional development

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD409A****Participate in contract development and establishment****Unit Descriptor**

This competency standard specifies the outcomes required to participate in the development of contracts for property/facility management and/or maintenance operations. It requires the ability to accurately determine and comply with contract specifications and guidelines, and prepare and finalise contract documentation

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                    |   |
|------------------------------------|---|
| 1. Determine contract requirements | <ul style="list-style-type: none"> <li>1.1 Contract requirements are reviewed and verified in accordance with <i>client, organisational and legislative requirements</i></li> <li>1.2 <i>Consultative processes</i> are used to negotiate and confirm contract specifications with <i>relevant people</i></li> <li>1.3 Relevant <i>information</i> is sourced and assessed for currency, accuracy and relevance in accordance with organisational requirements</li> <li>1.4 Methods for gathering information are reliable and make efficient use of time and <i>resources</i> in accordance with organisational requirements</li> <li>1.5 Personal limitations in assessing contract requirements are identified and assistance sought as required from relevant people</li> </ul>   |
| 2. Prepare contract                | <ul style="list-style-type: none"> <li>2.1 Contract is prepared according to contract specifications and in consultation with relevant people using appropriate <i>communication techniques</i></li> <li>2.2 <i>Business equipment/technology</i> is used to prepare contract in the required format, style and structure in accordance with applicable occupational health and safety (OHS) requirements</li> <li>2.3 Advice is sought to confirm contract captures and addresses identified <i>risks</i>, protection of contracted parties, and provides basis for due performance</li> <li>2.4 Contract is distributed to relevant people to check accuracy of information and that contract specifications and requirements are clearly addressed</li> <li>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 3. Finalise contract               | <ul style="list-style-type: none"> <li>3.1 Contract is finalised within agreed timeframes and in accordance with client, organisational and legislative requirements</li> <li>3.2 <i>Feedback</i> on suitability of contract is sought from relevant people and recommended improvements incorporated into contract where appropriate</li> <li>3.3 Any gaps or deficiencies are identified and appropriate actions implemented in accordance with client, organisational and legislative requirements</li> <li>3.4 All information is securely maintained with due regard to client confidentiality in accordance with legislative and organisational requirements</li> </ul>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing and clarifying contract requirements	2
Collecting analysing and organising information	locating and assessing information to establish contract requirements	3
Planning and organising activities	preparing contract within established timeframes	2
Working with others and in teams	collaborating with relevant people to seek and incorporate feedback into contract documentation	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge and seeking specialist advice as required	2
Using technology	sourcing, reviewing and documenting information	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- property owners
- property agents
- tenants
- building supervisors
- project managers
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- company management

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Relevant people may include:**

- supervisors
- colleagues
- clients
- parties to contract
- legal representatives
- government agencies
- industry regulators and associations



**Information may relate to:**

- contracts
- agreements
- permits
- building codes
- licences
- specifications
- agreements
- plans
- operating costs
- depreciation schedules
- company services

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Risks may relate to:**

- failure of a contracted party to comply with contract terms and conditions
- loopholes in contract
- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- suppliers and contractors
- changes to regulations and legislation
- time constraints
- emergencies and disasters

**Specialist advice may be sought via:**

- solicitors/legal representatives
- supervisor/colleagues
- technical experts
- government officials
- industry professionals and associations

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- using consultative processes to review and confirm contract requirements and specifications
- using business equipment/technology to prepare contract documentation
- seeking advice as required to confirm contract specifications have been addressed
- finalising contract within agreed timeframes using obtained feedback to rectify any gaps or deficiencies

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS issues, equal opportunity, industrial relations and anti-discrimination
- contract layout, format and presentation methods
- contracts law and property use
- relevant legislation that affects property contracts
- relevant Acts and regulations
- limitations of work role, responsibility and professional abilities

**Required skills and attributes include:**

- communication skills to:
  - interpret written and oral information
  - discuss and confirm contract specifications
  - obtain feedback
- technical skills to:
  - prepare contract documentation
- analytical skills to:
  - interpret contract requirements
  - evaluate sufficiency of contract
- organisational skills to:
  - organise work schedules and timelines
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately determining contract requirements to preparing a contract in accordance with specifications
- evidence must include copies of documentation associated with at least two finalised contracts including obtained feedback

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD410A****Unit Descriptor****Implement and monitor procurement process**

This competency standard specifies the outcomes required to implement and monitor purchasing processes for goods and services. It requires the ability to follow procurement procedures, determine and arrange appropriate suppliers, and check the final procurement meets client objectives.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Determine procurement requirements        | <p>1.1 <i>Procurement</i> requirements and objectives are identified and confirmed in accordance with <i>organisational and legislative requirements</i></p> <p>1.2 Relevant <i>information</i> is gathered and reviewed to determine appropriate <i>procurement process</i> and timelines in accordance with legislative requirements</p> <p>1.3 <i>Factors likely to affect procurement objectives</i> are identified and verified with <i>relevant people</i> in accordance with organisational procedures</p> <p>1.4 Personal limitations of authority are identified and <i>appropriate approvals</i> gained as required in accordance with organisational and legislative requirements</p> |
| 2. Implement and monitor procurement process | <p>2.1 Procurement process is systematically monitored and variations to supply verified with relevant people in accordance with organisational requirements</p> <p>2.2 Effective <i>communication channels</i> are used to ensure an effective and accurate communication flow with suppliers</p> <p>2.3 Expenditure and resource usage is monitored to ensure procurement objectives are achieved within budget parameters</p> <p>2.4 Methods for monitoring procurement are reliable and make efficient use of time and <i>resources</i> in accordance with organisational requirements</p>   |
| 3. Finalise procurement process              | <p>3.1 Procurement process is finalised within agreed timeframes in accordance with organisational requirements</p> <p>3.2 Inspection is arranged to confirm procurement meets required quality standards and procurement objectives</p> <p>3.3 Any defects or variances to procurement objectives are identified and prompt remedial action is implemented in accordance with organisational requirements</p> <p>3.4 <i>Business equipment/technology</i> is used to maintain systems, <i>records and reports</i> in accordance with applicable occupational health and safety (OHS), organisational and legislative requirements</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing and clarifying procurement arrangements with suppliers	2
Collecting analysing and organising information	sourcing procurement information and using it to identify appropriate procurement processes	3
Planning and organising activities	implementing procurement processes within agreed timeframes	2
Working with others and in teams	collaborating with relevant people to implement procurement arrangements and gaining appropriate approvals as required	1
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	implementing prompt remedial action to address defects or variances to procurement objectives	2
Using technology	maintaining systems, records and reports	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Procurement may include:

- leasing, buying
- short-term or long-term arrangements
- sole or multiple suppliers
- maintenance and support arrangements
- incentive contracting
- franchising
- research and development
- pre-qualification of suppliers
- standing orders
- standard form agreements
- common use contracts
- facilities management
- prime contractor/sub-contractor
- gainsharing/open book

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Information may relate to:**

- procurement guidelines, practices and policies
- organisational and business strategic plans
- contracts and tender documentation
- register of suppliers
- quotations and invoices
- facility/asset management plans
- maintenance plans and strategies
- budgets and operating costs
- goods and services
- policy/management procedures
- legal documentation
- tenancy and other contracts
- property drawings

**Procurement process may include:**

- open quotations
- tendering (both complying and non-complying)
- advertisement
- register of suppliers
- direct appointments

**Factors that may impact on procurement objectives may relate to:**

- supply market capacity, structure, maturity and strength
- factors/conditions which may affect supply
- potential impact of intended contracting activity
- level of risk, complexity and sensitivity
- leasing instead of up-front capital investment
- strategic/tactical issues
- political imperatives and strategies
- budgetary constraints
- collaborative arrangements
- industry involvement requirements
- environmental issues

**Relevant people may include:**

- supervisor
- technical experts
- colleagues
- clients
- legal representatives
- industry professionals and associations
- tenants
- property/facilities owners/managers
- agents
- government personnel

**Appropriate approvals may be sought from:**

- supervisor
- authorised delegations
- clients
- solicitors
- agents

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Resources may include:**

- personnel
- information technology
- contractors
- professional service providers
- materials
- facilities
- services
- tools and equipment
- transport



**Business equipment/  
technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Records and reports may  
include:**

- organisational forms
- procurement forms and reports
- quotations
- invoices
- contracts/tenders
- statements
- logs/journals
- running sheets
- task allocation sheets
- records of conversation
- written/computer-based information
- radio/telephone records

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates  
competency in this standard  
must be able to provide  
evidence of:**

- accurately reviewing procurement objectives and relevant information to determine procurement processes, and sourcing appropriate authority/delegations for procurement
- using communication to effectively monitor procurement process implementation against budget parameters
- finalising procurement process within agreed timeframes and using business equipment/technology to maintain records and reports

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- key principles of procurement, including:
  - value for money
  - open and effective competition
  - accountability and recording
  - ethics and fair dealing
  - planning and professionalism
- implications of warranties, guarantees and exclusions
- whole of life costing and price-quality relationship issues
- limitations of work role, responsibility and professional abilities
- relevant Acts, regulations and Australian Standards
- tendering and contracting processes, including a range of contractual arrangements
- benefits and risks of a range of procurement options such as lease purchase, sale and leaseback, and term contract
- user needs and requirements for facilities
- organisations policies and procedures for employment/tendering of services and procurement
- best practice procurement principles

**Required skills and attributes include:**

- communication skills to:
  - interpret written and oral information
  - discuss and confirm procurement arrangements
  - obtain feedback
  - liaise with suppliers
- technology skills to:
  - maintain a database of information about suppliers
  - maintain records and reports
  - complete documentation
- literacy skills to:
  - read and understand a variety of information
  - interpret procurement policies and procedures
- organisational skills to:
  - coordinate work schedules and timelines
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining procurement requirements to monitoring processes and checking final procurement
- evidence must include copies of documentation associated with at least two finalised procurement processes including completed records and reports

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD411A****Contribute to the development of a tenancy mix strategy****Unit Descriptor**

This competency standard specifies the outcomes required to identify client objectives and recommend strategies to assist in the implementation of tenancy mix strategy. It requires the ability to determine industry trends and report findings.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                      |   |
|--------------------------------------|---|
| 1. Identify tenancy mix requirements | <ul style="list-style-type: none"> <li>1.1 Client <i>preferences, needs and expectations</i> are determined in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Information</i> is gathered and analysed to determine <i>market conditions</i> in accordance with organisational requirements</li> <li>1.3 Client preferences are examined to determine short and long term goals in accordance with organisational requirements</li> <li>1.4 <i>Tenancy mix</i> objectives and timelines are negotiated and agreed in consultation with <i>relevant people</i></li> </ul>  |
| 2. Recommend tenancy mix strategy    | <ul style="list-style-type: none"> <li>2.1 <i>Segmentation criteria</i> is applied to determine tenancy mix which meets client and <i>building capacity requirements</i></li> <li>2.2 Tenancy mix is sought which adds value to property and encourages effective competition in accordance with income projections</li> <li>2.3 Draft tenancy mix recommendations are prepared and distributed to relevant people in accordance with organisational requirements</li> <li>2.4 <i>Marketing options</i> to meet requirements of tenancy mix strategy are identified and <i>feedback</i> sought from relevant people in accordance with organisational requirements</li> </ul>   |
| 3. Report on tenancy mix strategy    | <ul style="list-style-type: none"> <li>3.1 Tenancy mix documentation is obtained and any variances recognised and promptly reported to relevant people in accordance with organisational requirements</li> <li>3.2 Tenancy mix strategy documentation is reviewed to ensure compliance with applicable <i>legislative requirements</i></li> <li>3.3 Recommendations for improvement of the strategy are presented to relevant people in accordance with organisational requirements</li> <li>3.4 <i>Business equipment/technology</i> is used to complete and process relevant documentation in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements</li> </ul> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing tenancy needs with client, colleagues and prospective tenants	2
Collecting analysing and organising information	applying criteria to determine market segments	3
Planning and organising activities	setting goals and establishing timelines to suit both long and short term projections	3
Working with others and in teams	obtaining feedback on recommendations to tenancy mix strategy	2
Using mathematical ideas and techniques	establishing timelines	2
Solving problems	negotiating objectives and timelines with client and colleagues	2
Using technology	preparing reports and recommendations	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- bankers
- company boards

### Client needs and expectations may relate to:

- short and long term goals
- income stream projections
- long term tenancy contracts
- increased profile of asset

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Information which may be used to determine market profiles and conditions may include:**

- industry sources
- existing research data
- original research
- response based research
- surveys

**Market conditions may relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Tenancy mix may cover:**

- number of tenants
- type of tenancy
- length of tenancy
- type of business
- type of tenant customers
- location
- size of tenancy

**Relevant people may include:**

- managers
- clients
- architects
- industry professionals and associations
- business consultants
- real estate agents
- advertising agencies
- taxation and accounting practitioners
- solicitors

**Segmentation criteria to be used may include but is not limited to:**

- consumer requirements
- desired benefits
- product/service usage
- attitude
- demographics
- lifestyle
- social and cultural factors
- business characteristics

**Building capacity requirements may relate to:**

- car parking
- building functions
- amenities
- associated conditions (noise, dust, environment)

**Marketing options may include:**

- direct marketing
- business-to-business marketing
- mail-outs
- use of internet/email
- target markets by service type
- promotional strategies such as:
  - canvassing and telephone canvassing
  - pricing
  - public relations
  - image and presentation
  - advertising
  - community education

**Feedback may be obtained from:**

- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings
- workplace assessment

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy laws applying to owners, contractors, tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- trade practices laws and guidelines
- corporations law
- Commonwealth/State/Territory legislation regarding retail/commercial tenancy
- Commonwealth/State/Territory zoning requirements
- retail and commercial leasing Acts/guidelines
- strata, community and company titles
- tenancy agreements
- home building requirements

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- examining client business plans and accurately profiling the client tenancy needs
- preparing and documenting a tenancy mix strategy which details the targeted market segment
- obtaining feedback on draft tenancy mix strategy and amending accordingly
- sourcing and selecting suitable marketing strategies

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- industry benchmarks
- relevant local market conditions
- a range of tenancy mix strategies
- ways to obtain feedback
- organisations documentation and reporting procedures
- market segments
- organisational and professional procedures, ethical practices and business standards
- common lease terms and conditions
- types of property leases



**Required skills and attributes include:**

- problem solving skills to:
  - identify appropriate marketing options
- planning skills to:
  - determine short and long term goals
- presentation skills to:
  - prepare and deliver tenancy mix options to clients
- communication skills to:
  - interpret written and oral information
  - consult with clients
- technical skills to:
  - prepare and complete reports
- research skills to:
  - interpret documentation
  - evaluate current market conditions and assess future trends
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - obtain feedback

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- lease/tenancy documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying client requirements, recommending a tenancy mix strategy to reporting on a tenancy mix strategy
- evidence must include completed documentation contributing to a tenancy mix strategy, including market analysis and evaluation of industry benchmarks, recommended marketing options and feedback obtained

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD412A****Unit Descriptor****Participate in research of property investment**

This competency standard specifies the outcomes required to research and provide advice on a current or proposed property investment. It requires the ability to determine client requirements and collect and analyse appropriate data from a range of sources.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Determine client requirements            | <ul style="list-style-type: none"> <li>1.1 Consultative processes are used to verify <i>client expectations</i> and objectives in accordance with <i>organisational requirements</i></li> <li>1.2 Valid and relevant <i>information</i> is obtained to determine the complexity of client needs in accordance with organisational requirements</li> <li>1.3 Client investment history is analysed to determine <i>client profile</i> in accordance with <i>legislative requirements</i></li> <li>1.4 Specialised resources and <i>sources of property market information</i> are identified and accessed in accordance with organisational requirements</li> </ul>  |
| 2. Access property market information       | <ul style="list-style-type: none"> <li>2.1 Property market information is gathered and organised in a format suitable for analysis and interpretation</li> <li>2.2 Methods for gathering information are reliable and make efficient use of time and resources in accordance with organisational requirements</li> <li>2.3 Appropriate <i>communication techniques</i> are used to access relevant information from individuals and groups</li> <li>2.4 <i>Comparative market data</i> is documented and categorised to enable valid comparisons to be made against <i>industry benchmarks</i></li> <li>2.5 Discrepancies in data are identified by obtaining and comparing data from a variety of sources</li> </ul>                                       |
| 3. Interpret trends and market developments | <ul style="list-style-type: none"> <li>3.1 Relevant industry benchmarks are identified to allow effective comparability against client needs in accordance with organisational requirements</li> <li>3.2 Property trends and <i>market conditions</i> are identified and evaluated against industry benchmarks to determine risk</li> <li>3.3 <i>Analysis</i> is undertaken of comparative market data using standard industry analysis techniques</li> <li>3.4 Factors increasing or diminishing investment risk are identified, analysed and discussed with the client</li> <li>3.5 Limitations in evaluating market information are identified and <i>specialist advice</i> sought as required in accordance with organisational requirements</li> </ul> |

4. Make recommendations
- 4.1 Property investment research and options are documented and distributed in accordance with organisational requirements
  - 4.2 Recommendations are verifiable, current and sufficiently detailed to meet client, organisational and legislative requirements
  - 4.3 *Business equipment/technology* is used to complete and process client and market information in accordance with applicable occupational health and safety (OHS) and organisational requirements
  - 4.4 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	confirming and clarifying client needs and providing suitable investment options	2
Collecting analysing and organising information	assessing, documenting and categorising comparative market data against industry benchmarks	3
Planning and organising activities	sourcing and organising access to specialised resources and other sources of property market information	3
Working with others and in teams	obtaining feedback to confirm reliability and accuracy of sourced information	2
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	undertaking further assessment to ensure consistency of analysis conclusions	2
Using technology	researching, analysing and preparing market data for presentation	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Clients may include:**

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- bankers

**Client expectations may relate to:**

- immediate capital gains
- long-term capital gains

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Information may relate to:**

- relevant personal, financial and business details
- taxation obligations
- existing client risk management strategies
- cash flows (required and projected)
- other client details such as employment security, likely events and their impact on the client
- individual investment preferences and aversion or tolerance to risk

**Client profile may include:**

- details of client needs and objectives for income, security, liquidity, and the time period
- client current and proposed operating environment, assets and systems

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Sources of property market information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes
- industry/organisational databases

**Communication techniques may include but are not limited to:**

- active listening
- using open and/or closed questions
- speaking clearly and concisely
- using appropriate language and tone of voice
- maintaining eye contact
- non-verbal communication (body language, personal presentation)
- clear, legible writing

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Market conditions may include:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- land economists
- other developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations
- business consultants
- real estate agents

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- providing accurate property investment information for defined client purposes
- sourcing, organising, analysing and maintaining information using technology appropriate to the task
- using appropriate research and data analysis techniques
- carrying out comprehensive data analysis of relevant market information sufficient to make valid recommendations
- sourcing specialist advice when required

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS, environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- local property market conditions and overall trends in the industry
- concepts and strategies for placement of capital in property for investment
- industry benchmarks
- a range of research methods and analysis techniques
- valuation and appraisal methods
- effective communication strategies
- investment risk factors and relationship to return expectations
- investor psychology
- building and construction methods
- broad knowledge of land economics, theory and practice



**Required skills and attributes include:**

- technology skills to:
  - efficiently use financial and assessment software and spreadsheets
  - access market information
- organisational skills to:
  - maintain records and databases
  - use organisational filing systems
  - organise and prepare property investment submissions
  - build models for property investment
- problem solving skills to:
  - anticipate factors which may affect property markets
- analytical skills to:
  - apply basic statistical methods and techniques
- research skills to:
  - source, analyse and interpret property and market information
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - deal with property investment stakeholders

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from sourcing, organising and analysing reliable information to providing property investment options to clients
- evidence must include documentation showing how client needs were verified, a range of sourced market information, use of data analysis techniques to research investment risk, final documentation presented to client outlining options

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD413A****Unit Descriptor****Contribute to lifecycle maintenance strategy**

This competency standard specifies the outcomes required to determine maintenance strategies that contribute to lifecycle management of assets. It requires the ability to identify maintenance requirements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |   |
|---------------------------------------|---|
| 1. Identify asset requirements        | <ul style="list-style-type: none"> <li>1.1 <i>Assets</i> are identified and relevant <i>documentation</i> obtained and analysed to establish asset <i>evaluation parameters</i></li> <li>1.2 Appropriate <i>interpersonal techniques</i> are used to consult and elicit information from <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.3 <i>Source documents</i> are accessed and reviewed to ensure information is valid and reliable in accordance with <i>legislative requirements</i></li> <li>1.4 <i>Asset characteristics</i> are assessed and documented in a <i>maintenance strategy</i> in accordance with organisational requirements</li> </ul>  |
| 2. Recommend strategy                 | <ul style="list-style-type: none"> <li>2.1 Information and data on <i>asset performance</i> is gathered and analysed against industry benchmarks</li> <li>2.2 Asset performance is established and appropriate <i>maintenance methods and schedules</i> documented in accordance with organisational requirements</li> <li>2.3 <i>Strategic prioritisation</i> is undertaken to identify risks, anticipate future maintenance requirements and identify opportunities to improve quality or cost efficiency of asset</li> <li>2.4 <i>Limitations</i> in providing objective client advice is recognised and specialist advice sought as required</li> <li>2.5 Cost effective solutions regarding <i>asset lifecycle</i> are presented to relevant people in required format, style and structure</li> </ul> |
| 3. Monitor and report on the strategy | <ul style="list-style-type: none"> <li>3.1 Asset lifecycle maintenance strategy is monitored and evaluated to ensure it is effective and meets organisational and system requirements</li> <li>3.2 <i>Feedback</i> is used to identify and develop future strategies to improve lifecycle maintenance</li> <li>3.3 <i>Business equipment/technology</i> is used to complete and process relevant documentation in accordance with applicable occupational health and safety (OHS) and organisational requirements</li> <li>3.4 All <i>asset information</i> is securely maintained with due regard to client confidentiality in accordance with organisational and legislative requirements</li> </ul>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sourcing and identifying lifecycle maintenance requirements and information from relevant people	2
Collecting analysing and organising information	using established processes to source and collate information and developing recommendations on system requirements	3
Planning and organising activities	scheduling, coordinating, monitoring and reviewing the asset management system	3
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and receive feedback	2
Using mathematical ideas and techniques	accessing and interpreting asset information	1
Solving problems	adapting information gathering activities to obtain additional data	2
Using technology	using databases to monitor lifecycle costs	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Assets may be static or dynamic and may include:**

- property/facilities
- equipment
- land
- buildings
- furniture
- vehicles

**Documentation may include:**

- service/maintenance records
- equipment/system problems/faults
- warranty conditions and allowances
- recommendations for repairs
- operational checks and maintenance conducted
- testing and commissioning results
- costings, receipts, invoices
- property leases, plans or contracts
- planning permits
- certifications
- inspection certificates

**Evaluation parameters may relate to:**

- physical condition
- utilisation
- functionality
- financial performance

**Interpersonal techniques may include:**

- consultation methods
- seeking feedback
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Source documents may include:**

- company asset documents and registers
- reports and inventories
- asset valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Asset characteristics may relate to:**

- effective life
- location in lifecycle
- when constructed/rehabilitated/replaced
- actual or estimated residual life
- previous inspection date and process
- prediction of deterioration/failure
- effect of planned maintenance
- possibility/cost/impact on level of service
- commercial or technical obsolescence

**Maintenance strategy may include:**

- asset replacement strategies
- painting, cleaning, waste disposal
- emergency lighting, security, pests
- energy efficiency strategies
- plumbing, electrical
- housekeeping

**Asset performance criteria may relate to:**

- functionality
- emergency operation and backup
- security
- downtime
- service levels
- maintenance requirements and cost
- life span
- condition assessment
- depreciation
- costs
- replacement
- age

**Maintenance methods may include:**

- in-house employee services
- outsourcing through external contracts
- lease contractual obligations

**Maintenance schedules may be prepared for:**

- daily
- weekly
- monthly
- annual timeframes

**Strategic prioritisation could be based on criteria that may include:**

- how long the particular asset will be required to be in operation
- future usage plans for the asset
- owner/manager specific requirements for aesthetics
- serviceability requirements of the asset
- effect of not maintaining an asset
- risks associated with not maintaining a particular asset
- likely value adding of maintain an asset
- risk associated with the current condition

**Limitations may include:**

- job role and responsibilities
- quality processes
- own competency level
- industry requirements
- own understanding of risk identification processes
- legal responsibilities

**Clients may include:**

- owners
- property agents
- tenants
- builders
- real estate agents
- building inspectors

**Asset lifecycle may relate to:**

- planning for and establishment of a new asset
- replacement
- acquisition
- operation
- maintenance
- disposal

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Asset information may relate to:**

- register of assets
- insurance
- residual life of assets
- property management reports
- maintenance schedules
- operating environment of organisation (financial markets, competitors, core business activities, functions, stakeholders)
- lines of responsibility
- key personnel
- reports and relevant documentation
- historical data



## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- ascertaining asset system requirements through analysis of business/operational plans and consultation
- determining asset performance needs using industry benchmarks and consideration of risk
- identifying performance of assets and incorporating lifecycle strategies into maintenance plans
- obtaining ideas using consultation techniques and presenting cost effective solutions
- monitoring asset lifecycle strategies through obtaining feedback and using sound evaluation techniques

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- basic knowledge of property contracts and administrative requirements
- company record keeping policies and procedures
- common hazards to public and personal safety associated with particular types of maintenance work in buildings
- relevant building service, trades and operation for maintenance operations
- industry benchmarks for maintenance procedures
- asset lifecycles
- budgets and financial reporting

**Required skills and attributes include:**

- technology skills to:
  - use software packages to classify, record and monitor assets
  - select and use technology appropriate to the task
- literacy skills to:
  - read and understand a variety of information
  - interpret property asset records
- organisational skills to:
  - maintain records and databases
  - use organisational asset systems
- problem solving skills to:
  - solve routine database problems
  - source additional information if required
- analytical skills to:
  - analyse property asset records
  - classify assets
- interpersonal skills to:
  - liaise to obtain asset information
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying asset requirements to monitoring and reporting on the strategy
- evidence must include a database of asset information which has been updated, evidence of information which has been checked for accuracy, recommendations made regarding asset lifecycles and feedback obtained on appropriateness and sufficiency of information

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD414A****Unit Descriptor****Facilitate meetings**

This competency standard specifies the outcomes required to prepare for meetings and facilitate groups to discuss common issues. It requires the ability to coordinate meeting arrangements, communicate effectively with a range of audiences, and accurately record meeting outcomes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                            |  |
|----------------------------|--|
| 1. Arrange meetings        | <p>1.1 The <i>type of meeting</i> and its purpose are identified and meeting arrangements made in accordance with statutory and <i>organisational requirements</i></p> <p>1.2 <i>Meeting participants</i> are identified and meeting scheduled to provide maximum opportunities for attendance</p> <p>1.3 Participants are notified of <i>meeting agenda</i> and any <i>specific requests</i> are promptly actioned in accordance with organisational requirements</p> <p>1.4 Participants are advised of any changes to original meeting details in accordance with organisational requirements</p>   |
| 2. Facilitate meetings     | <p>2.1 An open and participative environment is provided for participants to discuss common issues in accordance with ethical and <i>legislative requirements</i></p> <p>2.2 Arrangements for taking meeting notes are made to ensure an accurate record of meeting in accordance with organisational and statutory requirements</p> <p>2.3 Meeting facilitation enables participation, discussion, problem solving and <i>resolution of issues</i></p> <p>2.4 <i>Meeting style and structure</i> is selected appropriate to meeting purpose</p> <p>2.5 <i>Leadership styles</i> are used which provide clear information at appropriate stages during meeting to assist in mutual understanding and agreement</p> |
| 3. Record meeting outcomes | <p>3.1 <i>Meeting notes</i> are checked to ensure accuracy of information and are formatted in accordance with organisational and statutory requirements</p> <p>3.2 Meeting issues raised which require urgent action are identified and addressed with relevant people in accordance with organisational procedures</p> <p>3.3 Meeting records are distributed to relevant people within agreed timeframes and securely maintained in accordance with organisational requirements</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	applying active listening skills and adopting appropriate communication style to target audience	3
Collecting analysing and organising information	accessing required information to assist in the development of meeting agendas	2
Planning and organising activities	preparing agendas and arranging participants	2
Working with others and in teams	facilitating active discussion and using appropriate questioning techniques to obtain feedback throughout meeting	2
Using mathematical ideas and techniques	managing time and meeting designated timelines	1
Solving problems	using negotiation skills to resolve conflict	2
Using technology	recording minutes and distributing meeting agendas	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Meetings may be:

- formal and informal health and safety meetings
- committees, for example, consultative planning and purchasing
- meetings called by tenant representatives
- suggestions, requests, reports and concerns put forward to committees or management

**Type of meeting may be:**

- one-off
- regular
- teleconferences
- video-conferences
- committee meetings
- board meetings
- formal
- informal
- semi-formal
- staff meeting

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Meeting participants may be:**

- owners
- tenants
- agents
- legal representatives
- OHS safety committees
- colleagues
- clients
- contractors
- internal clients (individuals, teams, consultants, committees)
- external clients (customers, business contacts, persons working in a similar field)

**Meeting agenda may include:**

- statement of meeting's purpose
- date, time and location of meeting
- matters or business arising from previous minutes
- reports
- correspondence

**Specific requests may include:**

- minutes of previous meetings
- specific documentation
- inclusion of agenda items
- inviting additional representatives
- new timing/location

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resolution of issues may be negotiated using techniques such as:**

- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to target audience
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- seeking feedback

**Style and structure of the meeting may be formal or informal and include:**

- use of visuals
- guest speakers
- structured agenda and timeframes
- meeting chair

**Leadership styles and methods may include:**

- techniques for initiating action and directing decision making
- strategies for presenting a confident, assured and unhesitant manner in challenging situations
- strategies for not accepting unreasonable expectations
- maintaining ethical practice and beliefs in the face of opposition
- modelling behavioural and personal presentation standards
- time management
- strategies for acknowledging and respecting the attitudes and beliefs of others
- techniques for promoting active and genuine participation

**Meeting notes may include:**

- attendees and apologies
- points discussed at the meeting
- suggestions made at the meeting
- issues raised
- decisions made
- future action to be taken

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- effectively planning and administering meetings using appropriate statutory procedures and protocols
- using effective communication and presentation skills to manage and conduct meetings
- accurately recording and securely maintaining meeting discussions
- using technology to prepare documentation relating to meeting outcomes and distributing to relevant people in a timely manner

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- different types and formats of meetings including general awareness of procedures for formal meetings
- group dynamic principles and theory
- types of minutes and their purpose
- meeting terminology
- standard meeting procedures including:
  - agenda format and order
  - types of seating arrangements
  - role of chairperson
- organisations record and reporting system

**Required skills and attributes include:**

- conflict management skills to:
  - manage and work with a group to resolve problems and develop action plans
- written communication skills to:
  - prepare agendas
  - take supporting notes and minutes
  - summarise meeting
- communication skills to:
  - encourage, listen to and incorporate feedback
  - conduct oral presentations to a group
  - answer questions
- planning skills to:
  - manage time effectively
  - prepare for meetings
- report writing skills to:
  - organise and assess information
  - source additional information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities



**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from arranging and facilitating meetings to documenting meeting outcomes
- evidence must include meeting agendas, minutes and documentation outlining meeting processes and outcomes for at least two meetings

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD415A****Unit Descriptor****Arrange the lease of space**

This competency standard specifies the outcomes required to arrange and formalise lease arrangements for the use of space. It requires the ability to ascertain lease requirements, coordinate lease documentation and formalise and review lease processes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                 |   |
|---------------------------------|---|
| 1. Establish lease requirements | <ul style="list-style-type: none"> <li>1.1 <i>Space</i> lease requirements are determined in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 Appropriate <i>interpersonal techniques</i> are used to confirm and clarify <i>client needs</i></li> <li>1.3 Lease terms and conditions are identified from <i>relevant documentation</i> and compared with appropriate market evidence</li> <li>1.4 Retention strategies are devised and marketed to selected tenants in accordance with client, organisational and <i>legislative requirements</i></li> <li>1.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 2. Arrange lease agreement      | <ul style="list-style-type: none"> <li>2.1 <i>Lease agreement</i> is arranged in accordance with applicable organisational and legislative requirements</li> <li>2.2 Appropriate interpersonal techniques are used to facilitate an accurate and relevant exchange of information with legal advisers</li> <li>2.3 Lease documentation is reviewed for accuracy and to ensure it meets client, legal and organisational requirements</li> <li>2.4 Necessary amendments to documents are arranged prior to execution in accordance with legal and organisational requirements</li> </ul>   |
| 3. Formalise lease arrangements | <ul style="list-style-type: none"> <li>3.1 Lease arrangements are implemented in accordance with client, organisational and legal requirements</li> <li>3.2 Lease documentation is distributed to relevant people to enable necessary stamping and registration to occur</li> <li>3.3 Copies of lease contracts are distributed to contracting parties to confirm respective obligations in accordance with legislative and organisational requirements</li> <li>3.4 Agents are appointed to facilitate the completion of leasing arrangements in accordance with organisational requirements</li> <li>3.5 Lease records and relevant information are securely stored in accordance with legislative and organisational requirements</li> </ul>                                     |

4. Review leasing arrangements
- 4.1 Leasing arrangements and documentation are reviewed in accordance with client, legislative and organisational requirements
  - 4.2 Variations to leasing requirements are identified and negotiated with relevant people and amendments made in accordance with client, legislative and organisational requirements
  - 4.3 Lease arrangements are monitored to ensure they meet the obligations of the lease agreement and relevant legislative and organisational requirements
  - 4.4 *Business equipment/technology* is used to securely maintain relevant documentation in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying lease requirements and negotiating lease agreement	2
Collecting analysing and organising information	sourcing documentation to assess and review lease terms on property usage	2
Planning and organising activities	developing tenant retention strategies and implementing lease arrangements	3
Working with others and in teams	collaborating with relevant people to develop lease agreements and contracts	2
Using mathematical ideas and techniques	analysing market data	2
Solving problems	recognising personal limitations in making a determination and seeking specialist advice where required	2
Using technology	sourcing, collating and formatting leasing data	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Space may include:**

- car parking
- buildings
- facilities
- properties
- lettable areas
- land

**Relevant people may include:**

- clients
- tenants
- supervisors
- management
- colleagues
- legal representatives
- designated occupational health and safety (OHS) representatives
- site personnel
- industry professionals and associations
- property owners
- agents
- government personnel

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- consultation methods
- culturally inclusive and sensitive engagement techniques
- seeking feedback

**Clients may include:**

- property owners
- property agents
- tenants
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management
- bankers

**Client needs may relate to:**

- observance of building rules
- managing fit-outs to preserve building services
- developing fit-out guidelines for builders
- facilitating transaction by separately meeting with fit-out and legal advisers

**Relevant documentation may include:**

- contracts
- instruments of agreement
- lease agreements
- permits
- building codes
- licences
- specifications
- plans
- maps
- spacial guidelines

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Lease arrangements may include:**

- heads of agreement
- agreement to lease
- letters of intent
- negotiations which contain offer
- acceptance and consideration
- fit-outs
- existing partitioned space
- relative lessee/lessor obligations
- building rules

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining requirements for space lease through an accurate assessment of client needs and identification of lease terms and conditions
- devising and marketing retention strategies to selected tenants
- organising the preparation of lease documentation, reviewing for accuracy and arranging necessary amendments as required
- implementing lease arrangements including appointing an agent to facilitate the completion of leasing arrangements
- monitoring lease arrangements against lease agreement requirements, and safely and securely maintaining all relevant documentation

**Required knowledge and understanding includes but is not limited to:**

- contract law applied to property lease
- industry practices and processes
- common lease terms and conditions
- types of property leases
- legal operations for lease preparation
- government duties and taxes as applied to lease documentation
- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities

**Required skills and attributes include:**

- communication skills to:
  - clarify lease requirements
  - interpret written and oral information
  - negotiate lease arrangements
  - prepare reports
- technical skills to:
  - prepare and complete reports
- analytical skills to:
  - interpret property plans and lease documentation
  - analyse and assess lease requirements and terms
  - devise retention strategies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining lease requirements to arranging and executing lease agreements and reviewing the process
- evidence must include documentation of lease arrangements for at least two leases, and copies of lease agreements and retention strategies

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



**PRDPOD416A****Unit Descriptor****Monitor space use**

This competency standard specifies the outcomes required to monitor the ongoing use of space. It requires the ability to determine space requirements, analyse compliance against lease agreements and make recommendations on space optimisation and efficiency.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                     |   |
|-------------------------------------|---|
| 1. Determine space use requirements | <ul style="list-style-type: none"> <li>1.1 <i>Space</i> use requirements are verified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 Client <i>needs</i> are accurately assessed and clarified using appropriate <i>interpersonal techniques</i></li> <li>1.3 Lease terms and conditions are ascertained from <i>relevant documentation</i> and compared with client needs and appropriate market evidence</li> <li>1.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul>  |
| 2. Review space use                 | <ul style="list-style-type: none"> <li>2.1 Space use is regularly monitored to ensure compliance with contractual obligations regarding lease and relevant organisational and <i>legislative requirements</i></li> <li>2.2 <i>Variations</i> to space use requirements are promptly identified and addressed in accordance with organisational policies and procedures</li> <li>2.3 Actual space use is calculated and benchmarked against <i>spacial guidelines</i> to establish degree of space optimisation</li> <li>2.4 Monitoring process, including regular reviews with users, is reliable and makes efficient use of time and resources in accordance with organisational requirements</li> </ul>   |
| 3. Record and report results        | <ul style="list-style-type: none"> <li>3.1 Recommendations are organised in a format suitable for analysis and dissemination to relevant people in accordance with client and organisational requirements</li> <li>3.2 Identified non-conformances are highlighted in report and referred for future action in accordance with organisational requirements</li> <li>3.3 Space use assessment is supported by verifiable evidence and is consistent with relevant legislative and organisational requirements</li> <li>3.4 <i>Business equipment/technology</i> is used to maintain relevant documentation in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements</li> <li>3.5 Report is distributed promptly to relevant people in accordance with client and organisational requirements</li> </ul> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	ascertaining client and tenant requirements and contractual obligations	3
Collecting analysing and organising information	compiling, documenting and reporting an assessment of space usage	2
Planning and organising activities	coordinating lease arrangements and reviews with tenants	3
Working with others and in teams	collaborating with relevant people to develop lease agreements and contracts and seeking specialist advice	2
Using mathematical ideas and techniques	analysing market and benchmarking data	2
Solving problems	addressing variations in compliance with lease agreements	1
Using technology	sourcing, collating and formatting data on spacial use	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Space may include:

- car parking
- buildings
- facilities
- properties
- lettable areas
- land

**Relevant people may include:**

- clients
- tenants
- supervisors/colleagues
- legal representatives
- site personnel
- industry professionals and associations
- property owners
- agents
- government personnel

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Clients may include:**

- property owners
- property agents
- tenants
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management
- bankers

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Relevant documentation may include:**

- contracts
- permits
- building codes
- licences
- specifications
- lease agreements
- plans
- maps
- spacial guidelines

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Variations may relate to:**

- changes to agreed terms for use of space
- changes to fittings and fixtures
- work outside or producing results outside the terms and conditions of contract

**Spacial guidelines may include:**

- building services corporation policy
- fit-out guidelines
- building codes
- industry practices
- industry trends

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining requirements for space use through an accurate assessment of client needs and identification of lease terms and conditions
- monitoring space use against contractual obligations including conducting regular user reviews and addressing variations in compliance and/or space usage
- recording and reporting an assessment of the efficient utilisation of space and securely maintaining all relevant documentation

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to lease arrangements, OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry practice and benchmarks
- risk management associated with property use
- contracts law and property use
- administration of property usage plans
- lease rights and responsibilities

**Required skills and attributes include:**

- communication skills to:
  - clarify ideas and perspectives
  - interpret written and oral information
  - negotiate client and tenant requirements
  - interpret property plans
  - complete documentation and report findings
- technical skills to:
  - use property use software
  - prepare and complete reports

## analytical skills to:

- interpret property plans
- analyse space use
- research space application and usage and benchmark for optimisation
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining space use requirements to reviewing space efficiency and reporting results
- evidence must include copies of documentation relating to at least two space monitoring processes including lease agreements and contracts, and reports of benchmarking activities and reviews

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD417A****Unit Descriptor****Monitor service requirements**

This competency standard specifies the outcomes required to build and maintain customer service relationships with tenants to effectively respond to service requests. It requires the ability to analyse and prioritise tenant service needs to determine appropriate action.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                  |  |
|----------------------------------|--|
| 1. Determine tenant requirements | <ul style="list-style-type: none"> <li>1.1 A professional rapport is established with <i>tenant</i> contacts to encourage an accurate and relevant exchange of information</li> <li>1.2 Communication protocols and points of contact for tenancy liaison services are clearly communicated to tenants</li> <li>1.3 Tenant <i>service requests</i> are handled in a professional manner and prioritised in accordance with <i>organisational and legislative requirements</i></li> <li>1.4 Tenant service requests are documented detailing time, location and nature of service in accordance with organisational requirements</li> </ul>   |
| 2. Review service requests       | <ul style="list-style-type: none"> <li>2.1 Service requests and timeframes are confirmed with <i>relevant people</i> in accordance with organisational requirements</li> <li>2.2 Services are reviewed to ensure compliance with contract specifications and allocated budget in accordance with organisational requirements</li> <li>2.3 Situations are analysed to determine risk factors referred to emergency services as required in accordance with organisational risk management procedures</li> <li>2.4 Service entries are checked and <i>feedback</i> sought from relevant people regularly to monitor tenant satisfaction</li> </ul>   |
| 3. Prepare progress reports      | <ul style="list-style-type: none"> <li>3.1 Draft progress report is prepared detailing tenancy liaison services requirements, costs and outcomes</li> <li>3.2 Meetings held with tenants allow non-conformance and quality issues to be discussed in an open and participative environment</li> <li>3.3 Records of tenant meetings, including suggestions for improvement to tenancy services and action plans, are incorporated into draft progress report</li> <li>3.4 Draft report is distributed to relevant people and feedback sought regarding improvements to the quality of tenancy liaison services</li> <li>3.5 Identified non-conformances that may impact on resource allocations are highlighted in progress report and referred to relevant people for future action</li> </ul> |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and discussing understanding of tenant expectations and service requirements with tenants, colleagues and/or supervisor	3
Collecting analysing and organising information	obtaining feedback on service delivery for review to improve future service provision	2
Planning and organising activities	prioritising and implementing arrangements to address the service needs of tenants	2
Working with others and in teams	working with property asset teams to ensure improved customer service to tenants	2
Using mathematical ideas and techniques	measuring tenant satisfaction	1
Solving problems	identifying and resolving tenant complaints and/or non-conformances, and recognising own limitations	2
Using technology	to schedule service calls	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Tenant may include the following users:**

- commercial
- retail
- hospitality
- industrial
- residential
- single or multiple with a known contact point in the premises

**Service requests may:**

- vary from those which are outside the terms of the service contract and require authorisation to proceed to those which are within the service contract and the level of authority designated to liaison personnel

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- relevant privacy laws
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Relevant people may include:**

- tenants
- property owners
- engineers and technicians
- technical experts
- sub-contractors
- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- agents
- government personnel

**Feedback may be sought from:**

- tenant meetings
- formal/informal performance appraisals
- comments from tenants, supervisors and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- consulting with tenants to determine service requirements
- responding to service requests promptly and determining appropriate action
- logging and reporting of service requests
- obtaining feedback on customer service from tenants and colleagues/supervisors

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry practice and benchmarks
- risk management associated with tenancy
- contracts law
- fundamentals of customer service
- lease rights and responsibilities
- standard operating procedures
- individual and collective tenancy service arrangements

**Required skills and attributes include:**

- communication skills to:
  - interpret written and oral information
  - interpret and clarify tenant service requirements
  - log service requests and prepare property asset service reports
  - use communication technologies including phone, fax, email
- self evaluation skills to:
  - assess and improve own performance
- analysis skills to:
  - interpret feedback and improve service
  - determine level of risk
  - identify and solve problems with property asset service requests
- interpersonal skills to:
  - develop and maintain a rapport with tenants
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from building customer service relationships with tenants and accurately interpreting tenant service requirements to seeking feedback on customer service processes and reporting outcomes
- evidence must include completed self-assessment tools used to evaluate own performance, feedback obtained from tenants and colleagues, and documentation from registers of service requests and tenant meetings

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD418A****Unit Descriptor****Advise on performance of asset**

This competency standard specifies the outcomes required to provide advice on current investments. It requires the ability to collect and analyse appropriate market and financial data from a range of sources and to provide advice to clients.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |  |
|---------------------------------------|--|
| 1. Determine client requirements      | <p>1.1 Consultative processes are used to determine and verify <i>client needs and expectations</i> in accordance with organisational requirements</p> <p>1.2 <i>Existing or potential issues</i> are identified and/or anticipated and analysed to determine impact on client requirements</p> <p>1.3 Specialist resources and <i>sources of information</i> are accessed and assessed in accordance with client and organisational requirements</p>  |
| 2. Research asset                     | <p>2.1 Information and data on client <i>assets</i> is gathered and organised in a format suitable for analysis and interpretation in accordance with organisational requirements</p> <p>2.2 <i>Source documents</i> are obtained and analysed to ensure that accessed information is reliable in accordance with legislative requirements</p> <p>2.3 Appropriate <i>interpersonal techniques</i> are used to obtain additional information in accordance with organisational and <i>legislative requirements</i></p> <p>2.4 Property trends and <i>market conditions</i> are identified and evaluated against <i>industry benchmarks</i> to determine performance of asset</p> <p>2.5 <i>Comparative market data</i> is accessed to enable valid conclusions on performance of asset to be made</p>                       |
| 3. Provide advice and recommendations | <p>3.1 Clients are provided with clear recommendations on whether performance of asset meets their identified needs</p> <p>3.2 <i>Advice and recommendations</i> are presented in a suitable format, style and structure using appropriate <i>business equipment/technology</i> and distributed to <i>relevant people</i></p> <p>3.3 <i>Feedback</i> on suitability and sufficiency of advice and recommendations is obtained in accordance with organisational requirements</p> <p>3.4 Limitations in providing objective advice to client is recognised <i>specialist advice</i> sought as required in accordance with organisational requirements</p> <p>3.5 Relevant documentation is securely maintained with due regard to client confidentiality in accordance with legislative and organisational requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations	2
Collecting analysing and organising information	sourcing, assessing and testing information on assets against client requirements	3
Planning and organising activities	conducting analysis on a range of assets to identify performance and trends	2
Working with others and in teams	receiving feedback on the effectiveness of client advice	1
Using mathematical ideas and techniques	calculating the performance of a range of assets and measuring against client requirements	1
Solving problems	addressing anticipated problems or complex client needs through the assistance of specialist advice	2
Using technology	sourcing, assessing and preparing client advice or recommendations	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- bankers

### Client expectations may relate to:

- immediate capital gains
- long-term capital gains

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Existing or potential issues may relate to:**

- ownership structure
- financial constraints
- residual life of assets
- tenancy possibilities
- maximum asset use
- supply and demand for asset type
- best use of asset

**Sources of property market information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes
- industry/organisational databases

**Assets may include:**

- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Source documents may include:**

- company asset documents and registers
- reports and inventories
- asset valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records



**Interpersonal techniques  
may relate to:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Legislative requirements  
may be outlined and  
reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Market conditions may  
relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Industry benchmarks may  
include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Comparative market data  
may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Advice and recommendations may relate to:**

- alternative asset management strategies
- disposal of asset
- tenancy mix strategy
- maintenance and/or repairs
- fit-out/construction/refurbishment

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Feedback may be obtained through:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues

**Specialist advice may be sought from:**

- valuers
- land economists
- developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations
- business consultants
- real estate agents

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- using appropriate techniques to verify client needs
- accessing and comparing a range of information and statistical data to determine performance of asset
- providing appropriate advice and recommendations to client regarding their asset/s
- following organisational and legislative procedures when giving advice

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- investment risk factors and relationship to return expectations
- a range of research methods and analysis techniques
- industry benchmarks
- alternative property uses
- asset lifecycles
- budgets and financial reporting
- ethical practices and relevant Codes of Conduct

**Required skills and attributes include:**

- literacy skills to:
  - interpret asset depreciation schedules
- technology skills to:
  - efficiently use financial and assessment software and spreadsheets
  - access market information
- organisational skills to:
  - use organisational filing systems
  - prepare advice and recommendations
- problem solving skills to:
  - determine factors which may affect depreciation of assets
- analytical skills to:
  - apply basic statistical methods and techniques
- research skills to:
  - source, analyse and interpret financial information
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - deal with stakeholders

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately determining client requirements to providing advice and recommendations regarding performance of asset
- evidence must include documentation showing how performance of assets were investigated, financial market information was gathered, evidence of advice and recommendations presented to clients

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD419A****Unit Descriptor****Occupy space**

This competency standard specifies the outcomes required to plan, monitor and complete the occupation of space. It requires the ability to monitor the fit-out and occupancy process, the scheduling of various operations to meet client needs, and the review of work performed.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Determine occupancy requirements     | <ul style="list-style-type: none"> <li>1.1 <i>Space</i> occupancy requirements are determined in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 Occupancy process, objectives and timelines are negotiated and agreed in consultation with relevant people</li> <li>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are gathered and reviewed to identify critical requirements of occupancy process</li> <li>1.4 Action plan is developed which details suitable activities that reflect <i>client</i> needs</li> <li>1.5 Special requirements of clients are identified and plans adjusted as required in accordance with organisational procedures</li> </ul>  |
| 2. Monitor occupation process           | <ul style="list-style-type: none"> <li>2.1 Occupation process is monitored to ensure it meets requirements of <i>tenancy guidelines</i> and relevant legislative and organisational requirements</li> <li>2.2 Monitoring processes including regular reviews with <i>users</i>, are reliable and make efficient use of time and <i>resources</i> in accordance with organisational requirements</li> <li>2.3 Appropriate <i>interpersonal techniques</i> are used to facilitate an accurate and relevant exchange of information</li> <li>2.4 Problems and delays are promptly communicated to relevant people and contingency plans implemented within an appropriate timeframe</li> <li>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 3. Review and record results of process | <ul style="list-style-type: none"> <li>3.1 Relevant documentation including certificates of occupancy are prepared and executed to confirm contractual or regulatory requirements as appropriate</li> <li>3.2 <i>Feedback</i> is used to confirm quality of performance and identify areas for improvement</li> <li>3.3 <i>Business equipment/technology</i> is used to access, record and organise information in accordance with relevant occupational health and safety (OHS) requirements</li> <li>3.4 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</li> </ul>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	advising problems and delays to clients and seeking feedback to review the occupation process	3
Collecting analysing and organising information	using documentation and relevant legislation to monitor fit-out requirements and space occupation process and identifying problems and delays	2
Planning and organising activities	scheduling, coordinating, monitoring and reviewing the space occupation process	2
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and receive feedback	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	identifying gaps in personal skills and knowledge	2
Using technology	using planning and scheduling software and preparing reports	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Space may include:**

- car parking
- buildings
- facilities
- properties
- lettable areas
- land

**Relevant people may include:**

- colleagues/supervisors
- users
- principals
- service providers
- builders
- architects
- clients
- legal representatives
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant documentation may include:**

- certificates of occupancy
- leases
- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Clients may include:**

- users
- property owners
- property agents
- tenants
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management

**Tenancy guidelines may cover:**

- permitted use
- material types and use
- access and egress
- building codes
- style of fit-out
- types of finish
- presentation

**Users may include:**

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- bankers
- company boards
- tenants
- clients

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Interpersonal techniques may relate to:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques



**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from clients and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- completing a space occupation under normal industry operating conditions in compliance with relevant industry and legal requirements
- implementing, monitoring and completing a fit-out process within designated timeframes
- reviewing and reporting of a space occupation, including analysis of feedback and suggesting improvements to future processes

**Required knowledge and understanding includes but is not limited to:**

- building codes and practices relating to fit-out
- planning and scheduling techniques and software
- industry practices and benchmarks for contracts and fit-out
- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- building construction practice
- basic knowledge of property contracts and administrative requirements

**Required skills and attributes include:**

- organisational skills to:
  - plan and arrange activities to occupy a space
  - schedule and meet timelines for fit-out and occupation
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements
  - communicate problems and delays
  - complete documentation and report findings
- technical skills to:
  - use planning and scheduling software
  - complete reports
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from planning space occupation requirements to monitoring the fit-out and reviewing and reporting on the occupation process
- evidence must include documentation of scheduling activities for at least two space occupations, and copies of lease or occupation agreements

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD420A****Unit Descriptor****Coordinate fit-out of property and facilities**

This competency standard specifies the outcomes required to coordinate the fit-out of premises for user occupation. It requires the ability to accurately interpret fit-out requirements, negotiate with selected contractors, and monitor the fit-out process to completion within agreed timeframes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                              |  |
|------------------------------|--|
| 1. Prepare for fit-out       | <p>1.1 <i>Information</i> is sourced and reviewed to accurately determine fit-out requirements in accordance with contract and <i>organisational requirements</i></p> <p>1.2 Required approvals are identified and confirmed to ensure fit-out compliance in accordance with <i>legislative requirements</i></p> <p>1.3 <i>Consultative processes</i> are used to coordinate and verify contracted parties' work schedules in accordance with organisational requirements</p> <p>1.4 Relevant <i>documentation</i> is reviewed to ensure accuracy and relevance of information and is disseminated to <i>relevant people</i> for <i>feedback</i></p>   |
| 2. Monitor fit-out processes | <p>2.1 Fit-out operation is monitored against work schedules to ensure completion occurs within designated timeframes</p> <p>2.2 Factors affecting the achievement of scheduled work are promptly identified and required <i>variations</i> to schedules are negotiated and agreed with relevant people</p> <p>2.3 Established <i>communication channels</i> and processes are used to ensure an accurate exchange of information throughout the fit-out operation</p> <p>2.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</p>  |
| 3. Finalise fit-out process  | <p>3.1 Notification of completed fit-out is received and checked against contract requirements and fit-out schedules in accordance with organisational and legislative requirements</p> <p>3.2 Inspection is arranged to confirm the fit-out is fully operational and meets specifications and industry standards</p> <p>3.3 Faults, errors or omissions are verified and prompt remedial action is determined and arranged with relevant people in accordance with organisational requirements</p> <p>3.4 <i>Business equipment/technology</i> is used to maintain relevant documentation in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating fit-out requirements and contractor arrangements	2
Collecting analysing and organising information	researching fit-out information and checking work performed against fit-out schedules and contract requirements	3
Planning and organising activities	planning, scheduling and coordinating fit-out processes	2
Working with others and in teams	collaborating with relevant people to coordinate fit-out arrangements and seeking specialist advice as required	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	appropriately addressing variations to contracts and work schedules	2
Using technology	planning and coordinating schedules, and maintaining documentation	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Information may be sought from:

- client
- project managers
- valuers
- architects
- planners
- designers
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Documentation may relate to:**

- fit-out schedule
- fit-out contract
- budget
- logs of equipment/system problems/faults
- warranty conditions and allowances
- operational checks and maintenance conducted
- costings, receipts, invoices
- property/facility leases, plans or contracts
- planning permits
- certifications
- inspection certificates
- handover

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- technical experts
- contractors
- consultants
- industry professionals and associations

**Feedback may be sought from:**

- comments from client, legal representatives, industry specialists, supervisors and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**Variations may include:**

- changes to fit-out schedules
- work outside or producing results outside the terms and conditions of contract

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Specialist advice may be sought from:**

- supervisor
- engineers
- property/facility managers
- valuers
- architects
- planners
- builders
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- ascertaining fit-out requirements through research of property/facility information and consultation with relevant parties
- monitoring a fit-out operation against work schedules and negotiating variations and adjustments to the schedules
- completing a fit-out in normal industry conditions and maintaining relevant documentation

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building construction practice, principles and processes
- a range of contracted parties and their roles and capabilities
- methods and techniques for monitoring project outcomes

**Required skills and attributes include:**

- research skills to:
  - source fit-out information and resource requirements
- organisational skills to:
  - plan and arrange fit-out work
  - schedule and meet timelines and client requirements
  - manage risk
- communication skills to:
  - interpret written and oral information
  - complete documentation
  - advise variations and adjustments to fit-out processes
- interpersonal skills to:
  - negotiate fit-out process
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities



**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting fit-out requirements to finalising fit-out completion documentation
- evidence must include at least two copies of fit-out work schedules and contracts including any variations, and completion certificates

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD421A****Unit Descriptor****Coordinate construction contracts**

This competency standard specifies the outcomes required to implement and monitor construction contracts. It requires the ability to effectively plan and document work activities, coordinate and monitor sub-contractors, and check and report completed work.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Determine construction contract requirements | <p>1.1 Construction requirements are reviewed and confirmed with <i>relevant people</i> as required in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Consultative processes</i> are used to negotiate and confirm construction requirements with contracted parties</p> <p>1.3 <i>Site access and specific site requirements</i> are identified and appropriate arrangements made as required in accordance with client, <i>legislative and organisational requirements</i></p> <p>1.4 Construction plan is prepared and <i>contingencies</i> planned to ensure contract and organisational requirements are met</p> <p>1.5 Additional <i>resource requirements</i> are identified in accordance with construction plan and budget</p> <p>1.6 Draft documentation is reviewed to ensure accuracy and relevance of information and is disseminated to relevant people for <i>feedback</i></p> |
| 2. Monitor construction contract                | <p>2.1 Construction plan is monitored against contracts and work schedules to ensure completion occurs within designated timeframes</p> <p>2.2 Site inspections are made on a regular basis so progress can be assessed and reported to relevant people</p> <p>2.3 Factors affecting the achievement of scheduled work are promptly identified and required <i>variations</i> to schedules are negotiated and agreed with relevant people</p> <p>2.4 Established <i>communication channels</i> and processes are used to ensure an accurate exchange of information throughout operation</p> <p>2.5 Situations requiring <i>specialist advice</i> are identified support sought as required in accordance with organisational requirements</p>  |
| 3. Check and record completed operation         | <p>3.1 A certificate of practical completion is received from contracted parties and checked against client and organisational requirements to finalise construction contract</p> <p>3.2 Inspection is arranged to confirm the construction meets contract requirements and industry standards</p> <p>3.3 Any defects are identified and prompt remedial action is arranged with relevant people in accordance with organisational requirements</p> <p>3.4 <i>Business equipment/technology</i> is used to maintain relevant <i>documentation</i> in accordance with legislative and organisational requirements</p>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating construction requirements	3
Collecting analysing and organising information	checking work performed against construction work schedules	2
Planning and organising activities	planning, scheduling and coordinating construction processes	3
Working with others and in teams	collaborating with relevant people to coordinate construction contracts and seeking specialist advice	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	1
Solving problems	identifying variations to work schedules	2
Using technology	using planning and scheduling software and using a computer to prepare reports	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- technical experts
- contractors
- consultants
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Site access and specific site requirements may include:**

- access and egress points
- time of access
- access codes
- keys, passes, security clearance
- union requirements
- OHS requirements
- building codes and regulations
- heritage listings
- noise control

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractors and consultants
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Resource requirements may include:**

- tools and equipment
- personal protective equipment
- materials
- tradesmen
- additional contractors
- subject experts
- transport

**Feedback may be sought from:**

- clients
- legal representatives
- industry specialists
- supervisors and/or colleagues
- government agencies

**Variations may include:**

- changes to work schedules
- changes to materials, fittings or fixtures
- work outside or producing results outside the terms and conditions of contract
- alternate suppliers/contractors

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- builders
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials
- supervisor

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications
- scanners

**Documentation may relate to**

- construction schedules
- construction contracts
- logs of equipment/system problems/faults
- warranty conditions and allowances
- operational checks and maintenance conducted
- costings, receipts, invoices
- property leases, plans or contracts
- planning permits
- certifications
- inspection certificates
- handover documentation

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining appropriate work schedules with contracted parties
- administering a construction contract in normal industry conditions
- identifying and organising appropriate documentation
- negotiating variations and adjustments to construction schedule

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- project planning methods and techniques
- building control legislation
- local zoning requirements
- building codes and relevant Australian Standards
- building construction practice, principles and processes
- a range of contracted parties and their roles and capabilities
- methods and techniques for monitoring project outcomes

**Required skills and attributes include:**

- research skills to:
  - source information and resource requirements
- organisational skills to:
  - plan and arrange construction work
  - schedule and meet timelines and client requirements
  - manage risk
- communication skills to:
  - interpret written and oral information
  - complete documentation
  - negotiate variations and adjustments to construction processes
- interpersonal skills to:
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting construction requirements to completing appropriate documentation
- evidence must include at least construction work schedules and contracts including any variations and completion certificates

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD422A****Unit Descriptor****Maintain asset management system**

This competency standard specifies the outcomes required to set up a system of asset control that applies to all property assets. It requires the ability to classify assets consistent with organisational requirements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                  |  |
|----------------------------------|--|
| 1. Determine system requirements | <p>1.1 <i>System</i> requirements are determined in accordance with business and operational plans and <i>organisational requirements</i></p> <p>1.2 Opportunities are given to <i>relevant people</i> to contribute to the identification of system requirements</p> <p>1.3 Recommendations on system requirements are presented in the required format, style and structure using relevant business equipment/technology</p> <p>1.4 Appropriate <i>interpersonal techniques</i> are used to obtain information from relevant people in accordance with organisational requirements</p> |
| 2. Classify assets               | <p>2.1 <i>Assets</i> are identified and classified in accordance with organisational procedures</p> <p>2.2 Assets are recorded in accordance with Australian Accounting Standards and <i>legislativerequirements</i></p> <p>2.3 Level of security and disclosure of financial statements is determined in accordance with organisational requirements</p> <p>2.4 Processes for classifying and recording assets are reliable and make efficient use of business technology and available time and resources in accordance with organisational requirements</p>                           |
| 3. Monitor and report            | <p>3.1 System effectiveness is monitored and evaluated to ensure it meets organisational and system requirements</p> <p>3.2 <i>Feedback</i> from client and colleagues is used to identify and develop improved systems</p> <p>3.3 Existing technology is assessed against newly available technology to determine needs and priorities</p> <p>3.4 All <i>asset information</i> is securely maintained with due regard to <i>client</i> confidentiality in accordance with organisational and legislative requirements</p>   |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sourcing and identifying system requirements and information from relevant people	2
Collecting analysing and organising information	using established processes to source and collate information and developing recommendations on system requirements	3
Planning and organising activities	scheduling, coordinating, monitoring and reviewing the asset management system	2
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and feedback	1
Using mathematical ideas and techniques	accessing and interpreting asset information	2
Solving problems	adapting information gathering activities to obtain additional data	2
Using technology	classifying, recording and formatting asset data	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Systems may be:**

- manual
- computer based

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- valuers

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Interpersonal techniques may include:**

- consultation methods
- seeking feedback
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences

**Assets may include:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- consumer protection
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings

**Asset information may relate to:**

- register of assets
- insurance
- residual life of assets
- property management reports
- maintenance schedules
- operating environment of organisation (financial markets, competitors, core business activities, functions, stakeholders)
- lines of responsibility
- key personnel
- reports and relevant documentation
- historical data

**Clients may include:**

- company or business enterprises
- property owners
- property agents
- project managers
- agents
- government and legal instruments/agencies
- private investors
- funds managers
- internal/external property groups
- insurers
- risk assessors
- legal advisers

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- ascertaining asset system requirements through analysis of business/operational plans and consultation
- classifying and recording assets using Australian Accounting Standards
- monitoring and improving systems using existing technology and obtaining feedback

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Australian Standards and legislation including Australian Accounting Standards
- relevant accounting record keeping standards, practice and codes
- relevant asset accounting record keeping manuals
- company record keeping policies and procedures

**Required skills and attributes include:**

- technology skills to:
  - use software packages to classify, record and monitor assets
  - select and use technology appropriate to the task
- literacy skills to:
  - read and understand a variety of information
  - interpret property asset records
- organisational skills to:
  - maintain records and databases
  - use organisational asset systems
- problem solving skills to:
  - solve routine database problems
  - source additional information if required
- analytical skills to:
  - analyse property asset records
  - classify assets
- interpersonal skills to:
  - liaise with relevant people to obtain asset information
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying system requirements to classifying, recording and monitoring a range of company assets
- evidence must include a database of asset information which has been updated, evidence of information which has been checked for accuracy, and feedback obtained on appropriateness and sufficiency of information

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD423A****Unit Descriptor****Arrange valuation of facilities and assets**

This competency standard specifies the outcomes required to place a value on facilities and assets. It requires the ability to assess, record, report and analyse information on facilities and assets. This competency also requires a knowledge of basic accounting procedures to determine the market value of facilities and assets.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Research facility/asset                       | <p>1.1 Information and data on <i>client</i> facility and/or <i>asset</i> is gathered and organised in a format suitable for analysis and interpretation in accordance with <i>organisational requirements</i></p> <p>1.2 Methods for gathering information are reliable and make efficient use of time and resources in accordance with organisational requirements</p> <p>1.3 Appropriate <i>interpersonal techniques</i> are used to access additional information from <i>relevant people</i></p> <p>1.4 <i>Source documents</i> are obtained and analysed to determine status and ownership of asset in accordance with <i>legislative requirements</i></p>   |
| 2. Arrange assessment of value of facility/asset | <p>2.1 Appropriate valuation specialists are arranged to provide valuation advice in accordance with organisational requirements</p> <p>2.2 Market value of facility/asset is assessed and determined in accordance with established instructions and organisational procedures</p> <p>2.3 <i>Comparative market data</i> is accessed to enable a valid assessment of facility/asset value to be made</p> <p>2.4 Estimation of value is clear, justified and based on assessment of all factors in accordance with organisational procedures</p> <p>2.5 Limitations in determining value of facility/asset are recognised and <i>specialist advice</i> sought as required in accordance with organisational requirements</p> |
| 3. Present information                           | <p>3.1 Information on value of facility/asset is presented within specified time, budget and quality constraints in accordance with client and organisational requirements</p> <p>3.2 Information is prepared in the required format, style and structure using relevant <i>business equipment/technology</i></p> <p>3.3 <i>Feedback</i> on suitability and sufficiency of advice is obtained and, where appropriate, incorporated into advice</p> <p>3.4 All facility/asset <i>information</i> is securely maintained with due regard to client confidentiality in accordance with organisational and legislative requirements</p>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	presenting facility/asset valuations which incorporate obtained feedback	2
Collecting analysing and organising information	using established processes to source and analyse information and prepare valuations on facility/asset	3
Planning and organising activities	scheduling, coordinating and undertaking facility/asset valuation tasks	2
Working with others and in teams	collaborating with colleagues and supervisors to obtain advice and receive feedback	1
Using mathematical ideas and techniques	accessing, interpreting and analysing facility/asset information and estimating values	2
Solving problems	adapting information gathering activities to obtain additional data	2
Using technology	formatting and maintaining facility/asset data	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- company or business enterprises
- property owners
- property agents
- project managers
- agents
- government and legal instruments/agencies
- private investors
- funds managers
- internal/external property groups
- insurers
- risk assessors
- legal advisers

**Assets may relate to:**

- property/facilities
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- valuers
- accountants
- taxation specialists

**Source documents may include:**

- company asset documents and registers
- reports and inventories
- asset valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records



**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- consumer protection
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Specialist advice may be sought from:**

- valuers
- accountants
- taxation specialists
- investment consultants
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings

**Information may relate to:**

- insurance
- property/facility/asset management reports
- useful and residual life of asset
- maintenance schedules
- operating environment of organisation (financial markets, competitors, core business activities, functions, stakeholders)
- property/facility/asset leases and contracts
- reports and relevant documentation
- historical data

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- researching and analysing asset information to clarify status and ownership of facility/asset
- determining market value of facility/asset using market data and established accounting procedures
- presenting facility/asset valuation in a clear and comprehensive format

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Australian Standards and legislation including Australian Accounting Standards
- relevant accounting record keeping standards, practice and codes
- relevant facility/asset accounting record keeping manuals
- company record keeping policies and procedures

**Required skills and attributes include:**

- analysis and interpretation skills to:
  - ensure collection of valid and reliable data
  - assess market information
  - determine value of facility/asset
- literacy skills to:
  - read and interpret a variety of information
  - collate and prepare required documentation
- research and evaluation skills to:
  - identify gaps in data
  - source additional information if required
- interpersonal skills to:
  - liaise with relevant people to obtain asset information
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from sourcing facility/asset information and market data to determining facility/asset value and presenting advice
- evidence must include at least two facility/asset valuations including evidence of information which has been sourced and checked for accuracy, and feedback obtained on appropriateness and sufficiency of information

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD424A****Promote process improvement****Unit Descriptor**

This competency standard specifies the outcomes required to research and implement improvement processes to reduce costs and improve quality services. It requires the ability to promote the use and implementation of innovative work practices to affect change.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Identify opportunities for improvement | <p>1.1 <i>Work practices</i> and procedures are analysed to determine <i>opportunities for improvement</i> in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Business equipment/technology</i> is used to gather and organise information in a format suitable for analysis</p> <p>1.3 <i>Consultative processes</i> are used to actively encourage <i>feedback</i> from colleagues and clients to identify opportunities for improvement</p> <p>1.4 <i>Opportunities for improvement</i> are assessed against organisational business goals and objectives</p>   |
| 2. Determine change requirements          | <p>2.1 The purpose of <i>change</i>, objectives and timelines are negotiated and agreed in consultation with <i>relevant people</i></p> <p>2.2 <i>Risk factors</i> likely to affect change are analysed to identify potential constraints</p> <p>2.3 An improvement plan is developed that details a range of suitable activities that accurately reflect change requirements</p> <p>2.4 Roles, responsibilities and accountabilities for the change process are established in accordance with improvement plan</p> <p>2.5 <i>Communication channels</i> are used to clearly and promptly promote objectives of change to relevant people in accordance with organisational requirements</p>   |
| 3. Implement and monitor change processes | <p>3.1 <i>Leadership styles</i> and methods are used to provide clear direction and support to individuals and teams throughout change process</p> <p>3.2 <i>Future support</i> services required for change processes are identified and delivery planned in consultation with relevant people</p> <p>3.3 Suitable organisational systems and technology are used to systematically monitor change processes to ensure consistency with improvement plan</p> <p>3.4 Feedback and comments on change processes are obtained and analysed in accordance with organisational procedures</p> <p>3.5 <i>Evidence and information</i> on impact of change are documented and distributed to relevant people in accordance with organisational requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining requirements for process improvement and communicating with members of the work team	2
Collecting analysing and organising information	assessing information and risks and setting goals and objectives	2
Planning and organising activities	promoting change and developing improvement plans	3
Working with others and in teams	in completing scheduled tasks and implementing change	2
Using mathematical ideas and techniques	measuring impact of change and calculating resource costings	2
Solving problems	identifying problems with implementation of change and identifying risk factors that may affect anticipated project outcomes	2
Using technology	managing scheduling of tasks and for reporting outcomes	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Work practices may relate to:**

- undertaking research
- engaging clients
- securing custom
- conducting appraisals
- providing support within the organisation
- undertaking routine functions
- promoting the organisation and its services
- implementing, promoting and reviewing processes

**Opportunities for improvement may include:**

- coaching, mentoring and/or supervision
- internal/external training provision
- personal study
- workplace skills assessment
- recognition (RPL/RCC/initial assessment)
- formal/informal learning programs
- work experience/exchange/opportunities
- career planning/development
- performance appraisals

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Consultative processes may include:**

- face-to-face meetings
- use of bulletins, staff memos
- telephone, facsimile and written communication
- email communication

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**Opportunities for improvement may be assessed for:**

- cost effectiveness
- ability to add value
- ability to improve customer satisfaction
- practicality
- viability
- ease of implementation
- degree of management support

**Change may include:**

- implementation of new work practices and/or services
- organisational restructures
- introduction of new technology
- change in work location
- new client base
- staffing changes
- job role changes
- work priorities

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations

**Risk factors that may impact on change may include:**

- technological advances
- safety and security issues
- changes to government policy
- staffing requirements
- level of expertise
- time constraints
- budget constraints

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Leadership styles and methods may include:**

- techniques for initiating action and directing decision making
- strategies for presenting a confident, assured and unhesitant manner in challenging situations
- strategies for not accepting unreasonable expectations
- maintaining ethical practice and beliefs in the face of opposition
- modelling behavioural and personal presentation standards
- time management
- strategies for acknowledging and respecting the attitudes and beliefs of others
- techniques for promoting active and genuine participation

**Future support services may relate to:**

- guidance
- counselling
- coaching
- additional resources
- training

**Evidence and information may include:**

- customer surveys
- employee satisfaction
- industrial disputes
- supplier feedback
- productivity measures
- cost savings
- market share data

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying opportunities for improving processes through an accurate assessment of work practices, information gathering and consultation
- assessing opportunities for improvement against business goals and objectives
- determining change requirements through development of an improvement plan incorporating an analysis of risk
- implementing and monitoring change using organisational systems and technology, and documenting and reporting the results

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- common effects of change and innovation in the workplace
- industrial and organisational context of change
- organisational policies, plans, procedures and structure
- processes to interpret and apply feedback
- principles and techniques of goal setting and recording priorities
- principles of negotiation
- limitations of work role, responsibility and professional abilities
- OHS issues and requirements
- EEO, equity and diversity principles



**Required skills and attributes include:**

- planning skills to:
  - schedule work activities and priorities
- leadership skills to:
  - implement process improvement
  - provide leadership to the team during change process
- literacy skills to:
  - read and understand a variety of texts
  - prepare general information and papers according to target audience
  - spell with accuracy and use grammar and punctuation effectively as an aid to understanding
- analytical skills to:
  - identify opportunities for improvement
  - monitor effects of change
- technology skills to:
  - prepare and present information
  - prepare reports on process improvements
- interpersonal skills to:
  - develop a rapport with customers
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying opportunities for improvement to processes to implementing and monitoring processes for change
- evidence must include documentation of at least two process improvement plans including risk analysis and incorporation of feedback

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD425A****Select and appoint contractors****Unit Descriptor**

This competency standard specifies the outcomes required to coordinate the contractor requirements for a variety of projects. It requires the ability to administer contracts and coordinate the selection and monitoring of contractor arrangements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                     |   |
|-------------------------------------|---|
| 1. Determine selection requirements | <ul style="list-style-type: none"> <li>1.1 Selection purpose and context are discussed with <i>relevant people</i> to determine selection requirements</li> <li>1.2 Selection <i>information</i> is gathered to assist in understanding the <i>selection process</i> and <i>types of contractors</i> required</li> <li>1.3 Draft selection documentation is prepared and presented to relevant people to check the information is accurate and clearly addresses contract requirements</li> <li>1.4 Selection processes and timelines are negotiated and agreed with relevant people in accordance with <i>organisational requirements</i></li> </ul>   |
| 2. Arrange selection process        | <ul style="list-style-type: none"> <li>2.1 Selection process and criteria comply with all organisational and <i>legislative requirements</i></li> <li>2.2 Relevant people involved in the selection process are nominated and organised in accordance with organisational requirements</li> <li>2.3 <i>Selection criteria</i> are written in a clear, concise manner and comply with relevant legislative and organisational format requirements</li> <li>2.4 Selection processes are reliable and make efficient use of available time and resources in accordance with organisational requirements</li> <li>2.5 <i>Business equipment/technology</i> is used to gather and organise evidence in a format suitable for analysis and interpretation</li> </ul>  |
| 3. Assess and select contractors    | <ul style="list-style-type: none"> <li>3.1 Assessment and selection process is conducted in accordance with organisational procedures</li> <li>3.2 Information obtained from each contractor is judged against specified selection criteria in accordance with organisational requirements</li> <li>3.3 Appropriate <i>interpersonal techniques</i> are used to develop a professional relationship which reflects sensitivity to individual differences</li> <li>3.4 Contractor preferences, needs and expectations are clarified and addressed using appropriate <i>consultative processes</i></li> <li>3.5 Selection decision is based on evaluation of sufficient evidence to enable a judgement to be made on the best candidate</li> <li>3.6 Personal limitations in interpreting selection criteria or making selection decision are identified and <i>appropriate support</i> sought as required</li> </ul> |

4. Record and report results
- 4.1 Selection decisions are recorded and reported accurately in accordance with legislative and organisational requirements
  - 4.2 Clear and constructive *feedback* is provided to candidates regarding the outcomes of the selection process and guidance on future options
  - 4.3 Relevant documentation is completed and processed in accordance with legislative and organisational procedures
  - 4.4 Selection process is reviewed against established criteria in consultation with relevant people to improve and modify future assessment practices

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining selection requirements, processes and timelines through discussion with relevant people	2
Collecting analysing and organising information	sourcing and analysing contractor requirements to determine types of contractors required	2
Planning and organising activities	developing selection criteria and timelines	2
Working with others and in teams	arranging and conducting selection process with relevant parties	3
Using mathematical ideas and techniques	allocating resources and evaluating evidence	1
Solving problems	addressing anticipated problems or complex contractor needs	2
Using technology	preparing recommendations and selection report	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Relevant people may include:**

- specialist consultants
- investors
- financial institutions
- builders
- architects
- engineers and technicians
- surveyors
- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- agents
- government personnel

**Information may relate to:**

- selection criteria
- project terms and conditions
- relevant project contracts
- budgets and operating costs
- company services
- policy/management procedures
- current and planned property/site developments
- land title documentation
- legal documentation
- deposited, survey and other plans
- tenancy and other contracts
- property drawings

**Selection processes may include:**

- open quotations
- tendering (both complying and non-complying)
- advertisement
- register of consultants
- direct appointment

**Types of contractors may include:**

- one or multiple builders
- one or multiple service providers

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Selection criteria may relate to:**

- financial security
- demonstrated capacity to perform
- current work load
- quality of sub-contractors
- performance record
- contractor philosophy
- technical capability

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Appropriate support may be sought from:**

- supervisor
- colleagues
- legal representatives
- property specialists including architects, surveyors, engineers, property managers, real estate agents, lawyers, local government personnel, industry consultants

**Feedback may be sought from:**

- comments from client, legal representatives, industry specialists, supervisors and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- ascertaining contractor requirements through research and consultation
- preparing selection schedule and criteria, and arranging people to be involved in the selection process
- conducting the assessment and selection of contractors using appropriate selection criteria and communication techniques
- completing the selection of contractors including the reporting of recommendations and reviewing criteria

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- regulations and legislation affecting property investments
- building construction practice, principles and processes
- contract law applied to property contracts
- contractor roles and capabilities
- market conditions affecting property investments

**Required skills and attributes include:**

- research skills to:
  - source selection information and resource requirements
- organisational skills to:
  - plan and arrange selection process
  - schedule and meet timelines
- communication skills to:
  - conduct assessment and selection process
  - interpret written and oral information
  - complete documentation
- decision making skills to:
  - make recommendations on selection of contractor
- interpersonal skills to:
  - negotiate selection process
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting selection requirements to undertaking the selection process and making recommendations on an appropriate contractor
- evidence must include at least two copies of selection documentation including criteria, timetables and contracts

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD426A****Unit Descriptor****Manage conflict and disputes**

This competency standard specifies the outcomes required to use communication techniques to manage and resolve conflict and disputes. It requires the ability to assess conflict/dispute situations, accurately receive and relay information, adapt interpersonal styles and techniques to varying social and cultural environments, and evaluate responses.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                            |   |
|----------------------------|---|
| 1. Assess conflict/dispute | <p>1.1 <i>Conflict/dispute</i> is identified and responses evaluated in accordance with <i>organisational and legislative requirements</i></p> <p>1.2 Causes of conflict/dispute are accurately recognised and appropriate responses identified to prevent escalation in accordance with organisational procedures</p> <p>1.3 Effective observation and active listening skills are used to elicit and interpret verbal and non-verbal information</p> <p>1.4 Effective <i>communication techniques</i> are used to ensure an accurate exchange of information</p> <p>1.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</p>   |
| 2. Negotiate resolution    | <p>2.1 Conflict/dispute is negotiated and resolved constructively using strategies that comply with established organisational procedures</p> <p>2.2 <i>Negotiation techniques</i> are used to maintain positive interaction, divert and minimise aggressive behaviour</p> <p>2.3 Communication with others is conducted in a courteous manner which reflects sensitivity to individual, <i>social and cultural differences</i> in accordance with organisational requirements</p> <p>2.4 Contradictions, ambiguity, uncertainty or misunderstandings are identified and clarified in accordance with organisational procedures</p> <p>2.5 Factors that might impact on the safety or security of <i>clients/colleagues</i> are identified and appropriate responses or <i>contingency measures</i> are formulated and/or implemented</p> |
| 3. Evaluate response       | <p>3.1 Effectiveness of response is evaluated and reviewed in accordance with legislative and organisational requirements</p> <p>3.2 Response evaluation findings are organised in a format suitable for analysis in accordance with organisational requirements</p> <p>3.3 Incident observations are provided in an accurate, concise and constructive manner when reviewing and debriefing situations</p> <p>3.4 <i>Business equipment/technology</i> is used to prepare records and reports in accordance with applicable occupational health and safety (OHS), legislative and organisational requirements</p> <p>3.5 All information is securely maintained with due regard to confidentiality, legislative and organisational requirements</p>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	using interpersonal techniques to elicit information and negotiate resolution to conflict/dispute	3
Collecting analysing and organising information	identifying and interpreting organisational and industry policies and procedures for conflict/dispute management	2
Planning and organising activities	negotiating to resolve conflict/dispute and organising support services	2
Working with others and in teams	consulting with clients/colleagues to assist conflict/dispute resolution and ensure safety and security of others if necessary	2
Using mathematical ideas and techniques	estimating resource requirements	1
Solving problems	identifying contradictory or ambiguous information to prevent misunderstandings	3
Using technology	preparing formal records and reports	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Conflict/dispute situations may include:

- arguments and disagreements
- persons with criminal intent
- persons under the influence of intoxicating substances
- refusals to follow directions and guidance
- conflict/disputes between staff/members of the public
- ejection of persons
- accidents resulting in injury
- riots, demonstrations
- destruction of property
- persons suffering from emotional distress or mental illness
- situations affecting the security of self, others or property

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative, financial and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices laws and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Communication techniques may include but are not limited to:**

- active listening
- using open and/or closed questions
- speaking clearly and concisely
- using appropriate language and tone of voice
- giving customers full attention
- maintaining eye-contact (for face-to-face interactions)
- non-verbal communication (eg body language and personal presentation for face-to-face interactions)
- clear, legible writing

**Specialist advice may be sought from:**

- supervisors
- colleagues
- clients
- counsellors
- health and safety personnel
- emergency personnel
- industry professionals and associations
- legal representatives

**Negotiation techniques should include, but are not limited to:**

- using strategic questioning and listening to gather information and direct the focus of people involved
- use of positive, confident and cooperative language
- control of tone of voice and body language
- using language and concepts appropriate to the people involved
- using clear presentation of options and consequences
- demonstrating flexibility and willingness to negotiate
- using summarising of positions and agreements to move understanding

**Social and cultural differences may be expressed in:**

- language (verbal, non-verbal, written)
- traditional practices and observations
- beliefs, values, practices
- food, diet
- dress
- religious and spiritual observances
- social conventions
- cultural stereotypes
- conventions of gender/sexuality

**Clients may include:**

- strata companies
- property owners
- property agents
- tenants
- building supervisors
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management
- insurers

**Contingency measures may include:**

- separation/isolation
- defusing strategies
- counselling
- specialists/experts
- intervention
- mediation
- first-aid
- selecting alternative actions which may require use of force within legal requirements
- special watch
- cultural support

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Records and reports may include:**

- organisational forms
- incident reports
- logs/journals
- running sheets
- task allocation sheets
- records of conversation
- written/computer-based information
- radio/telephone records

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- using communication techniques to accurately identify causes and incidences of conflict/dispute, and effectively evaluating responses
- negotiating conflict/dispute situations to an effective resolution where possible
- evaluating response process and accurately recording and reporting facts and outcomes

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- organisational business structure, products and services
- the organisational policies and procedures for property services including handling of complaints
- negotiation strategies
- conflict/dispute resolution techniques and procedures
- consultation methods, techniques and protocols
- techniques for dealing with people with special needs

**Required skills and attributes include:**

- language skills to:
  - allow for adequate communication
- negotiation skills to:
  - support people involved in conflict/dispute
  - negotiate agreement of all parties to conflict/dispute
  - resolve conflict/dispute
- problem solving skills to:
  - identify causes and incidences of conflict/dispute
  - determine contingency responses
- evaluation skills to:
  - assess appropriate responses to conflict/dispute
  - assess effectiveness of conflict/dispute resolution processes
- technology skills to:
  - prepare and present records and reports
- interpersonal skills to:
  - adapt personal styles to suit conflict/dispute situation
  - consult and negotiate in a culturally sensitive and appropriate manner
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately identifying causes of conflict/dispute, to negotiating resolution, and recording and reporting outcomes
- evidence must include records and reports of conflict/dispute situations including documentation showing how communication and consultation techniques were used to negotiate and evaluate conflict/dispute resolution

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



## PRDPOD427A

## Assess and implement strata /community management agreement

### Unit Descriptor

This competency standard specifies the outcomes required to effectively assess and implement a strata/community management agreement. It requires the ability to negotiate the implementation of the agreement, and monitor and review the implementation process.

### Unit Sector

Property operations and development

### ELEMENT

### PERFORMANCE CRITERIA

1. Determine client and agreement requirements
  - 1.1 Management agreement and *client needs* are reviewed to establish implementation requirements in accordance with *organisational requirements*
  - 1.2 *Owner responsibilities*, management fees and implementation requirements are negotiated and confirmed with *relevant people* in accordance with organisational requirements
  - 1.3 *Legislative, ethical and procedural requirements* relevant to strata/community management *services* are identified and accessed in accordance with client needs and organisational requirements
  - 1.4 Registered plans are reviewed to ensure accuracy and relevance of information and are disseminated to relevant people for *feedback*
  - 1.5 Specific insurance requirements are identified and appropriate arrangements made as required in accordance with client, organisational and legislative requirements
  - 1.6 Appropriate security arrangements for the management of property/facilities are identified and applied in accordance with organisational and legislative requirements
  - 1.7 Additional *resource* requirements are determined in accordance with management agreement and budget allocations
2. Implement and monitor agreement
  - 2.1 Implementation progress is systematically monitored and variations to work schedules verified with relevant people in accordance with organisational requirements
  - 2.2 Expenditure and resource usage is monitored and recorded to ensure implementation objectives are achieved within budget parameters
  - 2.3 Common property/facilities are maintained and protected in accordance with management agreement
  - 2.4 Insurance claims and payments are managed in accordance with management agreement and statutory requirements
  - 2.5 Meetings are scheduled and managed in accordance with management agreement and statutory requirements
  - 2.6 Appropriate practices for receiving and handling monies are identified and applied in accordance with organisational and legislative requirements
  - 2.7 Repair and maintenance of buildings and facilities is arranged in accordance with management agreement and statutory agreement

3. Maintain records
  - 3.1 *Record management systems* are maintained in accordance with organisational and legislative requirements
  - 3.2 Books of accounts are maintained to accurately reflect relevant transactions and collections of contributions
  - 3.3 *Records and reports* provide an accurate and timely record of transactions and services provided
  - 3.4 Service contracts are produced which provide an accurate record of facilities management and agency trust account disbursements
  
4. Review and report on implementation of agreement
  - 4.1 Implementation processes and outcomes are reviewed and reported in consultation with relevant people using appropriate communication techniques
  - 4.2 Suitability of insurance arrangements is reviewed to ensure compliance with agreement requirements in accordance with legislative and organisational requirements
  - 4.3 Recommendations for improving processes are presented to relevant people in accordance with organisational procedures
  - 4.4 *Business equipment/technology* is used to maintain *relevant documentation* in accordance with applicable occupational health and safety (OHS) and organisational procedures
  - 4.5 Report is distributed promptly to relevant people in accordance with client and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting to ascertain client requirements and implementation requirements	2
Collecting analysing and organising information	compiling, documenting and reporting implementation outcomes	2
Planning and organising activities	scheduling and monitoring implementation to complete within established timeframes	3
Working with others and in teams	collaborating with relevant people to obtain feedback on work schedules and accuracy and relevance of information	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	identifying gaps in personal skills and knowledge, and addressing variations to work schedules	2
Using technology	accessing information, documenting and maintaining records	1

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- strata companies
- potential and existing owners
- prospective and existing tenants
- owners corporations/body corporate and community title groups
- agents/third parties for owners
- in-house staff and office contractors

**Client needs may relate to:**

- communication (verbal, non-verbal)
- language (English, NESB)
- cultural practices and observations
- beliefs, values
- religious and spiritual observances
- social conventions
- cultural stereotypes
- physical/mental disabilities
- conventions of gender/sexuality
- disposable income/financial restraints
- environmental considerations

**Organisational requirements may be outlined and reflected in:**

- agency policies/guidelines
- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- sales, marketing and leasing/management procedure manuals
- policies and procedures in relation to client service
- legal and organisational policies/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice such as:
  - acting in principal's best interests
  - misrepresentation
  - over servicing, fixed charges rather than fee for service
  - declaration of beneficial interest
  - clear communication of services offered and fee for service
  - clear negotiation of fees
  - complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Owner responsibilities may include:**

- budgeting
- maintenance of cash flow
- appropriate levies
- building maintenance requirements
- administrative and sinking funds

**Relevant people may include:**

- supervisors
- colleagues
- clients
- legal representatives
- industry professionals and associations
- consumers
- government personnel

**Legislative, ethical and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices laws and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Services may relate to:**

- residential and commercial/industrial property
- property and facilities management across a range of property types

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Resources may relate to:**

- tools and equipment
- materials
- personnel
- training
- transport

**Record management systems may relate to:**

- strata levies
- trust accounting
- repairs
- investments
- administrative and sinking funds
- by-laws

**Records and reports may include:**

- organisational forms
- logs/journals
- running sheets
- task allocation sheets
- records of meetings
- written/computer-based information
- radio/telephone records
- completed repairs and maintenance

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Relevant documentation may relate to:**

- organisational, industry and other contracts
- titles
- property marketing, sale and lease agreements/contracts
- tenancy agreements
- permits
- building codes
- licences
- specifications
- plans
- maps

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- establishing and negotiating agreement requirements through consultation and research including:
  - security arrangements for management of property and facilities
  - management fees and services offered
  - owners responsibilities and expectations
  - factors likely to affect the management of property
  - omissions or errors within agreement
  - necessary record keeping practices
- implementing and monitoring agreement including:
  - depositing monies held on behalf of owners corporation
  - maintaining and protecting condition of common property
  - liaising with owners/tenants about repairs and maintenance
  - maintaining relevant statutory records and books
  - arranging, managing and recording meetings
  - managing insurance claims and payments
  - responding appropriately to requests for repairs and maintenance
- maintaining relevant statutory records and books including:
  - strata levies
  - trust accounting
  - repairs and maintenance
  - investments
  - administrative and sinking funds
  - by-laws
- meetings
- reviewing and reporting on agreement outcomes including consultation with owners/tenants

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, social and ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- relevant legislation and statutes affecting body corporate services and strata title 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
- management of administration and sinking funds
- Commonwealth/State/Territory consumer protection and trade practices legislation with regard to property transactions
- relevant legislation that affects management of property, especially residential property
- relevant Acts and regulations
- limitations of work role, responsibility and professional abilities
- administration of property usage plans
- lease rights and responsibilities

**Required skills and attributes include:**

- communication skills to:
  - public presentation
  - interpret written and oral information
  - negotiate and confirm work schedules
- technical skills to:
  - complete documentation
  - prepare reports
- analytical skills to:
  - prepare costings and budgets
  - interpret agreement
  - evaluate processes
- organisational skills to:
  - trust accounting and bookkeeping
  - property inspections
  - arrange and monitor implementation process
  - organise work schedules and timelines
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - respect individual differences

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining implementation requirements to reviewing and reporting on management agreement implementation outcomes
- evidence must include copies of documentation relating to at least two management agreement implementation processes, including work schedules and reports of outcomes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD501A****Unit Descriptor****Coordinate risk management system**

This competency standard specifies the outcomes required to develop, implement and evaluate a risk management system to ensure effective operations. It requires the ability to determine system requirements and identify and organise appropriate support processes to implement the system.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                  |   |
|----------------------------------|---|
| 1. Determine system requirements | <p>1.1 <i>Risk management context</i> and strategies are determined and promoted to <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.2 Relevant <i>documentation</i> and <i>legislative requirements</i> are reviewed to identify critical requirements of risk management strategy</p> <p>1.3 <i>Resource requirements</i> to facilitate achievement of risk management goals and objectives are identified and arranged</p> <p>1.4 <i>Roles, responsibilities and accountabilities</i> for implementation of risk management activities are established in accordance with risk management strategy</p> <p>1.5 Consultative processes are used to determine individual <i>professional development requirements</i> in accordance with organisational requirements</p>                 |
| 2. Organise support processes    | <p>2.1 Risk management processes which require specialist support are identified and personnel/finance support sought as required in accordance with organisational requirements</p> <p>2.2 Systems to encourage <i>communication</i> flow and feedback are established and maintained to ensure an accurate exchange of information between relevant people</p> <p>2.3 Administrative processes are analysed to ensure outcomes are accurately reported and recorded in accordance with organisational requirements</p> <p>2.4 <i>Assessment criteria</i> for measuring level of <i>potential or existing risk</i> and assessment of consequences is developed in accordance with <i>terms of reference</i></p>  |
| 3. Monitor and maintain system   | <p>3.1 Risk management system is systematically evaluated to maintain consistency and meet relevant legislative and organisational requirements</p> <p>3.2 <i>Factors affecting achievement of risk management strategies</i> are identified, and required variations negotiated and agreed with relevant people</p> <p>3.3 Information, costs and statistics relating to risk management system are collected and <i>analysed</i> in accordance with organisational requirements</p> <p>3.4 <i>Audits</i> for compliance for treatment of risks are undertaken in accordance with risk management system requirements</p> <p>3.5 Changes to operating environment, risk or threat to assets are monitored on an ongoing basis and corrective measures identified and implemented in accordance with risk management plan</p> |

4. Review and report on system
- 4.1 Risk management plan is reviewed against established criteria in consultation with relevant people to improve and modify future risk assessment practices
  - 4.2 *Evaluation* processes incorporate strategies for review, evaluation and comparison of risk management strategies and processes in accordance with risk management plan
  - 4.3 Collection and analysis of *feedback* from relevant people regarding satisfaction with risk assessment practices is included in evaluation process
  - 4.4 A *business continuity plan* covering all aspects of continuity cycle is developed and provided to relevant people for comprehensive analysis
  - 4.5 Findings of analysis are incorporated into business continuity plan in accordance with organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	understanding the operating environment	3
Collecting analysing and organising information	gathering information from reliable sources to determine potential or existing risks	3
Planning and organising activities	developing criteria to use as a basis for measuring the level of risk	2
Working with others and in teams	establishing and maintaining accurate communication flows	2
Using mathematical ideas and techniques	analyse risk management data	3
Solving problems	identifying contingency requirements to minimise loss in the event of risk realisation	3
Using technology	sourcing, organising, recording and presenting information in suitable formats	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Risk management context may relate to:**

- business operations
- economic climate
- previous history of organisational operations
- competitors
- human and physical assets of organisation
- organisational strengths and weaknesses

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- ethical standards, codes of practice
- occupational health and safety (OHS) policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Relevant people may include:**

- internal/external specialists in risk management
- sub-contractors
- supervisors
- colleagues
- clients
- emergency personnel
- OHS representatives
- legal representatives
- industry professionals and associations
- tenants
- property owners
- agents
- government personnel

**Documentation may relate to:**

- risk register
- checklists
- audit tools and schedules
- resource lists

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resource requirements may include:**

- information in paper-based or electronic format
- risk analysis tools
- briefings, information sessions, training

**Roles, responsibilities and accountabilities may be influenced by:**

- job description and employment arrangements
- organisational policy relevant to work role
- team structures
- supervision requirements including OHS
- skills, training and competencies
- codes of conduct

**Professional development requirements may relate to:**

- formal/informal learning programs
- work rotation to facilitate changing work priorities
- utilisation of existing strengths to focus future career development
- coaching, mentoring and/or supervision
- updating/maintaining knowledge base on current issues for work/professional practice
- identifying and establishing new career paths

**Communication may include using channels such as:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Assessment criteria may be based on:**

- qualitative factors
- quantitative factors
- semi-quantitative factors
- organisational or client requirements
- Australian Risk Management Standards

**Potential or existing risk may be/relate to:**

- deliberate, natural, accidental, perceived
- commercial and legal relationships
- loss, disclosure, destruction or compromise of asset
- loss of goodwill, reputation or credibility
- public liability
- unpredictable asset performance
- industry special risks
- machinery malfunction
- loss of profits
- trade practices issues
- OHS

**Terms of reference may relate to:**

- operational environment
- roles and responsibilities
- security and other clearances
- limitations and exclusions
- scale of the task/assessment (whether a full-scale operation, or limited to a particular section or operation of the company)
- client expectations
- cost
- agreed timeframe

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert review
- cost data analysis

**Factors affecting the achievement of risk management strategies may relate to:**

- availability of tools to implement system
- resistance to change
- perceived insufficiency in human and physical resources
- required learning needs

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Audits may be:**

- undertaken by trained staff and/or external auditors
- according to documented schedules in risk management strategy

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Business continuity plan may cover aspects such as:**

- resilient design
- resilient operations
- service restoration
- salvage
- full recovery

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- maintaining required physical and human resources to support the risk management system
- supporting staff to manage risk and implementing recovery processes where projected risks have eventuated
- reviewing the system to identify and implement improvements in risk management
- preparing a business continuity plan to cover emergency and disaster planning

**Required knowledge and understanding includes but is not limited to:**

- mechanisms to obtain and analyse feedback
- organisational goals and objectives, activities and systems
- risk assessment techniques and processes
- insurance policies, codes and operations
- relevant legislation, codes of practice and national standards regarding risk, including OHS legislation, public safety and duty of care
- property operations historical and precedent regarding risk to operations
- concepts of litigation
- client and organisational confidentiality requirements
- relevant industry codes of practice and standards
- auditing requirements
- continuity cycle and associated aspects

**Required skills and attributes include:**

- communication skills to:
  - use presentation skills for information sessions and briefings
  - source and collate feedback
- technical skills to:
  - use necessary equipment to document risk management strategies
- organisational skills to:
  - plan timelines and reporting mechanisms
  - record and file information
  - undertake audits
- observation skills to:
  - accurately identify existing or potential risks
- problem solving skills to:
  - assess and treat risk
  - apply reasoning and logical analysis to measure risk consequence
  - recommend countermeasures or business continuity plans
- research skills to:
  - analyse and interpret information
  - form recommendations
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining requirements to monitoring and maintaining the system and conducting a review and producing reports
- evidence must include a business continuity plan outlining emergency and disaster plans that include resource requirements, documented analysis techniques and processes used to monitor the risk management system, feedback obtained and key recommendations made to improve organisational risk management system

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD502A****Unit Descriptor****Develop a marketing and sales strategy**

This competency standard specifies the outcomes required to develop a marketing and sales strategy. It requires the ability to use appropriate analysis tools to evaluate the current market and to research appropriate marketing and sales strategies suitable to client requirements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Determine marketing and sales objectives            | <p>1.1 <i>Marketing and sales</i> opportunities are analysed in terms of their viability and likely contribution to organisational/client goals and objectives</p> <p>1.2 Marketing and sales requirements are accurately identified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.3 Sources of property <i>market information</i> are identified and information is collected in accordance with organisational requirements</p> <p>1.4 <i>Characteristics of customer</i> base and target markets are evaluated using available data and recognised research techniques</p> <p>1.5 <i>Business equipment/technology</i> is used to access, analyse and organise information in accordance with organisational requirements</p> |
| 2. Develop a marketing and sales strategy              | <p>2.1 <i>Marketing and sales objectives</i> and strategies are developed in consultation with relevant people in accordance with organisational requirements</p> <p>2.2 Marketing and sales strategies detail a range of <i>activities</i> that accurately reflect client needs and <i>legislative and ethical requirements</i></p> <p>2.3 Marketing and sales materials reflecting agreed strategies are developed within appropriate budgets and timeframes</p> <p>2.4 Marketing and sales methods that best fit the potential market are selected and utilised to ensure maximum impact within specified markets</p> <p>2.5 Personnel and resources required to support marketing and sales strategies are identified and prepared in accordance with organisational requirements</p>     |
| 3. Review and report on marketing and sales activities | <p>3.1 Marketing and sales activities are reviewed against the aims and objectives of the marketing/sales strategy</p> <p>3.2 Need for alternative marketing and sales strategies and adjustments is assessed in consultation with relevant people</p> <p>3.3 <i>Feedback</i> on marketing and sales strategy outcomes is sought using reliable methods and verifiable data in accordance with organisational requirements</p> <p>3.4 Conclusions and recommendations are prepared from verifiable evidence and constructive advice is provided on future marketing and sales initiatives</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing marketing/sales objectives with clients, colleagues and specialists	3
Collecting analysing and organising information	gathering and analysing information on target customer base choosing and applying criteria to determine market segments	3
Planning and organising activities	setting goals and establishing timelines to conduct marketing/sales activities	3
Working with others and in teams	obtaining feedback on marketing/sales strategy and outcomes	2
Using mathematical ideas and techniques	establishing timelines and determining marketing/sales budgets	2
Solving problems	negotiating objectives and timelines with client and colleagues arranging for contingency plans to be implemented	3
Using technology	monitoring market conditions and analysing industry benchmarks	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Marketing/sales may relate to:**

- marketing of goods
- services marketing and sales
- ideas marketing and sales
- public sector marketing and sales
- direct marketing and sales
- telemarketing and sales
- business-to-business marketing and sales

**Relevant people may include:**

- key stakeholders
- managers
- clients
- graphic artists
- industry professionals and associations
- business consultants
- real estate agents
- public relations consultants
- advertising executives
- taxation and accounting practitioners
- solicitors

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Market information may be collected using a range of techniques such as:**

- documentation, reports
- surveys (organisational or industry based)
- interviews, questionnaires
- media (newspaper, radio, television, industry magazines)
- group workshops/brainstorming
- discussions with colleagues/clients
- industry associations

**Characteristics of customer base to be considered may include:**

- consumer requirements
- desired benefits
- service usage
- attitude
- demographics
- lifestyle
- social and cultural factors
- business characteristics

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Marketing/sales objectives may relate to:**

- local, regional, national sales
- targeting specific tenancy mix
- new tenants
- promoting new property developments

**Activities may include:**

- direct marketing and sales
- business-to-business marketing and sales
- mail-outs
- use of internet/email
- target markets by service type
- promotional strategies such as:
  - canvassing and telephone canvassing
  - pricing
  - public relations
  - image and presentation
  - advertising

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Feedback may be obtained from:**

- questionnaires
- surveys
- competitors
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- regular meetings

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining marketing/sales requirements and client objectives
- selecting a range of suitable marketing and sales options
- collecting and analysing current market/sales information
- identifying marketing/sales activities and required resources and incorporating into a marketing/sales strategy
- obtaining feedback and collecting data to review success of marketing/sales strategy

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- marketing/sales principles and practice
- performance evaluation measures
- business planning processes
- customer relations policies
- market conditions and forces
- industry benchmarks
- market competitors

**Required skills and attributes include:**

- problem solving skills to:
  - develop contingency plans and select alternative marketing/sales options
  - negotiate strategies with clients
- analytical skills to:
  - research industry benchmarks
  - analyse data and budget requirements
- planning skills to:
  - plan and schedule marketing/sales activities
- communication skills to:
  - present marketing/sales information to clients
  - interpret written and oral information
- technology skills to:
  - maintain databases
  - source information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying objectives and developing marketing/sales strategies to reviewing and reporting on activities
- evidence must include completed marketing/sales strategy which details at least four types of marketing/sales activities, feedback obtained on marketing outcomes, data used to analyse marketing/sales objectives and customer base

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD503A****Unit Descriptor****Coordinate customer service activities**

This competency standard specifies the outcomes required to understand and implement customer service policies and procedures. This unit is based upon unit GCST05A from the Customer Service Generic Guideline Competencies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Contribute to quality customer standards | 1.1 <i>Customer</i> service standards are accessed, interpreted, applied and monitored in the workplace in accordance with <i>organisational requirements</i><br>1.2 Contributions are made to the development, refinement and improvement of service policies, standards and processes   |
| 2. Implement customer service systems       | 2.1 All personnel are encouraged to consistently implement customer service systems<br>2.2 <i>Customer feedback</i> is reviewed in consultation with appropriate personnel and is analysed when improving work practices<br>2.3 Customer service problems are identified and adjustments made to ensure continued service quality<br>2.4 Adjustments are communicated to all those involved in service delivery within appropriate time frames<br>2.5 Delivery of services/products is coordinated and managed to ensure they effectively and efficiently meet agreed quality standards   |
| 3. Lead customer service team               | 3.1 <i>Coaching/mentoring</i> is used to assist colleagues to deal with customer service issues and achieve the ultimate service potential<br>3.2 Team is motivated to achieve high standard of service to customer<br>3.3 Team is informed on changes in policies and procedures, which impact upon their relations with customers<br>3.4 Team is provided with regular <i>feedback</i> in regard to achievement/non-achievement of standards of customer service<br>3.5 Team members are encouraged to contribute feedback in regard to achievement of customer service<br>3.6 <i>Training</i> is undertaken as required to meet changing needs |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and discussing understanding of customer service policies and quality standards with colleagues, supervisor and/or customers	3
Collecting analysing and organising information	obtaining feedback from customers to develop improvement strategies	3
Planning and organising activities	prioritising training needs to support customer service activities	3
Working with others and in teams	providing coaching and mentoring support to fulfil customer service requirements and organisational requirements	2
Using mathematical ideas and techniques	measuring customer satisfaction	2
Solving problems	identifying and resolving customer complaints	2
Using technology	accessing customer service information	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Customers may be either internal or external, and may include but are not limited to:**

- customers with routine or special requests
- regular and new customers
- people from a range of social, cultural or ethnic backgrounds
- people with varying physical and mental abilities

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Customer feedback may be obtained from:**

- questionnaires
- documentation and reports
- analysis of quality assurance data
- telephone/face-to-face surveys

**Coaching and mentoring assistance may include:**

- providing feedback to another team member
- fair and ethical practice
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

**Feedback sources may include:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment
- regular meetings

**Training may include:**

- allocation of resources for training including acquisition, purchase of training services, development of staff training skills
- specific courses
- group discussions/conscious raising
- handouts/information sheets
- induction training
- ongoing assessment of training needs

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying customer service requirements and ensuring they are delivered to a professional standard in an appropriate timeframe
- obtaining and giving constructive feedback on customer service strategies
- ensuring staff are adequately trained to deliver customer service to agreed organisational standards
- developing and implementing improved customer service procedures

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational policies and procedures for dealing with customers
- principles and techniques of:
  - researching customer needs
  - customer relations
  - customer behaviour
  - problem identification and resolution
  - maintaining product/service quality
- a range of analysis techniques to interpret data
- organisational quality standards

**Required skills and attributes include:**

- functional literacy skills to:
  - access and use workplace information
- technology skills to:
  - select and use computers to analyse customer feedback
- coaching and mentoring skills to:
  - provide support to colleagues
  - provide feedback to customer service teams
- planning and organising skills to:
  - meet work priorities
- problem-solving skills to:
  - deal with complex and non-routine difficulties
- team work skills to:
  - work effectively with other people
- communication skills to:
  - research and analyse information
  - report on customer service strategies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from contributing to quality standards and implementing customer service systems to providing coaching and mentoring assistance to customer service teams
- evidence must include contributions to customer service policies, collated feedback from customers, evidence of how quality standards have been followed when coordinating the delivery of services and products and feedback provided to colleagues to improve customer service standards

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD504A****Determine needs of customer populations****Unit Descriptor**

This competency standard specifies the outcomes required to analyse population/market segments. It requires the ability to gather, analyse and interpret data to plan and evaluate customer service relationships and develop methods of improvement.

This unit is based upon unit GCSS07A from the Customer Service Generic Guideline Competencies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Analyse needs of customer populations  | 1.1 <i>Information</i> is sourced through both formal and informal channels in accordance with <i>organisational requirements</i><br>1.2 Information on issues related to business environment affecting <i>customers</i> is collected and utilised in assessment<br>1.3 Information is analysed and interpreted to identify and assess <i>customer needs, expectations</i> and satisfaction levels<br>1.4 Decisions about matching of services and customer needs are based on up-to-date information   |
| 2. Plan and develop customer service      | 2.1 Plans are developed to meet customer needs and to deliver improved customer service<br>2.2 Specific aspects of products/services and their delivery are modified as needed to meet changing customer service requirements<br>2.3 Competitive comparisons are analysed and evaluated as input into planning process<br>2.4 Customer service provisions are established through detailed and structured market research and <i>analysis</i><br>2.5 Changes to customer service are within organisational ability including policies and budgetary framework and procedural and <i>legislative requirements</i> |
| 3. Evaluate customer service relationship | 3.1 Information that measures customer level of satisfaction with its products services is obtained<br>3.2 Information on how organisation compares with competition and best practice is analysed and evaluated<br>3.3 Appropriate initiatives are implemented or actioned  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and discussing understanding of customer service policies and quality standards with colleagues, supervisor and/or customers	3
Collecting analysing and organising information	obtaining and analysing information on customer expectations	3
Planning and organising activities	matching services to customer needs developing customer service plans	2
Working with others and in teams	providing coaching and mentoring support to fulfil customer service requirements	2
Using mathematical ideas and techniques	measuring customer satisfaction	3
Solving problems	modifying service delivery to meet changing requirements	2
Using technology	accessing customer service information and analysing feedback	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Information may include but is not limited to:**

- customer satisfaction surveys
- information from the Australian Bureau of Statistics
- raw data collected at operational/tactical levels of colleagues
- organisational budgets

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Customers may include but are not limited to:**

- customers with routine or special requests
- regular and new customers
- people from a range of social, cultural or ethnic backgrounds
- people with varying physical and mental abilities

**Customer needs and expectations may relate to:**

- short and long term goals
- income stream projections

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- applying organisational customer service goals as well as established principles of customer service in the provision of products/services
- developing systems/procedures to deliver quality customer service in an appropriate timeframe
- modifying existing organisational systems/procedures to take into account identified changes in customer population
- gathering and analysing information relating to customer base and comparative market data to evaluate customer service relationship

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- industry benchmarks
- relevant local market conditions
- methods and techniques to analyse market segments
- organisational and professional procedures, ethical practices and business standards

**Required skills and attributes include:**

- technical skills to:
  - complete reports
- literacy skills to the level required to acquire the required read and write procedures and reports
- language skills to allow for adequate communication with the relevant personnel
- numeracy skills to interpret statistical information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately analysing needs of customer populations to delivering and evaluating customer service
- evidence must include a summary of information collected and analysed relating to the organisation's customers, a completed customer service plan outlining delivery methods, at least one customer survey designed to measure customer satisfaction levels and its results following analysis

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD505A****Unit Descriptor****Manage projects**

This competency standard specifies the outcomes required to plan, organise and monitor projects. It requires the ability to establish project requirements, monitor quality assurance processes, and evaluate project processes and outcomes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Determine project requirements         | <ul style="list-style-type: none"> <li>1.1 Project brief is identified and analysed to determine project requirements in accordance with organisational requirements</li> <li>1.2 Project objectives and timelines are negotiated and agreed in consultation with <i>client</i> and <i>relevantpeople</i></li> <li>1.3 Roles and responsibilities associated with project implementation are clearly defined and documented</li> <li>1.4 <i>Quality assurance goals and strategies</i> are established in consultation with relevant people in accordance with <i>organisational requirements</i></li> <li>1.5 Monitoring and reporting arrangements for <i>project activities</i> are established and documented in line with client requirements</li> <li>1.6 A <i>risk management plan</i> to identify, assess and control risks is developed and incorporated into project plan in accordance with <i>legislative</i> and organisational requirements</li> <li>1.7 A <i>project plan</i> is developed and reviewed to ensure it accurately reflects agreed terms and conditions</li> </ul> |
| 2. Organise support processes             | <ul style="list-style-type: none"> <li>2.1 Resource requirements are identified and organised in accordance with project plan and organisational requirements</li> <li>2.2 <i>Targets and milestones</i> are identified and linked to achievement of outcomes in accordance with project plan</li> <li>2.3 Effective <i>communication strategies</i> to encourage regular and accurate communication flow and feedback are established</li> <li>2.4 Documentation and checklists associated with project plan implementation are prepared in established formats and distributed to relevant people</li> <li>2.5 <i>Contingencies</i> are identified and activities planned to maximise quality outcomes in accordance with organisational procedures</li> </ul>   |
| 3. Monitor project processes and outcomes | <ul style="list-style-type: none"> <li>3.1 Project progress is systematically monitored and variations to project plan verified with client and relevant people and adjusted accordingly</li> <li>3.2 Expenditure and resource usage is monitored and controlled to ensure objectives are achieved within specified parameters</li> <li>3.3 <i>Coaching and mentoring</i> assistance is provided to project team as required to overcome difficulties throughout implementation process</li> <li>3.4 Regular reports on project progress and outcomes are provided to project team and relevant people to ensure adherence to project plan</li> <li>3.5 Systems, records and reporting procedures are maintained in accordance with organisational and legislative requirements</li> </ul>   |

4. Evaluate project outcomes
- 4.1 Project processes and outcomes are evaluated in consultation with client and relevant people using appropriate communication strategies
  - 4.2 Systematic review processes and established *evaluation methods* are identified and used to assess project processes and outcomes
  - 4.3 Evaluation results are prepared in the required format, style and structure and presented to relevant people within agreed timeframes
  - 4.4 Recommendations for improvement of project process are presented to relevant people in accordance with organisational requirements
  - 4.5 Relevant documentation is completed and processed in accordance with legislative and organisational procedures

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	conducting consultative processes to confirm project objectives and timelines	3
Collecting analysing and organising information	monitoring and reporting on project progress	3
Planning and organising activities	planning work activities and organising resources within budget constraints and agreed timeframes	3
Working with others and in teams	establishing team members roles and responsibilities	2
Using mathematical ideas and techniques	monitoring and assessing project performance	2
Solving problems	analysing actual or potential project risks and providing practical contingency solutions	2
Using technology	applying project management software formatting and preparing reports	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Clients may include:**

- property owners
- property agents
- tenants
- building supervisors
- agents
- government and legal agencies
- owner occupiers
- internal/external property groups
- institutions
- company management
- insurers
- risk assessors

### **Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- colleagues
- supervisors
- site personnel
- legal representatives
- industry professionals and associations
- tenants
- property owners
- financial institutions

### **Quality assurance goals and strategies may include:**

- reporting procedures and protocols
- procedures for monitoring and evaluating project outcomes and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for a change of corporate focus or significant project difficulties

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Project activities may include:**

- coordinating contractors, architects, builders, suppliers
- ensuring tasks are carried out
- communicating advice/information to team
- meetings, including preparation of minutes, papers and reports
- preparing project plan
- preparing project documentation
- monitoring financial arrangements
- reporting
- liaison with government agencies
- monitoring timelines

**Risk management plan may describe:**

- the process which will be used to identify, analyse and manage risks both initially and throughout the life of the project
- how often risks will be reviewed, the process for review and who will be involved
- who will be responsible for which aspects of risk management
- how risk status will be reported and to whom
- the initial snapshot of the major risks, current grading
- planned strategies for reducing likelihood and seriousness of each risk (mitigation strategies) and who will be responsible for implementing them

**Risks to the effective management of the project may include:**

- competing work demands
- technology/equipment breakdowns
- workplace hazards, risks and controls
- resource and materials availability
- budget constraints
- time delays
- inadequate active participation in the quality management process by all stake-holders

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Project plan may include:**

- a formal structure against which progress can be evaluated
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for changes or significant project difficulties
- acquisition strategies
- risk management plans
- project implementation plans
- consultation strategies to involve stakeholders
- transition plans
- specifications
- quality assurance procedures
- objectives, scope and expected benefits of the project
- project management methodology to be used
- structure of the project

**Targets and milestones may include:**

- measurement/achievement of set outcomes
- completion of contract phases/requirements
- achievement of key tasks/project phases
- progress reports
- contract requirements

**Communication strategies may include:**

- client-centred approaches
- ongoing liaison
- effective reporting arrangements
- continuous feedback mechanisms
- clear and concise use of technical terminology
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- organisational networks
- formal communication pathways
- organisational communication protocols and procedures

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- technology/equipment breakdowns
- unforeseen incidents
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Coaching and mentoring assistance may include:**

- providing feedback to another team member
- fair and ethical practices
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- consulting effectively with a range of individuals to ensure achievement of project outcomes
- designing systems and strategies to ensure effective operation of the project
- using evaluation techniques to monitor project progress
- maintaining accurate records and documents that outline project requirements and outcomes

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- contingency and risk analysis techniques
- project management concepts and principles
- key project success factors and typical project pitfalls
- project management systems and tools, such as:
  - critical path method
  - program evaluation and review technique (PERT)
- continuous improvement processes
- organisational quality systems such as:
  - strategic planning processes
  - issues relating to client satisfaction
  - recording systems

**Required skills and attributes include:**

- report writing skills to:
  - create a project brief, terms of reference or project charter
  - prepare written reports on project's progress
- technology skills to:
  - use spreadsheets and project management software
- communication and negotiation skills to:
  - gain agreement on project processes and timelines
- project planning skills to:
  - work within agreed timeframes and budgetary constraints
- time management skills to:
  - logically sequence project activities
- problem solving skills to:
  - promptly identify potential barriers to project outcomes
  - analyse project risks and establish contingencies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations



**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from planning project activities and monitoring resource requirements to ensuring effective project outcomes
- evidence must include a risk management plan, project plan, communication strategies, documentation showing how work activities were planned, evidence that project outcomes were achieved within timeframe and budget constraints, and evaluation techniques used to monitor the project's progress

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD506A****Unit Descriptor****Manage client relationships and networks**

This competency standard specifies the outcomes required to maintain positive business relationships and active professional networks. It requires the ability to share and promote professional experiences within a network and use interpersonal skills to build trust and improve client relationships.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Identify relationships and network requirements | <p>1.1 <i>Relationships and networks</i> required to achieve <i>business goals and objectives</i> are systematically identified</p> <p>1.2 <i>Consultative processes</i> are used to identify and verify relationship and network requirements in accordance with <i>organisational requirements</i></p> <p>1.3 <i>Business equipment/technology</i> is used to organise and maintain information for easy access and retrieval in accordance with organisational and <i>legislative requirements</i></p> <p>1.4 Strategies are developed to obtain ongoing <i>feedback</i> to maintain and improve client relationships</p> |
| 2. Establish and maintain client relationships     | <p>2.1 Communication methods are adapted to meet client preferred communication style</p> <p>2.2 Client preferences, needs and expectations are confirmed and clarified using appropriate <i>communication techniques</i></p> <p>2.3 Clear and constructive client advice is provided detailing service provision outcomes, current needs and future options</p> <p>2.4 Feedback from clients and colleagues is used to assess quality of own performance and identify areas for improvement</p>   |
| 3. Participate and influence business networks     | <p>3.1 Professional networks and relevant business relationships are maintained to provide identifiable benefits for clients and the organisation</p> <p>3.2 All interactions with network members reflect sensitivity to social and cultural differences and individual needs</p> <p>3.3 Appropriate <i>negotiation skills</i> are used to promote and encourage participation in a supportive environment for network members</p> <p>3.4 <i>Future support</i> and service requirements for network members are identified and addressed in consultation with relevant people</p>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	sharing and promoting professional experiences within a network	3
Collecting analysing and organising information	developing and maintaining contact listings sourcing information on upcoming networking opportunities	3
Planning and organising activities	identifying and prioritising individual networking needs identifying and arranging support services to encourage network participation	2
Working with others and in teams	building and developing business relationships and professional networks seeking and receiving constructive feedback on own performance from clients and colleagues	3
Using mathematical ideas and techniques	measuring and scheduling tasks	2
Solving problems	applying negotiation skills to achieve mutual agreement within client relationships applying constructive feedback to improve future client services	2
Using technology	maintaining up-to-date computer databases of contact listings maintaining regular communication within professional networks	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Relationships and networks may include:**

- work teams
- suppliers
- other organisations
- committees
- internal/external clients
- government agencies
- professional/occupational associations
- project specific ad hoc consultative/reference groups
- advisory committees
- lobby groups
- local inter-agency groups
- specific interest or support groups

### **Business goals and objectives may:**

- be stated or implied by the way the organisation conducts its business including:
  - organisational values and behaviours
  - flexibility, responsiveness, financial performance
  - work procedures and/or procedures manuals
  - people management, interpersonal communication
- relate to business planning, marketing and customer service

### **Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

### **Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from clients and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment
- questionnaires
- regular meetings

**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- use of language and concepts appropriate to cultural differences
- culturally inclusive and sensitive engagement techniques
- seeking feedback

**Negotiation skills may include:**

- collaboration
- solution designing
- confidence building
- conflict reduction
- stress management
- empathising

**Future support may relate to:**

- conference participation
- seminar attendance
- association memberships
- maintain regular contact
- individual marketing
- distribution of materials

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying networking requirements through consultation with clients and colleagues
- selecting appropriate methods and adapting communication styles when communicating with clients
- maintaining up-to-date computer databases of relevant contacts and associated information
- developing and implementing feedback strategies to obtain information from relevant people on ways to improve relationships and delivery of client services
- promoting and participating in networks and providing support to network members

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational policies, plans and procedures
- planning bodies and lines of contact
- marketing/promotion techniques applicable to the service or organisation
- principles of effective communication in relation to listening, questioning and non-verbal communication
- techniques for building relationships of trust including with people from different cultures
- knowledge of related organisations, agencies and networks
- principles and operations of networks

**Required skills and attributes include:**

- evaluation skills to:
  - assess benefits of networking
  - systematically evaluate own work relationships to identify new networking opportunities
- communication skills to:
  - give and receive feedback
  - maintain effective relationships and conflict management
- negotiation skills to:
  - achieve mutually acceptable outcomes
  - promote a supportive networking environment
- leadership skills to:
  - gain trust and confidence of clients and colleagues
- organisational skills to:
  - create a database of relevant networks
  - prioritise networking opportunities
- interpersonal skills to:
  - participate in industry events and activities
  - build professional relationships
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying networking requirements and establishing and maintaining positive client relationships to participating in network activities
- evidence must include relevant industry events or activities participated in, evidence of how networks are used to gain information, identify relevant potential industry affiliations, show how feedback was used to identify improvements to future client services, and include evidence of how technology is used to promote networks and access client information

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



**PRDPOD507A****Unit Descriptor****Ensure a safe workplace**

This competency standard specifies the outcomes required to establish, maintain and evaluate an organisation's occupational health and safety (OHS) system and procedures to ensure own safety and that of others in the workplace. It requires the ability to identify and control workplace risks and hazards and communicate workplace safety requirements.

This unit is based on Generic Competency C in the National Guidelines for Integrating OHS Competencies into National Industry Competency Standards.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Establish and maintain OHS framework   | <ul style="list-style-type: none"> <li>1.1 <i>OHS framework</i> is developed which clearly express the organisation's commitment to implement relevant <i>OHS legislation</i> in the enterprise</li> <li>1.2 <i>OHS roles and responsibilities</i> for all workplace personnel are defined to allow implementation of <i>OHS policies, procedures</i> and programs</li> <li>1.3 Financial and human resources for the effective operation of the OHS system are identified, sought and/or provided in a timely manner</li> <li>1.4 Information on the OHS system and its operational procedures is provided and explained to employees in a form that is accessible</li> </ul>  |
| 2. Establish and maintain participative arrangements  | <ul style="list-style-type: none"> <li>2.1 <i>Consultative processes</i> are established and maintained with employees and their representatives in accordance with relevant OHS legislation</li> <li>2.2 Issues raised through participation and consultation are dealt with and resolved promptly and effectively in accordance with procedures for issue resolution</li> <li>2.3 <i>Information</i> about the outcomes of participation and consultation is provided in a manner accessible to employees promptly</li> </ul>   |
| 3. Establish and maintain procedures for identifying hazards, and assessing and controlling risks | <ul style="list-style-type: none"> <li>3.1 Procedures for ongoing <i>hazard identification</i> and assessment and control of associated risks are developed</li> <li>3.2 Hazard identification is addressed at the planning, design and evaluation stages of any change in the workplace to ensure that new hazards are not created by the proposed changes</li> <li>3.3 <i>Procedures for selection and implementation of risk control measures</i> in accordance with the hierarchy of control are developed and maintained</li> <li>3.4 Inadequacies in existing risk control measures are identified in accordance with the hierarchy of control and resources enabling implementation of new measures are provided promptly</li> </ul> |

4. Review system effectiveness
- 4.1 An OHS induction and *training program* is developed and provided for all employees as part of the organisation's general training program
  - 4.2 A system for *OHS record keeping* is established and maintained to allow identification of patterns of occupational injury in the organisation
  - 4.3 Measurement and evaluation of the OHS system is undertaken in line with the organisation's Quality Systems' framework
  - 4.4 Improvements to the OHS system are developed and implemented to achieve organisational OHS objectives
  - 4.5 Compliance with the OHS legislative framework is assessed to ensure that legal OHS standards are maintained as a minimum

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing and verifying workplace safety procedures with colleagues to ensure compliance with OHS requirements	3
Collecting analysing and organising information	carrying out safety inspections to identify inadequacies in risk control procedures	3
Planning and organising activities	arranging a record keeping system	2
Working with others and in teams	providing coaching and mentoring support to team members	2
Using mathematical ideas and techniques	measuring and evaluating the OHS system	2
Solving problems	identifying hazardous workplace situations and reporting required actions	3
Using technology	communicating, accessing, organising and recording information	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Framework for OHS may include:**

- policy development and updating
- obtaining expert OHS advice as required
- designing safe operations and systems of work
- provision of information and training
- system for communicating information to employees, supervisors and managers within the enterprise
- mechanisms for obtaining updated information (eg health effects of hazards, technical developments in risk control, changes to legislation)
- determining ways OHS will managed, for example:
  - maintenance of plant and equipment
  - purchasing of materials and equipment
  - designed operations, work flow and materials handling
  - planning or implementing alterations to site, operations, plan or work systems
- counselling/disciplinary processes
- issue resolution

### **OHS legislation may include:**

- relevant Commonwealth/State/Territory legislation
- provisions relating to roles and responsibilities of OHS representatives and/or committees
- issue resolution
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- maintenance and confidentiality of records of occupational injury and disease
- requirements of provision of OHS information and training

### **Roles and responsibilities may include:**

- decision making
- duty of care
- OHS officer
- advisory

**OHS policies and procedures may relate to:**

- hazard and risk identification and reporting
- risk assessment and control measures
- incident/accident investigation
- OHS audits and safety inspections
- consultative arrangements for employees
- safe operating procedures/instructions
- use and maintenance of personal protective equipment
- emergency and evacuation procedures
- equipment maintenance and use
- use and storage of hazardous substances
- transport and storage of dangerous goods
- on site contractors, visitors and members of public
- first aid

**Consultative processes may include:**

- formal and informal meetings which include OHS
- OHS committees
- other committees, for example, consultative, planning and purchasing
- health and safety representatives
- suggestions, requests and concerns put forward by employees to management

**Information may be distributed by:**

- memos
- newsletters
- weekly/monthly reports
- internet/intranet
- email communication
- meetings

**Identification of risks and hazards may occur through activities such as:**

- audits and review of audit reports
- workplace inspections in area of responsibility
- housekeeping
- consulting with work team members
- checking work area and/or equipment before and during work
- job and work system assessment
- review of OHS records, including registers of hazardous substances, dangerous goods, etc

**Procedures regarding risk control may include:**

- hazard, accident and incident reporting procedures
- following safe operating procedures
- emergency, fire and accident procedures
- compliance with ergonomic and environmental requirements
- safe lifting and manual handling procedures
- regular OHS consultations
- correct selection, use, storage and maintenance procedures for personal protective clothing and equipment

**Risk control measures may include:**

- measures to remove the cause of a risk at its source
- application of the hierarchy of control:
  - elimination of the risk
  - engineering controls
  - administrative controls
  - personal protective equipment
- consultation with workers and their representatives

**Training program may include:**

- allocation of resources for training including acquisition, purchase of training services, development of staff training skills
- specific courses
- group discussions/conscious raising
- handouts/information sheets
- induction training
- ongoing assessment of training needs, eg relating to:
  - specific hazards
  - specific tasks
  - specific equipment use
  - emergencies and evacuations
  - new operations, materials

**OHS record keeping system may relate to:**

- audit and inspection reports
- workplace environmental monitoring records
- meeting agendas including OHS items and actions
- records of induction, instruction and training
- manufacturer's and supplier's information
- hazardous substances registers
- plant and equipment maintenance and testing reports
- workers compensation and rehabilitation records

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- implementing relevant OHS Acts, regulations and codes of practice within area of responsibility
- establishing and/or maintaining an OHS management system
- identifying when expert advice is needed, obtaining advice and acting on it promptly
- understanding the principles and practices of effective OHS management

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS
- legal responsibilities of employers, manufacturers, suppliers, employees and other parties
- application of the hierarchy of control (the preferred order of risk control measures from most to least preferred, that is, elimination, engineering controls, administrative controls, personal protective equipment)
- principles and techniques associated with modelling safe work practices, hazard identification and risk management
- literacy levels and communication skills of work group members and consequent suitable communication techniques
- principles and practice of effective OHS management in a small, medium or large business
- identification of intervention points for expert OHS advice
- regulatory compliance arrangements
- detailed knowledge of workforce characteristics and how they impact on the design and maintenance of OHS

**Required skills and attributes include:**

- evaluation skills to:
  - identify potential or existing risks and hazards in the workplace
  - identify inadequacies in risk control measures
  - determine OHS training requirements of the workgroup
- communication skills to:
  - accurately follow and give written and verbal instructions
  - clearly explain information on OHS issues
- analytical skills to:
  - identify and assess risks in the work area
  - assess resources required to apply risk control measures
- problem solving skills to:
  - analyse the entire work environment in area of responsibility in order to identify hazards, assess risks and judge when intervention to control risks is necessary
- coaching and mentoring skills to:
  - provide support to colleagues
- application skills to:
  - follow safe operating practices and procedures when using tools and equipment
  - comply with ergonomic and environmental protection requirements
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- a suitable work area for identification of hazards and control measures
- personal protective equipment
- OHS Acts, regulations and codes of practice
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from establishing an OHS framework, facilitation of consultation processes, establishing hazard identification and control procedures to reviewing OHS system effectiveness
- evidence must include an OHS framework, evidence of consultation processes used, eg agendas/minutes, an OHS training program which has been designed and implemented, evidence of OHS record keeping practices

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD508A****Unit Descriptor****Prepare tender documentation**

This competency standard specifies the outcomes required to prepare tender documentation for property/facility management and/or maintenance operations. It requires the ability to accurately determine property requirements, develop a detailed budget, and prepare documentation in accordance with established tender criteria and conditions.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                   |   |
|-----------------------------------|---|
| 1. Determine tender requirements  | <ul style="list-style-type: none"> <li>1.1 Tender brief and other relevant <i>documentation</i> are obtained and analysed to establish tender requirements in consultation with <i>relevant people</i></li> <li>1.2 <i>Viability</i> to comply with tender requirements is assessed against project specifications and organisational operational capacity</li> <li>1.3 <i>Risk assessment</i> is conducted on anticipated project outcomes in accordance with <i>organisational and legislative requirements</i></li> <li>1.4 Personal limitations in assessing tender requirements are identified and assistance sought as required from relevant people</li> <li>1.5 All relevant legislative requirements are interpreted and allowed for within parameters of tender requirements</li> </ul>       |
| 2. Estimate resource requirements | <ul style="list-style-type: none"> <li>2.1 Financial, physical and human resource requirements are determined in accordance with tender requirements</li> <li>2.2 Organisational rate schedules and conditions are applied to establish costings where appropriate in accordance with organisational requirements</li> <li>2.3 Factors that may affect capacity to meet tender requirements are identified through risk analysis and accounted for in resource estimates</li> <li>2.4 All information is reviewed to ensure accuracy and a budget determined to meet assessed tender and resource requirements</li> </ul>   |
| 3. Prepare tender documentation   | <ul style="list-style-type: none"> <li>3.1 <i>Business equipment/technology</i> is used to gather and compile relevant information in a suitable format according to organisational requirements</li> <li>3.2 Draft tender documentation is prepared which accurately reflects project requirements and complies with specific <i>tender criteria</i> and conditions</li> <li>3.3 Draft tender documentation is distributed to relevant people to check accuracy of information and that project requirements are clearly addressed</li> <li>3.4 <i>Feedback</i> is sought and where appropriate incorporated into tender documentation</li> <li>3.5 Final documentation is lodged within designated timelines and a copy securely maintained in accordance with organisational requirements</li> </ul> |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying tender criteria and conditions	3
Collecting analysing and organising information	locating and assessing information to establish tender requirements	3
Planning and organising activities	planning tender activities to match timeframe and budget constraints	3
Working with others and in teams	collaborating with relevant people to seek and incorporate feedback into tender documentation	2
Using mathematical ideas and techniques	compiling resource costings for use in a detailed budget	2
Solving problems	identifying risk factors that may affect anticipated project outcomes	3
Using technology	communicating, sourcing, reviewing and documenting information	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property documentation may include information relating to:**

- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans
- operating costs
- depreciation schedules
- company services

**Relevant people may include:**

- principals
- clients
- management
- colleagues
- legal representatives
- government agencies
- industry regulators and associations

**Viability may include consideration of:**

- available resources, equipment and supplies
- time constraints
- geographical constraints
- skills required for the provision of services
- financial considerations
- compliance with regulations

**Risk assessment may include:**

- identifying risks in isolation or as part of a broader risk management strategy, such as:
  - occupational health and safety (OHS)
  - environmental
  - financial/economic loss/failure
  - damage to property/equipment
  - professional incompetence
  - equipment/system failures

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Tender criteria and conditions may include:**

- eligibility for submission of tender
- special requirements
- tender document format
- interview, meeting or presentation of tender
- submission date

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- understanding methodologies and activities required to analyse tender requirements
- gathering and collating information
- following organisational procedures to produce tender documentation
- actively seeking feedback from clients and colleagues on tender requirements

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS issues, equal opportunity, industrial relations and anti-discrimination
- tender layout, format and presentation methods
- tendering codes of practice
- organisational pricing policy and procedures
- contingency and risk assessment techniques
- legal and ethical responsibilities, including:
  - maintaining client privacy and confidentiality
  - providing accurate information
  - meeting environmental standards
- organisational structure, services and environment
- customer service procedures and practices
- contractual arrangements in relation to property management/maintenance
- local knowledge of the property operations and development market

**Required skills and attributes include:**

- literacy and communication skills to:
  - read and interpret specific tender criteria and conditions
  - prepare required documentation using clear and comprehensible language
- research and evaluation skills to:
  - evaluate specifications to establish tender criteria
  - undertake qualitative and quantitative research
- numerical skills to:
  - estimate resource requirements
  - create a budget
- proofreading and editing skills to:
  - revise, amend and finalise tender documentation
- project planning skills to:
  - plan, schedule and track activities

technology skills to:

- • compile and present information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately analysing tender requirements to estimating resources and associated costings, and finalising the tender documentation in accordance with specifications
- evidence must include copies of documentation associated with at least two finalised tenders including feedback obtained, risk analysis and resource estimates and costings

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD509A****Unit Descriptor****Identify and secure a property opportunity**

This competency standard specifies the outcomes required to create and secure property opportunities. It requires the ability to recognise and investigate a viable property opportunity and develop a strategy to secure a property deal.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |   |
|---------------------------------------|---|
| 1. Research property opportunity      | <p>1.1 <i>Consultative processes</i> are used to verify <i>client</i> investment objectives and obtain advice from specialist property personnel in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Property market information</i> is gathered and organised in a format suitable for <i>analysis</i> and interpretation in accordance with organisational and <i>legislative requirements</i></p> <p>1.3 Methods for gathering information are reliable and make efficient use of time and <i>resources</i> in accordance with organisational requirements</p> <p>1.4 Property <i>opportunities</i> are identified and reviewed to allow effective comparability against client needs in accordance with organisational requirements</p> <p>1.5 Potential opportunities are documented and categorised to enable valid comparisons to be made against <i>market variables</i> and <i>industry benchmarks</i></p> |
| 2. Analyse property opportunity       | <p>2.1 Identified opportunities are reviewed and measured against property trends and <i>market parameters</i> to determine future recommendations</p> <p>2.2 Information is assessed using reliable and valid data analysis methods in accordance with organisational requirements</p> <p>2.3 Factors increasing or diminishing investment risk are assessed and discussed with client</p> <p>2.4 Scenarios are developed and checked against prescribed criteria to minimise subjective assessment</p> <p>2.5 Limitations in evaluating market information are identified and <i>specialist advice</i> sought as required in accordance with organisational requirements</p>  |
| 3. Recommend and secure property deal | <p>3.1 Interim control of asset is established through agreed methods in accordance with client and organisational requirements</p> <p>3.2 Recommendations are verifiable, current and sufficiently detailed to meet client, organisational and legislative requirements</p> <p>3.3 <i>Methods for securing control</i> are reliable and make efficient use of available time and resources in accordance with organisational requirements</p> <p>3.4 Recommendations include strategy for exit in accordance with client requirements</p>  |

4. Package property deal
- 4.1 Property deal is packaged and documented for presentation to interested parties for review and feedback in accordance with organisational requirements
  - 4.2 *Business equipment/technology* is used to organise relevant information in a format suitable for analysis and interpretation in accordance with organisational requirements
  - 4.3 Feedback from *relevant people* is analysed and incorporated where appropriate into the package in accordance with organisational requirements
  - 4.4 *Package* is presented to relevant people to enable formal *commitment* to proposed property opportunity
  - 4.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining client needs and discussing property investment options	3
Collecting analysing and organising information	sourcing and assessing property market information against benchmarks	3
Planning and organising activities	sourcing and analysing comparative data	2
Working with others and in teams	obtaining feedback to gain formal commitment on property deal	2
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	addressing risk factors and unfavourable market conditions	2
Using technology	researching and analysing property market information and presenting recommendations	3



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Clients may include:**

- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Property market information may be sourced from:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes
- industry/organisational databases

**Analysis may include:**

- examination of collected data
- formal quantitative and qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Opportunities may include:**

- creating something new
- altering existing property
- changing style of investment
- aggregation of assets
- adding value
- change in use, ownership, appearance, perception of property
- use of bankers and financiers

**Opportunities may be maximised by:**

- flexibility in negotiation
- protection of the integrity of the concept and enhancement of saleability of proposition

**Market variables may relate to:**

- type of property
- return versus risk
- return on investment
- geographic aspects
- capital growth versus short term gain
- limits to financial resources
- gearing possibilities
- balancing a portfolio
- ability to control asset
- cash flows
- capacity to improve asset
- taxation considerations
- demographics

**Industry benchmarks may include:**

- industry published building occupation data
- business strategy parameters
- market expectations
- financial constraints
- historical operational costs
- statutory costs
- building operational costs
- research data
- economic parameters

**Market parameters may include:**

- financial constraints
- tenancy possibilities
- return on investment
- maximum asset use
- assessment of supply and demand for asset type
- best use of asset

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- land economists
- developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations
- business consultants
- real estate agents

**Methods for securing control may include:**

- legal constraints
- memoranda of understanding
- options over site
- letters of intent
- confidentiality agreements

**Package may include:**

- history of proposition
- analysis of alternatives
- chosen option
- details of site security
- extent of financial involvements
- clear indication of commerciality of deal
- statements on credibility of parties
- letters of intent from interested parties

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Relevant people may include:**

- management
- colleagues
- clients
- interested parties
- site personnel
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Commitment may relate to:**

- guarantees
- letters of intent
- confidentiality agreements

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- sourcing and organising property market information and using it to identify property opportunities
- accurately analysing property market information using data analysis techniques and developing investment scenarios
- making recommendations on a property opportunity and using appropriate control methods to secure control of the property deal
- documenting and presenting a packaged property deal and gaining a formal commitment to the deal

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS, environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- local property market conditions and overall trends in the industry
- concepts and strategies for placement of capital in property for investment
- industry benchmarks
- a range of research methods and analysis techniques
- town planning
- investment risk factors and relationship to return expectations
- current market knowledge
- valuation
- land economics
- political environment

**Required skills and attributes include:**

- technology skills to:
  - efficiently use financial and assessment software and spreadsheets
  - access and present market information
- organisational skills to:
  - maintain records and databases
  - organise and prepare property opportunity submissions
  - build models for property investment
- problem solving skills to:
  - determine factors which may affect property markets
  - evaluate risk
- analytical skills to:
  - apply basic statistical methods and techniques
- research skills to:
  - source, analyse and interpret property and market information
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - deal with property investment stakeholders

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from sourcing, organising and analysing property market information to identifying, recommending and securing property opportunities
- evidence must include documentation showing how client needs were verified, a range of sourced market information, use of data analysis techniques to research investment risk, and final packaged deal

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD510A****Unit Descriptor****Coordinate fit-out of property and facilities**

This competency standard specifies the outcomes required to coordinate the fitting out of premises for user occupation. It requires the ability to administer contracts, select fit-out methods and coordinate the arranging of contractors and consultants.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Prepare for fit-out                 | <ul style="list-style-type: none"> <li>1.1 <i>Information</i> is sought to accurately determine fit-out requirements in accordance with <i>organisational requirements</i></li> <li>1.2 Required approvals are identified and confirmed to ensure fit-out compliance in accordance with industry and <i>legislative requirements</i></li> <li>1.3 <i>Consultative processes</i> are used to verify <i>client</i> expectations and objectives in accordance with organisational requirements</li> <li>1.4 Draft documentation is reviewed to ensure accuracy and relevance of information and is disseminated to <i>relevant people</i> for <i>feedback</i></li> </ul> |
| 2. Determine fit-out delivery method   | <ul style="list-style-type: none"> <li>2.1 <i>Fit-out delivery method</i> is determined based on client needs and organisational requirements</li> <li>2.2 Fit-out delivery methods are reliable and make efficient use of time and resources in accordance with organisational requirements</li> <li>2.3 Fit-out schedule is developed which details a range of activities and timelines that accurately reflect client and organisational requirements</li> <li>2.4 Fit-out schedule is sufficiently flexible and adaptable to accommodate any unforeseen <i>contingencies</i> that may arise</li> </ul>  |
| 3. Arrange contractors and consultants | <ul style="list-style-type: none"> <li>3.1 Contractors and consultants are arranged to undertake fit-out process in accordance with legislative and organisational requirements</li> <li>3.2 <i>Tendering and selection methods</i> meet client and legislative requirements</li> <li>3.3 Contracted services are relevant to fit-out work to be undertaken and client requirements</li> <li>3.4 Contract is finalised and written approval obtained from relevant people in accordance with organisational and legislative requirements</li> </ul>   |
| 4. Monitor fit-out processes           | <ul style="list-style-type: none"> <li>4.1 Fit-out operation is monitored against work schedules to ensure completion occurs within designated timeframes</li> <li>4.2 Factors affecting the achievement of scheduled work are promptly identified and required <i>variations</i> to schedules are negotiated and agreed with relevant people</li> <li>4.3 Established <i>communication channels</i> and processes are used to ensure an accurate exchange of information throughout operations</li> <li>4.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |

5. Finalise fit-out process
- 5.1 Notification of completed fit-out is received and checked against client and organisational requirements
  - 5.2 Inspection is arranged to confirm the fit-out is fully operational and meets specifications and industry standards
  - 5.3 Faults, errors or omissions are verified and prompt remedial action is determined and arranged in accordance with organisational requirements
  - 5.4 *Business equipment/technology* is used to securely maintain relevant *documentation* in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating fit-out requirements and consultant/contractor arrangements	3
Collecting analysing and organising information	researching fit-out information and checking work performed against fit-out schedules	3
Planning and organising activities	planning, scheduling and coordinating fit-out processes	3
Working with others and in teams	collaborating with relevant people to coordinate fit-out arrangements and seeking specialist advice as required	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	addressing variations to contracts and work schedules	2
Using technology	using planning and scheduling software and preparing reports	2



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Information may be sought from:**

- clients
- valuers
- architects
- planners
- designers
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Clients may include:**

- property/facility owners
- property/facility agents
- building supervisors
- project managers
- agents
- government and legal instruments/agencies
- private investors
- owner occupiers
- internal/external property/facility groups
- institutions
- funds providers
- company management
- insurers

**Relevant people may include:**

- management
- colleagues
- clients
- legal representatives
- technical experts
- contractors
- consultants
- industry professionals and associations

**Feedback may be sought via:**

- comments from client, legal representatives, industry specialists, supervisors and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**Fit-out delivery methods may relate to:**

- formal contracts
- internal staff
- temporary and casual staff contracts
- fixed prices

**Contingencies may relate to:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractors and consultants
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Tendering and selection methods may include:**

- public tenders
- compulsory competitive tenders
- advertisements
- selective tenders
- register of consultants
- direct appointments

**Variations may relate to:**

- changes to fit-out schedules
- work outside or producing results outside the terms and conditions of contract

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Specialist advice may be sought from:**

- supervisor
- colleagues
- fit-out specialists including architects, surveyors, engineers, valuers, planners, builders
- investment consultants
- bankers and financiers
- solicitors
- real estate agents
- technical experts
- government officials
- industry professionals and associations
- local government personnel

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Documentation may include**

- fit-out schedules
- fit-out contracts
- logs of equipment/system problems/faults
- warranty conditions and allowances
- operational checks and maintenance conducted
- costings, receipts, invoices
- property/facility leases, plans or contracts
- planning permits
- certifications
- inspection certificates
- handover documentation

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- preparing and executing a fit-out contract
- completing a fit-out in normal industry conditions
- arranging the contractor/consultant selection process
- negotiating variations and adjustments to fit-out schedule

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building construction practice, principles and processes
- contract law applied to building contracts
- consultant roles and capabilities
- project planning and scheduling

**Required skills and attributes include:**

- research skills to:
  - source fit-out information and resource requirements
- organisational skills to:
  - plan and arrange fit-out work
  - schedule and meet timelines and client requirements
  - manage risk
- communication skills to:
  - interpret written and oral information
  - complete documentation
  - negotiate client requirements, variations and adjustments to fit-out processes
- interpersonal skills to:
  - negotiate fit-out process
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting fit-out requirements to selecting the fit-out delivery method and arranging contractors and consultants
- evidence must include at least two copies of fit-out schedules and contracts and tender documentation for the consultant/contractor selection process

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD511A****Unit Descriptor****Determine space utilisation**

This competency standard specifies the outcomes required to develop design briefs for the utilisation of space. It requires the ability to analyse client requirements, develop design concepts and prepare a design brief using appropriate technology.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Determine space utilisation requirements | <p>1.1 <i>Consultative processes</i> are used to confirm occupancy requirements and retain specialist property personnel in accordance with organisational requirements</p> <p>1.2 Project processes, objectives and timelines are negotiated and agreed with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are sourced and reviewed to identify critical requirements of occupancy process</p> <p>1.4 <i>Space</i> occupancy plan is developed which details suitable activities that reflect <i>client</i> needs</p> <p>1.5 Situations requiring <i>specialist advice</i> are identified and support sought as required in accordance with organisational requirements</p> |
| 2. Establish design concepts                | <p>2.1 Design concepts are established based on examination of research and feasibility data in accordance with organisational requirements</p> <p>2.2 Design specifications are prepared in accordance with client needs and organisational and legislative requirements</p> <p>2.3 Relevant codes and standards are identified and examined to ensure compliance of design concepts</p> <p>2.4 <i>Concept plan</i> is produced that summarises <i>design recommendations and limitations</i> in accordance with organisational requirements</p> <p>2.5 Design recommendations include a review of <i>user</i> requirements to determine the <i>human environmental needs</i></p>   |
| 3. Prepare design brief                     | <p>3.1 Design brief is developed which includes clear and concise documentation of information sufficient to allow design plans for space to be completed</p> <p>3.2 <i>Business equipment/technology</i> is used to compile and prepare relevant information in a suitable format according to organisational requirements</p> <p>3.3 Draft design brief is presented to relevant people to ensure accuracy of information and that it meets project requirements</p> <p>3.4 <i>Feedback</i> is sought and where appropriate is incorporated into the design brief in accordance with organisational requirements</p> <p>3.5 Final design brief is lodged within designated timelines and copies securely maintained in accordance with organisational and legislative requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations and communicating project progress	3
Collecting analysing and organising information	using documentation and relevant legislation to determine space occupation and design requirements and assessing risk	3
Planning and organising activities	planning, managing and reviewing the design process for space use	3
Working with others and in teams	collaborating with client and users to obtain feedback on design brief	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	addressing problems and delays and resolving conflict	2
Using technology	using space management software and a computer to develop design brief	3

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Relevant people may include:**

- management
- users
- principals
- service providers
- builders
- architects
- clients
- legal representatives
- industry professionals and associations
- colleagues
- consultants

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Relevant documentation may include information relating to:**

- cash flow restrictions
- overall cost ceiling
- time constraints
- legislative constraints
- identification of formal and informal barriers and borders
- certificates of occupancy
- leases
- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements



**Space may include:**

- car parking
- buildings
- facilities
- properties
- lettable areas
- land

**Clients may include:**

- users
- property owners
- property agents
- government and legal instruments/agencies
- private investors
- owner occupiers
- internal/external property groups
- institutions
- company management

**Specialist advice may be sought from:**

- valuers
- architects
- engineers
- utilities providers
- communication providers
- designers
- planners
- investment consultants
- builders
- solicitors
- real estate agents
- technical experts
- government officials
- industry professionals and associations

**Design limitations may relate to:**

- tenant mix
- structure uses
- floor layouts
- facilities available
- tenant requirements
- legal constraints
- government planning criteria

**Concept plan may include:**

- floor plan
- services availability
- fire precautions facilities

**Users may include:**

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- bankers
- company boards
- tenants
- clients

**Human environment may include:**

- natural light
- common areas
- toilets
- gardens
- rest areas

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and/or legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- sourcing relevant documentation and negotiating with relevant parties to determine occupancy requirements
- reviewing and preparing a design concept plan which incorporates detailed recommendations on design costings, limitations and human environmental needs
- developing a design brief using appropriate technology which incorporates feedback received from relevant people

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- codes of practice
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- building construction practice
- space use design principles
- basic building services and elements
- planning requirements
- building and workplace standards for space use

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - manage project processes
- communication skills to:
  - interpret written and oral information
  - negotiate client and user requirements
  - communicate problems and delays
- technical skills to:
  - use software for planning and managing space (eg CAD, CAFM)
  - use planning and scheduling software
  - develop design brief
- analytical skills to:
  - interpret documentation
  - assess risk
  - estimate costings and budget needs
  - provide cost analysis applied to space occupation
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from planning space use requirements to preparing a design brief and reviewing the process
- evidence must include documentation of planning activities for at least two processes for determining space utilisation including completed design briefs

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD512A****Unit Descriptor****Contribute to a property feasibility study**

This competency standard specifies the outcomes required to contribute to a formal property feasibility study. It requires the ability to identify objectives and techniques to undertake the study, use valid and reliable research techniques to analyse information and to report study findings and conclusions.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                 |  |
|---------------------------------|--|
| 1. Establish study requirements | <p>1.1 Aims and objectives of feasibility study are clearly established in accordance with <i>client</i> and <i>organisational requirements</i></p> <p>1.2 Study objectives and timelines are negotiated and agreed in consultation with <i>relevant people</i></p> <p>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are gathered and reviewed to identify critical requirements of the study</p> <p>1.4 Situations requiring <i>specialist advice</i> are identified and support sought as required in accordance with organisational requirements</p>  |
| 2. Access relevant information  | <p>2.1 Relevant <i>information</i> is gathered and organised in a format suitable for <i>analysis</i> and interpretation</p> <p>2.2 Market information is accessed and evaluated in terms of validity, reliability and relevance in accordance with identified analysis requirements</p> <p>2.3 Relevant people are consulted to gather additional information using appropriate <i>communication techniques</i></p> <p>2.4 <i>Environment</i> is scanned to identify and assess factors that may impact on study in accordance with organisational requirements</p> <p>2.5 Methods for gathering information are reliable and make efficient use of time and resources in accordance with organisational requirements</p> |
| 3. Analyse information          | <p>3.1 Quantitative and/or qualitative analysis is undertaken of <i>comparative market data</i> using standard financial analysis techniques</p> <p>3.2 Economic trends and market developments are analysed in terms of potential implications and impact on study objectives</p> <p>3.3 <i>Risk</i> and <i>contingencies</i> are identified and quantified using established precedents and techniques in accordance with industry standards and organisational procedures</p> <p>3.4 Sound inductive reasoning is applied to ensure consistency of interpretations based on available information</p>   |

- |                                    |  |
|------------------------------------|--|
| 4. Formulate sensitivity scenarios | 4.1 Alternative project scenarios are developed to meet study requirements and criteria in accordance with organisational requirements<br>4.2 <i>Consultative processes</i> are used to obtain views of industry experts as required<br>4.3 Scenarios are developed and checked against prescribed criteria to minimise subjective assessment<br>4.4 Sensitivity analysis is performed on data to identify degree of convergence within identified industry and market <i>benchmarks</i><br>4.5 Property trends and <i>market conditions</i> are identified and evaluated against study requirements |
| 5. Document feasibility study      | 5.1 Feasibility study is presented in appropriate format, style and structure using suitable <i>business equipment/technology</i><br>5.2 Report is prepared and distributed to relevant people within agreed timeframes in accordance with organisational requirements<br>5.3 Conclusions are verifiable, current and sufficiently detailed to meet identified client and organisational requirements<br>5.4 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations and consulting on environmental impact and sensitivity scenarios	3
Collecting analysing and organising information	sourcing and assessing market data, and formulating and assessing scenarios against prescribed criteria	3
Planning and organising activities	coordinating and conducting consultative processes to establish study requirements	3
Working with others and in teams	consulting with interested parties to obtain advice and receive feedback	3
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	gathering additional information as required to ensure accuracy and sufficiency of information	3
Using technology	researching, analysing and documenting study data	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Clients may include:**

- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant people may include:**

- management
- colleagues
- client
- interested parties
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Relevant documentation may relate to:**

- leasing rates
- depreciation schedules
- policy/management procedures
- current and planned property/site developments
- sales information
- marketing services
- land title and zoning
- legal status
- deposited, survey and other plans and maps
- tenancy and other contracts or leases
- permits
- building codes
- rates notices
- taxation papers

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- land economists
- developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations

**Sources of information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes
- industry/organisational databases

**Analysis may include:**

- examination of collected data
- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition



**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Environment may relate to:**

- size, location and nature of property
- property stakeholders
- competitors
- neighbours
- situational issues
- environmental issues (water, noise, air)
- financial markets
- stability of property, industry and market
- market share
- leasing/tenanting arrangements or prospects

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Risk factors which may influence the complexity of the feasibility study may include:**

- existing land use and ownership
- constraints on use
- government zoning and restrictions
- type and number of tenants
- staging of investment and/or development
- project financing
- structure of leases

**Contingencies may relate to:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractor
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Benchmarks may include:**

- industry published building occupation data
- business strategy parameters
- market expectations
- financial constraints
- historical operational costs
- statutory costs
- building operational costs
- research data
- economic parameters

**Market conditions may relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- consulting with relevant people and sourcing documentation and relevant legislation to establish study aims and objectives
- sourcing market and environmental information to identify factors impacting on study
- accurately analysing market information to identify economic trends and market developments, and risk and contingency factors
- formulating sensitivity scenarios against industry benchmarks
- documenting and presenting feasibility study using appropriate business equipment/technology

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- sources of industry and market information
- market conditions
- types of property markets
- alternative property uses
- business and industry property networks
- value management
- project assessment methods

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - manage project processes
- problem solving skills to:
  - determine factors which may affect property markets
  - evaluate risk
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements
  - consult with industry experts and others
- technical skills to:
  - use software for planning and scheduling tasks
  - efficiently use financial and assessment software and spreadsheets
  - access market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- research skills to:
  - source, analyse and interpret property and market information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying study requirements and assessing environmental impact, to formulating sensitivity scenarios and documenting the completed study
- evidence must include documentation of at least two studies including information gathered and analysed, identified environmental impact and sensitivity scenarios formulated, and the documented feasibility scenario

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD513A****Unit Descriptor****Assess viability of regeneration options**

This competency standard specifies the outcomes required to assess the viability of regeneration options for property. It requires the ability to define assessment criteria appropriate to the type of asset and recommend preferred viable options based on those criteria.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Establish requirements of asset regeneration | <p>1.1 <i>Asset regeneration</i> requirements are reviewed and confirmed with <i>relevant people</i> as required in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Consultative processes</i> are used to negotiate and agree project process, objectives and timelines with relevant people in accordance with organisational requirements</p> <p>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are sourced and reviewed to identify critical requirements of asset <i>regeneration options</i></p> <p>1.4 Project plan is developed which details suitable activities that reflect <i>client</i> needs in accordance with organisational requirements</p> <p>1.5 Situations requiring <i>specialist advice</i> are identified and support sought as required in accordance with organisational requirements</p> |
| 2. Define assessment criteria                   | <p>2.1 Industry and other relevant <i>benchmarks</i> are accessed and analysed to establish assessment <i>criteria</i> appropriate to the type and class of asset being assessed</p> <p>2.2 Types of evidence required to ensure valid and reliable decision making are determined and clearly defined</p> <p>2.3 Assessment processes are designed which detail the assessment method that will accurately reflect client needs and organisational requirements</p> <p>2.4 <i>Business equipment/technology</i> is used to organise and document assessment processes in a format suitable for analysis and interpretation</p> <p>2.5 Collection and analysis of <i>feedback</i> from relevant people regarding assessment criteria is used to validate assessment process</p>   |

- 3. Access relevant information
  - 3.1 *Relevant information* is gathered and organised in a format suitable for analysis and interpretation in accordance with legislative and organisational requirements
  - 3.2 *Sources of information* relevant to asset regeneration options are identified and accessed in accordance with organisational requirements
  - 3.3 Methods for gathering information are reliable and make efficient use of time and resources in accordance with organisational requirements
  - 3.4 Appropriate *interpersonal techniques* are used to access additional information from relevant people in accordance with organisational requirements
  - 3.5 Constraints and opportunities regarding regeneration *methods* are identified in accordance with organisational requirements
  - 3.6 Business equipment/technology is used to access, analyse and organise information in accordance with organisational requirements
  
- 4. Assess viability of options
  - 4.1 Viability of regeneration options is assessed and decision made on preferred option in accordance with organisational requirements
  - 4.2 Gathered information is examined to ensure its quality, validity and reliability in accordance with organisational requirements
  - 4.3 Assessment decision is based on an objective ranking of options against assessment criteria
  - 4.4 Regeneration options are presented in appropriate format, style and structure using suitable business equipment/technology
  - 4.5 Recommendations are verifiable and sufficiently detailed to meet client and organisational requirements
  - 4.6 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations and communicating project progress	3
Collecting analysing and organising information	sourcing and assessing relevant information and market data and assessing viability of regeneration options	3
Planning and organising activities	coordinating and conducting consultative processes to establish project requirements	3
Working with others and in teams	consulting with client to obtain advice and receive feedback	3
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	identifying regeneration options which are not viable	2
Using technology	researching, analysing and preparing information for presentation	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Asset may include:

- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Regeneration may relate to:**

- refit
- renovation
- representation
- redevelopment
- rebuild
- remodel
- redecorate
- repackage
- refinance
- retenant

**Relevant people may include:**

- management
- users
- principals
- service providers
- builders
- architects
- clients
- legal representatives
- industry professionals and associations
- colleagues

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Relevant documentation may include:**

- certificates of occupancy
- leases
- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans



**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Regeneration options may include:**

- refit
- renovation
- refurbishment
- redevelopment
- rebuild
- remodel
- redecorate
- repackage
- refinance
- retenant
- change of use
- market reposition

**Clients may include:**

- users
- asset/property owners
- asset/property agents
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Benchmarks may include:**

- industry association performance index
- published vacancies factors
- take-up rates
- tenancy mixes
- comparative analysis
- internal rate of return
- inflation rate
- discounted cash flow
- lifecycle costing

**Criteria may relate to:**

- cash flow
- capital growth
- financial feasibility
- foregone income
- sale realisation potential
- degree of compliance with legislation
- stated client requirements
- degree of market acceptance

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may be received through:**

- comments from management and/or colleagues
- comments from clients and/or legal representatives

**Relevant information may include information relating to:**

- leasing rates
- construction costs
- occupancy rates
- operating costs
- depreciation schedules
- company services
- policy/management procedures
- current and planned property/site developments
- sales information
- marketing services
- land title documentation
- legal documentation
- deposited, survey and other plans
- tenancy and other contracts
- permits
- building codes
- licences
- specifications
- agreements
- rates notices
- taxation records

**Sources of information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indices

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques

**Methods may include:**

- cash flowing
- capital growth indicators
- financial feasibility studies
- sale realisation potential analysis
- compliance with legislation
- review of stated client requirements
- analysis of degree of market acceptance

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- developing a project plan through consultation and research
- developing assessment criteria using industry benchmarks and feedback
- sourcing and accessing relevant information and identifying constraints and opportunities regarding regeneration methods
- assessing viability of regeneration options against specific criteria and presenting information on preferred option

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- relevant local property knowledge
- market movements
- financial analysis and modelling
- sources of industry data
- regeneration methods

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - manage project processes
- problem solving skills to:
  - determine factors which may affect property markets
  - assess risk
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements and consult on options
  - communicate problems and delays
- technical skills to:
  - use software for planning and scheduling tasks
  - efficiently use financial and assessment software and spreadsheets
  - access market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- research skills to:
  - source, analyse and interpret asset and market information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from establishing regeneration requirements, to assessing viability of options against specific criteria and making a decision on a preferred option
- evidence must include documentation of at least two assessment processes including information gathered and analysed, criteria developed and recommendations presented to client

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD514A****Unit Descriptor****Manage a consultant project team**

This competency standard specifies the outcomes required to select and coordinate a consultancy team to complete property projects. It requires the ability to administer project contracts, select, appoint and monitor contractors and facilitate project processes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                   |   |
|-----------------------------------|---|
| 1. Determine project requirements | <ul style="list-style-type: none"> <li>1.1 <i>Project specifications and/or other relevant documentation are obtained and analysed to establish project requirements</i></li> <li>1.2 <i>Consultative processes are used to negotiate and confirm contract requirements with relevant people in accordance with organisational requirements</i></li> <li>1.3 <i>Project plan is developed and contingencies planned to ensure contract, client and organisational requirements are met</i></li> <li>1.4 <i>Financial, physical and human resource requirements are identified and organised in accordance with the project plan and organisational requirements</i></li> <li>1.5 <i>Draft documentation is reviewed to ensure accuracy and relevance of information and disseminated to relevant people for feedback</i></li> </ul>   |
| 2. Assess and select contractors  | <ul style="list-style-type: none"> <li>2.1 <i>Project information is reviewed and assessed to determine the selection process and types of contractors required</i></li> <li>2.2 <i>Selection criteria are developed ensuring adherence to principles of value management in accordance with project requirements</i></li> <li>2.3 <i>Selection processes and timelines make efficient use of available time and resources in accordance with organisational requirements</i></li> <li>2.4 <i>Contractor assessment, selection and appointment processes are conducted in accordance with organisational and legislative requirements</i></li> <li>2.5 <i>Selection decision is based on evaluation of sufficient evidence against specified selection criteria to enable a judgement to be made on the best candidate</i></li> </ul> |
| 3. Monitor project                | <ul style="list-style-type: none"> <li>3.1 <i>Project plan is monitored against contracts and work schedules to ensure completion occurs within designated timeframes</i></li> <li>3.2 <i>Effective communication channels facilitate regular and accurate communication flow and feedback</i></li> <li>3.3 <i>Expenditure and resource usage is monitored to ensure objectives are achieved within project budgetary parameters</i></li> <li>3.4 <i>Factors affecting the achievement of scheduled work are promptly identified and variations to schedules are negotiated as required</i></li> </ul>  |

4. Finalise project
- 4.1 Notification of completed project is received and checked against contract and work schedules in accordance with organisational and legislative requirements
  - 4.2 Inspection is arranged to confirm the project meets contract and client requirements and industry standards in accordance with organisational requirements
  - 4.3 Any faults, errors or omissions are identified and prompt remedial action is arranged in accordance with organisational requirements
  - 4.4 *Business equipment/technology* is used to securely maintain relevant documentation in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating project and contractor requirements	3
Collecting analysing and organising information	researching project information and developing a project plan	3
Planning and organising activities	developing and coordinating project and selection strategy processes	3
Working with others and in teams	receiving feedback on the effectiveness of selection processes	3
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	addressing variations to contracts and work schedules	2
Using technology	researching, preparing and maintaining project information and documentation	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Project may include activities which:**

- give rise to creation of an asset
- involve fitting out of new structures
- involve modification of existing structures

**Relevant documentation may include:**

- tenders
- project contracts
- selection criteria
- property drawings and plans
- property leases and contracts
- operational checks and maintenance conducted
- planning permits
- certifications
- inspection certificates
- handover documentation

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Relevant people may include:**

- management
- colleagues
- clients
- legal representatives
- technical experts
- contractors
- consultants
- industry professionals and associations

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards



**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractors and consultants
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Clients may include:**

- property owners
- property agents
- building supervisors
- project managers
- agents
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management
- insurers

**Feedback may be sought from:**

- comments from clients, legal representatives, industry specialists, management and/or colleagues
- personal, reflective behaviour strategies
- workplace assessment

**Information may include:**

- selection criteria
- project plan
- tender documents
- budget documentation
- property documentation

**Selection process may include:**

- interview
- public tender
- compulsory competitive tender
- advertisement
- selective tender
- register of consultants
- direct appointment

**Selection criteria may include:**

- financial security
- demonstrated capacity to perform
- current work load
- quality of sub-contractors
- performance record
- contractor philosophy
- technical capability

**Principles of value management may include:**

- minimisation of variations
- coordination of services
- effective selection of contractor and ancillary workforce
- attention to detail
- adherence to costing constraints

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Variations may relate to:**

- changes to work schedules
- work outside or producing results outside the terms and conditions of contract

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## **EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- establishing contractor requirements through research of project specifications and consultation
- preparing selection criteria and conducting a contractor selection process
- monitoring a project against the project plan and using established communication channels
- inspecting a completed project to confirm it meets requirements of the project plan

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- building control legislation
- building codes and relevant Australian Standards
- selection methods and processes
- contract law applied to property and project contracts
- consultant roles and capabilities
- project planning and scheduling

**Required skills and attributes include:**

- research skills to:
  - source project information and resource requirements
- organisational skills to:
  - coordinate selection process
  - plan and monitor project processes
- communication skills to:
  - negotiate and monitor project processes
  - negotiate contractor requirements
  - conduct assessment and selection process
  - interpret written and oral information
- evaluation skills to:
  - select contractors
- interpersonal skills to:
  - resolve conflict
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately interpreting project requirements to selecting contractors and monitoring project processes
- evidence must include at least two copies of selection documentation including criteria, timetables and contracts and project planning documentation

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD515A****Unit Descriptor****Dispose of property**

This competency standard specifies the outcomes required to dispose of property as part of an investment portfolio. It requires the ability to accurately determine client requirements and to use effective communication methods in dealings with legal advisers and sale agents to coordinate and finalise arrangements for the disposal of property.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                    |  |
|------------------------------------|--|
| 1. Determine disposal requirements | <ul style="list-style-type: none"> <li>1.1 Disposal requirements are confirmed in consultation with <i>client</i> in accordance with <i>organisational requirements</i></li> <li>1.2 Client is informed of relevant <i>factors</i> which may impact on disposal in accordance with organisational requirements</li> <li>1.3 <i>Disposal method</i> suitable for <i>asset type</i> is selected in accordance with organisational requirements</li> <li>1.4 <i>Business equipment/technology</i> is used to access and organise relevant <i>information</i> in accordance with organisational requirements</li> <li>1.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 2. Arrange disposal                | <ul style="list-style-type: none"> <li>2.1 Market information is collected and evaluated to determine <i>price</i> in accordance with organisational and <i>legislative requirements</i></li> <li>2.2 Appropriate <i>interpersonal techniques</i> are used to facilitate an accurate and relevant exchange of information with <i>relevant people</i></li> <li>2.3 Disposal documentation is reviewed for accuracy and to ensure it meets intending purchaser, legal and organisational requirements</li> <li>2.4 Agent is appointed to facilitate completion of property disposal in accordance with legislative and organisational requirements</li> </ul>   |
| 3. Complete disposal               | <ul style="list-style-type: none"> <li>3.1 Arrangements for sale are completed and <i>appropriate documentation</i> executed in accordance with organisational and legislative requirements</li> <li>3.2 Deposits are secured and appropriate arrangements made to account for deposit on subsequent settlement</li> <li>3.3 <i>Feedback</i> on disposal arrangements is sought and reviewed to determine cost effectiveness in accordance with organisational requirements</li> <li>3.4 Sale records are updated to reflect completion of sale and securely stored in accordance with legislative and organisational requirements</li> </ul>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating client requirements and timelines for disposal advising clients of problems and delays associated with disposal	3
Collecting analysing and organising information	researching and selecting appropriate disposal method for the asset type	3
Planning and organising activities	appointing an agent to facilitate completion of the property disposal	3
Working with others and in teams	seeking and obtaining feedback to determine effectiveness of completed property disposal	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	recognising personal limitations in undertaking role and seeking appropriate specialist advice	3
Using technology	accessing, organising and documenting property disposal information	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Clients may include:

- private investors
- funds managers
- internal/external property groups
- institutions
- bankers
- property owners

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Factors which may impact on disposal of property may relate to:**

- nature of asset
- potential market value
- intrinsic value (eg heritage/cultural)
- financial and building constraints
- location
- environmental aspects
- market conditions

**Disposal method may include but is not limited to:**

- closed tender
- direct disposal
- expression of interest
- public auction
- public tender
- private treaty
- sale and leaseback

**Asset types may include but are not limited to:**

- land
- land and improvements
- site with planning/development approvals
- site without planning/development approvals

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Relevant information to disposal may include:**

- market intelligence from industry operators
- government statistics
- published analytical reports
- general knowledge of industry
- industry reports and indices
- media reports
- bank reports

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- land economists
- other developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations
- real estate agents

**Price may be determined by factors such as:**

- terms of disposal
- time-frames and conditions
- current market price tolerances
- method of sale
- tax implications

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Relevant people may include:**

- managers
- taxation and accounting practitioners
- solicitors
- internal/external legal advisers



**Appropriate documentation may include:**

- forms and paperwork required by legislation and statutory regulation
- internal documents required for the completion of the disposal process
- documents and proformas for the client

**Feedback may include:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- gathering regular feedback during the disposal cycle
- successfully disposing of a property
- choosing suitable disposal methods appropriate to a range of at least three asset types
- determining appropriate price based on an accurate analysis of market information
- communicating disposal documentation requirements clearly to advisers

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- relevant legislation especially in regard to OHS, environmental issues, equal opportunity, industrial relations and anti-discrimination
- taxation issues regarding property disposals
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations including contract law
- sources of advice on property disposals
- valuation methods and techniques to appraise property
- methods and techniques of disposal
- local property market conditions and overall trends in the industry

**Required skills and attributes include:**

- communication skills to:
  - provide relevant instructions and advice on property disposal
- research skills to:
  - source information on a range of appropriate disposal methods
  - collect and analyse financial performance information on property disposals to determine price
- problem solving skills to:
  - negotiate property disposals
  - source, analyse and interpret property and market information
- organisational skills to:
  - monitor property disposals
  - obtain and collate feedback on disposal methods
- technical skills to:
  - prepare and complete reports and access market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying disposal requirements and determining suitable disposal methods to updating sales records
- evidence must include documentation including, reason for disposal, impacting factors identified, analysis of asset type against selected disposal method, market information used to determine price, disposal documentation and evidence of secured deposits including feedback on disposal processes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD516A****Unit Descriptor****Implement asset maintenance strategy**

This competency standard specifies the outcomes required to determine asset maintenance requirements and implement and review appropriate strategies to meet the needs of individual clients. It requires the ability to effectively develop and document strategies to improve the ongoing quality of maintenance.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Determine maintenance system requirements | <ul style="list-style-type: none"> <li>1.1 <i>Asset maintenance</i> specifications and/or other <i>relevant documentation</i> are obtained and analysed to establish maintenance requirements</li> <li>1.2 Risk assessment is conducted on anticipated project outcomes in accordance with <i>legislative and organisational requirements</i></li> <li>1.3 <i>Industry benchmarks</i> are reviewed to determine maintenance intervals and other requirements</li> <li>1.4 All occupational health and safety (OHS) and other applicable legislative requirements are interpreted and allowed for within parameters of project requirements</li> </ul>   |
| 2. Design maintenance strategy               | <ul style="list-style-type: none"> <li>2.1 <i>Maintenance strategy</i> is designed which details a range of activities that accurately reflect <i>client</i>, legislative and organisational requirements</li> <li>2.2 <i>Maintenance methods</i> are reliable and make efficient use of available time and resources in accordance with organisational requirements</li> <li>2.3 Contract specifications for maintenance services are developed and incorporated into tender documents in accordance with legislative and organisational requirements</li> <li>2.4 Client safety and security requirements are incorporated in maintenance strategy in accordance with legislative and organisational requirements</li> <li>2.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |

- 3. Estimate resource requirements
  - 3.1 Viability to provide required maintenance services is assessed against maintenance specifications and organisational operational capacity
  - 3.2 Financial, physical and human *resources* to support maintenance requirements are determined and arranged in accordance with organisational requirements
  - 3.3 Organisational rate schedules and conditions are applied to established costings where appropriate in accordance with organisational requirements
  - 3.4 Factors that may affect capacity to meet project requirements are identified through risk analysis and accounted for in resource estimates
  - 3.5 Availability of resources is negotiated and confirmed with relevant people in accordance with organisational requirements
  - 3.6 All information is reviewed to ensure accuracy and a detailed budget is prepared in accordance with organisational requirements
  
- 4. Review and evaluate maintenance strategy
  - 4.1 Maintenance strategy is reviewed and evaluated in consultation with client and *relevant people* using appropriate *communication strategies*
  - 4.2 Systematic review processes and established evaluation methods are identified and used to evaluate strategy processes and outcomes
  - 4.3 *Evaluation* results are prepared in required format, style and structure and presented to relevant people within agreed timeframes
  - 4.4 Recommendations for improvement of strategy are presented to relevant people in accordance with organisational procedures
  - 4.5 *Business equipment/technology* is used to securely maintain documentation in accordance with legislative and organisational procedures

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming asset maintenance requirements	3
Collecting analysing and organising information	gathering asset maintenance system information to determine requirements and assess risk and resource needs	3
Planning and organising activities	coordinating and conducting research and consultative processes to determine maintenance requirements	3
Working with others and in teams	receiving feedback on the effectiveness of strategy	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	addressing safety and security requirements	3
Using technology	formulating and documenting information and preparing spreadsheets	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Assets may be static or dynamic and may include:**

- property/facilities
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Maintenance/repair may include:**

- inspections, lubrication, cleaning and adjustments
- routine repairs
- identification and replacement of worn parts
- confirmation of operational effectiveness
- changing user codes
- back-ups

**Relevant documentation may include:**

- service/maintenance records
- equipment/system problems/faults
- warranty conditions and allowances
- recommendations for repairs
- operational checks and maintenance conducted
- testing and commissioning results
- parts and components replaced, materials used
- costings, receipts, invoices
- property leases, plans or contracts
- planning permits
- certifications
- inspection certificates

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- relevant privacy laws
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Maintenance strategy may include:**

- painting
- cleaning
- sanitary disposal
- waste disposal
- emergency lighting
- evacuation
- fire lighting
- garden
- security
- vertical movement
- plumbing
- pests
- electrical
- weather proofing
- housekeeping

**Clients may include:**

- property owners
- property agents
- tenants
- building supervisors
- government and legal instruments/agencies
- private investors
- internal/external property groups
- institutions
- insurers
- risk assessors
- legal advisers



**Maintenance methods may include:**

- internal employee services
- outsourcing of external contracts with arms length organisations
- lease contractual obligations

**Safety and security requirements may be satisfied through:**

- adherence to OHS policies and procedures for the containment of:
  - potential safety and health hazards such as physical, mechanical or chemical agents which are already in the work environment, or are brought to the environment, or created as a by-product of work done on the site
  - emergency situations including fire, flood, bomb threats, suicide attempts or other actions likely to lead to bodily threat or fire

**Specialist advice may be sought from:**

- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Resources may relate to:**

- tools and equipment
- materials
- personnel
- training
- transport

**Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- management
- tradespeople
- colleagues
- clients
- site personnel
- legal representatives
- industry professionals and associations
- tenants
- property owners
- agents
- government personnel

**Communication strategies may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Business equipment/technology may include**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining maintenance system requirements and intervals using industry benchmarks and OHS considerations
- designing a maintenance strategy which includes procedures for the selection of maintenance contractors and safety and security of client
- preparing a detailed budget including a risk analysis and estimate of resource requirements
- reviewing and evaluating a maintenance strategy and presenting the results

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building construction practice
- basic knowledge of property contracts and administrative requirements
- common hazards to public and personal safety associated with particular types of maintenance work in buildings
- relevant building service, trades and operation for maintenance operations
- industry benchmarks for maintenance procedures

**Required skills and attributes include:**

- research and evaluation skills to:
  - source asset maintenance information and resource requirements
  - review and evaluate strategy
- organisational skills to:
  - schedule and meet timelines and client requirements
  - plan maintenance requirements and resource use
- analytical skills to:
  - interpret and evaluate documentation
  - assess risk
  - estimate costings and budget needs
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining asset maintenance requirements to designing and evaluating a maintenance strategy
- evidence must include relevant documentation of at least two maintenance strategies including detailed budgets, risk assessment and evaluation processes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD517A****Unit Descriptor****Advise on property investment strategy**

This competency standard specifies the outcomes required to provide effective advice on investment in property. It requires the ability to source and analyse market information and data, assess industry trends and provide effective advice and recommendations on property investment.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |  |
|---------------------------------------|--|
| 1. Determine investment requirements  | <ul style="list-style-type: none"> <li>1.1 <i>Property investment</i> requirements are identified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Client</i> needs are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></li> <li>1.3 Relevant <i>information</i> and <i>legislative requirements</i> are accessed to ensure investment options comply with requirements</li> <li>1.4 Methods for gathering information are reliable and make efficient use of time and <i>resources</i> in accordance with organisational requirements</li> <li>1.5 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul> |
| 2. Analyse investment opportunities   | <ul style="list-style-type: none"> <li>2.1 Identified property investment opportunities are analysed and measured against property trends and <i>market parameters</i> to determine future recommendations</li> <li>2.2 Reliable and valid data <i>analysis</i> methods are applied to identify facts, issues, patterns, interrelationships and trends</li> <li>2.3 Trends are accurately assessed to provide meaningful information on the performance of property investment opportunities</li> <li>2.4 Factors increasing or diminishing investment <i>risk</i> are identified, analysed and discussed with client</li> <li>2.5 Sound inductive reasoning is applied to ensure consistency of interpretations based on available information</li> </ul>   |
| 3. Provide advice and recommendations | <ul style="list-style-type: none"> <li>3.1 <i>Property investment strategy</i> is prepared which provides clear advice and recommendations to meet identified client needs in accordance with organisational requirements</li> <li>3.2 <i>Feedback</i> and comments on suitability and sufficiency of recommendations is obtained in accordance with organisational requirements</li> <li>3.3 Recommendations are supported by verifiable evidence and are consistent with investment objectives and client requirements</li> <li>3.4 Advice and recommendations are presented in an appropriate format, style and structure using <i>business equipment/technology</i></li> <li>3.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</li> </ul>                      |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining client needs and negotiating property investment options	3
Collecting analysing and organising information	sourcing property market information and conducting analysis to identify and assess industry trends	3
Planning and organising activities	sourcing and accessing comparative data for analysis	2
Working with others and in teams	obtaining and using feedback on suitability and sufficiency of recommendations	2
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	identifying risk factors and unfavourable investment conditions	3
Using technology	researching and analysing property investment information and preparing and presenting recommendations	3

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property investment may include:**

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes

**Relevant people may include:**

- management/colleagues
- clients
- analysts
- site personnel
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Clients may include:**

- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups
- partners
- joint ventures
- unit trustees
- owner occupiers
- developers

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Information may include:**

- market intelligence from industry operators or other interested parties
- government statistics
- published analytical reports
- general knowledge of industry
- industry reports and indices
- media reports
- bank reports
- cultural variations

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- analysts
- government officials
- industry professionals and associations

**Analysis may include:**

- examination of collected data
- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition



**Market parameters may relate to:**

- class and type of property
- return versus risk
- return on investment
- geographic aspects
- demographics
- capital growth versus short term gains
- limits to the financial resources
- gearing possibilities
- balancing a portfolio
- ability to control investment
- cash flows
- capacity to improve asset
- taxation considerations
- administrative talent
- market standing
- exit strategies

**Risk may relate to:**

- risk factors and return expectations
- market and sector risks (economic cycle, fixed interest, stock market)
- economic
- borrowing risk/gearing
- volatility of income and capital
- access restrictions on property
- specific property risk

**Property investment strategy may cover:**

- determining market sectors
- relative commitment of interested parties
- type of property

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from management and/or colleagues
- comments from clients and/or legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- sourcing and evaluating property investment information and identifying investment opportunities
- accurately analysing property investment information and identifying property trends and risk factors
- documenting and presenting advice and recommendations on property investment opportunities
- consulting with investors and interested parties, receiving feedback and incorporating it where appropriate into future work processes

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- local property market conditions and overall trends in the industry
- concepts and strategies for placement of capital in property for investment
- industry benchmarks
- a range of research methods and analysis techniques
- sources of funding
- local government regulations
- investment risk factors and relationship to return expectations
- current property and investment market
- specific market sector
- taxation as it applies to property development
- budgeting methods/techniques
- economics as it applies to property development

**Required skills and attributes include:**

- technology skills to:
  - efficiently use financial and assessment software and spreadsheets
  - access and present market information
- organisational skills to:
  - maintain records and databases
  - organise and prepare property investment submissions
  - build models for property investment
- problem solving skills to:
  - determine factors which may affect property markets
- analytical skills to:
  - apply basic statistical methods and techniques
- research skills to:
  - source, analyse and interpret property and market information
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - deal with property investment stakeholders

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from sourcing, organising and analysing property market information to evaluating and recommending property investment opportunities
- evidence must include documentation showing how client needs were verified, a range of sourced market information, use of data analysis techniques to research and analyse investment risk, and final documented investment submission

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD518A****Unit Descriptor****Implement asset management plan**

This competency standard specifies the outcomes required to plan for the management of assets. It requires the ability to implement effective strategies to manage the operational, resource and maintenance needs of assets and to review and evaluate those strategies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Establish performance needs of assets | <ul style="list-style-type: none"> <li>1.1 <i>Asset</i> performance needs are established in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Risk</i> assessment is conducted on asset management outcomes in accordance with organisational and <i>legislative requirements</i></li> <li>1.3 <i>Industry benchmarks</i> are analysed to determine expected <i>asset performance</i> in varying conditions in accordance with organisational requirements</li> <li>1.4 All applicable legislation is interpreted to establish user, contractual and legislative requirements for asset performance</li> <li>1.5 Specifications, conditions and manufacturer requirements for asset maintenance and operation are identified for incorporation into plan</li> </ul>  |
| 2. Prepare plan                          | <ul style="list-style-type: none"> <li>2.1 Asset management plan to facilitate the achievement of identified aims and objectives is prepared and presented to <i>client</i> for review in accordance with organisational requirements</li> <li>2.2 Quality assurance goals and strategies related to implementation of the plan are communicated using established <i>communication channels</i></li> <li>2.3 Monitoring and reporting arrangements for asset management plan are established and documented in line with client requirements</li> <li>2.4 Financial, physical and human resource requirements are identified and arranged in accordance with asset management plan and organisational requirements</li> <li>2.5 Roles and responsibilities for establishing and maintaining <i>asset register</i> are identified and documented in accordance with client and legislative requirements</li> <li>2.6 Operational and maintenance <i>schedule</i> detailing a range of activities and timelines is incorporated into asset management plan</li> </ul> |

## PRDPOD518A Implement asset management plan

3. Review and evaluate asset management plan
- 3.1 *Maintenance strategies* and plans are reviewed and evaluated in consultation with client and relevant people using appropriate *communication techniques*
  - 3.2 Systematic review processes and established *evaluation methods* are identified and used to assess planning processes and outcomes
  - 3.3 Evaluation results are prepared in required format, style and structure and presented to relevant people within agreed timeframes
  - 3.4 Recommendations for improvement of plan are presented to relevant people in accordance with organisational procedures
  - 3.5 *Business equipment/technology* is used to securely maintain documentation in accordance with legislative and organisational procedures

**KEY COMPETENCIES**

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	establishing asset performance requirements through consultation	3
Collecting analysing and organising information	gathering asset information to determine performance requirements and assessing risk and resource needs for incorporation in an asset management plan	3
Planning and organising activities	formulating operational and maintenance processes and planning strategies to develop an asset management plan	3
Working with others and in teams	reviewing and evaluating the effectiveness of asset management plan with relevant people	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks and resource needs	3
Solving problems	develop effective risk management plan to identify and control potential risks	2
Using technology	sourcing information and documenting and preparing an asset management plan	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Assets may be static or dynamic and include:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- management
- colleagues
- clients
- emergency personnel
- designated occupational health and safety (OHS) representative
- site personnel
- legal representatives
- industry professionals and associations
- tenants
- property owners
- agents
- government personnel

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Potential risk may relate to:**

- public liability
- industry special risks
- machinery malfunction
- loss of profits
- trade practices issues
- OHS

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Asset performance criteria may include:**

- functionality
- emergency operation and backup
- security
- downtime
- service levels
- maintenance requirements and cost
- life span
- condition assessment
- depreciation
- cost
- replacement
- age



**Clients may include:**

- property owners
- property agents
- building supervisors
- government and legal instruments/agencies
- private investors
- funds managers
- internal/external property groups
- institutions
- funds providers
- company management
- insurers
- risk assessors
- legal advisers

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Asset register may include:**

- telecommunications systems
- utilities
- heating
- ventilation
- air conditioning
- vertical services
- waste management
- cleaning
- security systems

**Schedules may be:**

- paper based
- computerised
- work diary
- to-do-lists
- charts
- wall mounted planning boards
- prepared for daily, weekly, monthly or annual timeframes

**Maintenance strategies may relate to:**

- painting
- cleaning
- sanitary disposal
- waste disposal
- emergency lighting
- evacuation
- fire lighting
- garden
- security
- vertical movement
- plumbing
- pests
- electrical
- weather proofing
- housekeeping

**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Business equipment/technology may include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining asset performance needs using industry benchmarks and consideration of risk
- preparing a detailed asset management plan which incorporates strategies for risk management, resource needs, monitoring and reporting arrangements and quality assurance
- documenting resource and support arrangements incorporating expected costs, processes for development and maintenance of an asset register and operational/maintenance schedules
- evaluating the asset management plan through consultation with interested parties

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building services and operation methods and practices
- building practices in relevant property types
- maintenance procedures, including vendor specifications
- industry performance benchmarks
- relevant property and services legislation
- standards for building equipment operation
- customer needs and preferences for different property types
- monitoring and evaluation systems

**Required skills and attributes include:**

- organisational skills to:
  - schedule and meet timelines and client requirements
  - organise resource and support processes
  - plan and document strategies to manage assets
- analytical skills to:
  - interpret documentation
  - analyse risk
  - estimate costings and budget needs
  - review and evaluate plan
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - develop schedules and document plan

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining asset performance needs to planning strategies for the ongoing management of assets
- evidence must include relevant documentation of at least two asset management plans including detailed budgets, risk assessments and evaluation processes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD519A****Unit Descriptor****Maintain public relations**

This competency standard specifies the outcomes required to promote and maintain positive public relations for the enterprise and property industry. It requires the ability to facilitate effective communication processes, prepare media releases and conduct media interviews.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Maintain relationships and networks | <p>1.1 Relationships and networks with <i>media</i> and <i>relevant people</i> are established and conducted in a positive and professional manner</p> <p>1.2 <i>Organisational social, ethical and business standards</i> are complied with to maintain positive relationships in accordance with <i>organisational requirements</i></p> <p>1.3 Systems to encourage communication flow and ongoing <i>feedback</i> are established and maintained to ensure an accurate and relevant exchange of information</p> <p>1.4 Appropriate <i>interpersonal techniques</i> are used to develop professional relationships with media that reflect sensitivity to individual differences and <i>client</i> requirements</p> <p>1.5 Suitable networks are put in place to ensure information on <i>unplanned events</i> is accurate and timely in accordance with organisational requirements</p> |
| 2. Prepare media release               | <p>2.1 Media release is clear, relevant and targeted to intended audience in accordance with organisational and <i>legislative requirements</i></p> <p>2.2 Media release presents a positive image for property and client in accordance with organisational and legislative requirements</p> <p>2.3 Suitable <i>professional service providers</i> are engaged where required to support relationships with media</p> <p>2.4 Media release is promptly distributed using established <i>communication channels</i> in accordance with organisational procedures</p> <p>2.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</p>  |
| 3. Conduct media interviews            | <p>3.1 Media interviews are conducted in a professional manner that represents preferred profile of property and client</p> <p>3.2 Provided information is clear, accurate and protects interests of parties involved with property</p> <p>3.3 Suitable aids are used to ensure message is relevant and of interest to selected media</p> <p>3.4 Feedback is used to develop and implement strategies to further maintain and improve relationships with targeted groups</p> <p>3.5 Appropriate interpersonal techniques are used to negotiate difficult situations to achieve results acceptable to participants and which meet organisational and legislative requirements</p>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	providing clear and accurate information through media releases and interviews	3
Collecting analysing and organising information	using established networks and processes to source, analyse and prepare information for distribution	2
Planning and organising activities	scheduling, coordinating and conducting media interviews	3
Working with others and in teams	building and maintaining professional relationships and networks	3
Using mathematical ideas and techniques	scheduling tasks to meet deadlines	2
Solving problems	responding appropriately and effectively to unplanned events	2
Using technology	developing and maintaining databases of contacts and preparing media releases	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Media may include:

- radio
- television
- print
- internet

**Relevant people may include:**

- industry personnel
- management/colleagues
- clients
- legal representatives
- industry professionals and associations
- owner occupiers
- internal/external property groups
- institutions
- tenants
- community groups
- customers
- service providers

**Organisational social, ethical and business standards:**

- refers to those relevant to public relations activities
- may be written or oral
- may be stated or implied

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues/media
- regular meetings

**Interpersonal techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Clients may include:**

- company or business enterprises
- property owners
- property agents
- project managers
- government and legal instruments/agencies
- private investors
- funds managers
- internal/external property groups
- risk assessors

**Unplanned events may include:**

- emergencies
- fire
- personal injury
- theft
- violence
- riot
- civil disruption

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- relevant industry codes of practice
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- consumer protection
- trade practices
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Professional service providers may include:**

- journalists
- public relations consultants
- designers
- graphic artists
- writers

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology



## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- maintaining positive relationships and networks with the media and industry personnel through effective communication and interpersonal techniques
- preparing and distributing media releases which present a positive image for the property/client and account for potential emergency situations
- conducting media interviews which provide clear and accurate information in a professional manner and is appropriate and sensitive to the audience
- reviewing work processes to include feedback from colleagues/clients on strategies to further improve and maintain relationships and networks

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Australian Standards and legislation
- media processes and protocols
- types of emergencies
- industry benchmarks for emergency response
- types of media service providers

**Required skills and attributes include:**

- communication skills to:
  - conduct interviews
  - build and maintain relationships and networks
  - encourage and receive ongoing feedback
- analysis and interpretation skills to:
  - ensure collection of valid and reliable information
  - assess property information
  - determine target audience and type of media
- literacy skills to:
  - read and interpret a variety of information
  - collate and prepare required documentation
- problem solving skills to:
  - identify emergency situations
  - respond to contingency situations
- interpersonal skills to:
  - adapt personal style to suit target audience
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from maintaining networks and relationships with media and industry personnel and preparing media releases, to conducting media interviews and responding to unplanned emergency situations
- evidence must include documentation of at least four media releases, databases of network contacts, and work plans which demonstrate planning for emergencies and feedback processes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD520A****Unit Descriptor****Develop a tenancy mix strategy**

This competency standard specifies the outcomes required to analyse client objectives and formulate a relevant strategy to enable the right market mix of tenants to be targeted. It requires the ability to determine industry trends, document recommendations and select and implement a suitable marketing strategy.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |  |
|---------------------------------------|--|
| 1. Determine tenancy mix requirements | <p>1.1 <i>Client preferences, needs and expectations</i> are identified in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Information</i> is gathered and analysed to determine <i>market conditions</i> in accordance with organisational requirements</p> <p>1.3 Business plans are examined to determine short and long term goals in accordance with organisational requirements</p> <p>1.4 <i>Tenancy mix</i> objectives and timelines are negotiated and agreed in consultation with <i>relevant people</i></p>  |
| 2. Develop tenancy mix strategy       | <p>2.1 <i>Segmentation criteria</i> are chosen and applied to determine tenancy mix which meets client and <i>building capacity requirements</i></p> <p>2.2 Tenancy mix is sought which adds value to property and encourages effective competition in accordance with income projections</p> <p>2.3 Draft tenancy mix strategy is prepared and distributed to relevant people to obtain <i>feedback</i> in accordance with organisational requirements</p> <p>2.4 Tenancy mix strategy is reviewed to ensure compliance with relevant <i>regulations</i> and <i>legislative requirements</i></p> <p>2.5 <i>Marketing options</i> that best meet requirements of tenancy mix strategy are identified and discussed with relevant people in accordance with organisational requirements</p> |
| 3. Implement tenancy mix strategy     | <p>3.1 Lease and tenancy contracts are documented and summarised in accordance with organisational requirements</p> <p>3.2 Market conditions and industry trends are assessed to determine appropriate benchmarks</p> <p>3.3 Tenancy mix strategy is monitored and any variances recognised and promptly documented in accordance with organisational requirements</p> <p>3.4 Contingency plans are prepared and implemented in accordance with organisational and legislative requirements</p>  |

4. Review tenancy mix strategy
- 4.1 Tenancy mix strategy is reviewed and evaluated in consultation with client and relevant people using appropriate *communication strategies*
  - 4.2 Systematic review processes and established and *evaluation methods* are identified and used to evaluate strategy processes and outcomes
  - 4.3 Evaluation results are prepared in required format, style and structure and presented to relevant people within agreed timeframes
  - 4.4 Recommendations for improvement of strategy are presented to relevant people in accordance with organisational procedures
  - 4.5 Business equipment/technology is used to securely maintain documentation in accordance with legislative and organisational procedures

### KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	discussing tenancy needs with client, colleagues and prospective tenants	3
Collecting analysing and organising information	gathering and analysing information on building capacity requirements choosing and applying criteria to determine market segments	3
Planning and organising activities	setting goals and establishing timelines to suit both long and short term projections	3
Working with others and in teams	obtaining feedback on tenancy mix strategy	2
Using mathematical ideas and techniques	establishing timelines and determining income projections	2
Solving problems	negotiating objectives and timelines with client and colleagues arranging for contingency plans to be implemented	3
Using technology	monitoring market conditions and analysing industry benchmarks preparing and presenting tenancy mix strategy to client	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Clients may include:**

- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- bankers
- company boards

**Client needs and expectations may relate to:**

- short and long term goals
- income stream projections
- long term tenancy contracts
- increased profile of asset

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Information which may be used to determine market profiles and conditions may include:**

- industry sources
- existing research data
- original research
- response based research
- surveys

**Market conditions may relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Tenancy mix may cover:**

- number of tenants
- type of tenancy
- length of tenancy
- type of business
- type of tenant customers
- location
- size of tenancy

**Relevant people may include:**

- managers
- clients
- architects
- industry professionals and associations
- business consultants
- real estate agents
- advertising agencies
- taxation and accounting practitioners
- solicitors

**Segmentation criteria to be used may include but is not limited to:**

- consumer requirements
- desired benefits
- product/service usage
- attitude
- demographics
- lifestyle
- social and cultural factors
- business characteristics

**Building capacity requirements may include:**

- car parking
- building functions
- maximise net lettable area
- parcel size
- space pattern
- compatible uses
- amenities
- associated conditions (noise, dust, environment)

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Regulations affecting tenancy mix strategies may include:**

- Trade Practices Act 1974
- corporations law
- Commonwealth/State/Territory legislation regarding retail/commercial tenancy
- Commonwealth/State/Territory zoning requirements
- retail and commercial leasing Acts/guidelines

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy laws applying to owners, contractors, tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Marketing options may include:**

- local, regional, interstate, national
- direct marketing
- business-to business marketing
- mail-outs
- use of internet/email
- target markets by service type
- promotional strategies such as:
  - canvassing and telephone canvassing
  - pricing
  - public relations
  - image and presentation
  - advertising
  - community education

**Communication strategies may include:**

- active listening
- questioning to clarify and confirm understanding
- use of language and concepts appropriate to cultural differences
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately profiling tenancy needs of client after examining client business plans
- documenting a tenancy mix strategy which outlines the targeted market segment
- obtaining feedback on draft tenancy mix strategy and amending accordingly
- selecting and implementing suitable marketing strategies

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- industry benchmarks
- relevant local market conditions
- a range of tenancy mix strategies
- State and local government planning processes
- methods and techniques to analyse market segments
- organisational and professional procedures, ethical practices and business standards
- common lease terms and conditions
- types of property leases



**Required skills and attributes include:**

- problem solving skills to:
  - develop and implement contingency plans
  - select appropriate marketing options
- planning skills to:
  - estimate financial projections
  - determine short and long term goals
- presentation skills to:
  - prepare and deliver marketing options to clients
- communication skills to:
  - interpret written and oral information
  - consult with clients and potential tenants
- technical skills to:
  - develop and complete reports
- analytical skills to:
  - interpret documentation
  - analyse current market conditions and future trends
  - devise tenancy mix strategies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - obtain feedback

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately determining client requirements, preparing a tenancy mix strategy to implementing and reviewing a tenancy mix strategy
- evidence must include completed tenancy mix strategy outlining timelines and objectives, analysis of market conditions and industry benchmarks, and documentation showing how organisational and legislative requirements have been applied

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

## PRDPOD521A

## Develop and coordinate strata/community management agreement

### Unit Descriptor

This competency standard specifies the outcomes required to establish and coordinate a strata/community management. It requires the ability to effectively develop strategies to manage the operational, resource and maintenance needs of assets and to review and evaluate those strategies.

### Unit Sector

Property operations and development

### ELEMENT

### PERFORMANCE CRITERIA

1. Establish agreement requirements
  - 1.1 Management agreement requirements are established in consultation with relevant people in accordance with *client, organisational and legislative requirements*
  - 1.2 Registered plans are accessed and interpreted to establish user and contractual obligations in accordance with legislative requirements
  - 1.3 Relevant legislation is interpreted to establish user, contractual and legislative requirements
  - 1.4 Cost share arrangements are identified through systematic *analysis* of use of shared assets and facilities
  - 1.5 *Risk* assessment is conducted on expected management agreement outcomes in accordance with organisational procedures
  - 1.6 *Industry benchmarks* are analysed against expected outcomes in varying conditions in accordance with organisational procedures
2. Prepare agreement
  - 2.1 Management agreement is prepared in required format, style and structure and presented to relevant people within agreed timeframe
  - 2.2 Roles and responsibilities associated with implementation of management agreement are clearly defined and documented
  - 2.3 Cost share arrangements are *negotiated* and agreed between users in accordance with identified client needs
  - 2.4 Suitable insurance coverage is researched and negotiated based on identified management agreement requirements
  - 2.5 A *risk management plan* to identify, assess and control risks is developed and incorporated into management agreement in accordance with legislative and organisational requirements
  - 2.6 Financial, physical and human resource requirements are identified in accordance with management agreement and organisational requirements

- 3. Organise resources and support processes
  - 3.1 Appropriate resources and support processes are negotiated and confirmed with relevant people in accordance with organisational procedures
  - 3.2 Continuous suitable insurance cover is maintained based on client and legislative requirements
  - 3.3 Organisational rate schedules and conditions are applied to established costings where appropriate in accordance with organisational requirements
  - 3.4 Information related to implementation support requirements is promptly distributed using established *communication channels*
  - 3.5 Operational and maintenance schedule is developed which details a range of activities and timelines that accurately reflect client and organisational requirements
  - 3.6 Situations requiring specialist advice are identified and assistance sought as required in accordance with organisational procedures
  
- 4. Review and evaluate management agreement
  - 4.1 Management agreement is reviewed and evaluated in consultation with relevant people using appropriate communication techniques
  - 4.2 Systematic review processes and established *evaluation methods* are identified and used to assess processes and outcomes
  - 4.3 Evaluation results are documented using *business equipment/technology* and presented to relevant people for *feedback* in accordance with applicable occupational health and safety (OHS) and organisational requirements
  - 4.4 Recommendations for improving project processes are implemented where possible in accordance with organisational requirements
  - 4.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting to ascertain and confirm project requirements and arrange resource/support processes	3
Collecting analysing and organising information	identifying and analysing risk factors and cost share arrangements	3
Planning and organising activities	managing project processes and planning strategies to develop and implement management agreement	3
Working with others and in teams	receiving feedback on project processes and effectiveness	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks and resource needs	2
Solving problems	implementing strategies to improve project processes	3
Using technology	formatting, documenting and presenting management agreement	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Relevant people may include:**

- management
- colleagues
- clients
- legal representatives
- industry professionals and associations
- consumers
- government personnel

**Clients may include:**

- strata companies
- potential and existing owners
- prospective and existing tenants
- owners corporations/body corporate and community title groups
- agents/third parties for owners
- in-house staff and office contractors

**Organisational requirements may be outlined and reflected in:**

- agency policies/guidelines
- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- sales, marketing and leasing/management procedure manuals
- policies and procedures in relation to client service
- legal and organisational policies/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices laws and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Analysis may include:**

- examination of collected data
- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Risks may relate to:**

- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- suppliers and contractors
- changes to regulations and legislation
- time and budget constraints
- emergencies and disasters

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Negotiation techniques should include but are not limited to:**

- using strategic questioning and listening to gather information and direct the focus of people involved
- use of positive, confident and cooperative language
- control of tone of voice and body language
- using language and concepts appropriate to the people involved
- using clear presentations of options and consequences
- demonstrating flexibility and willingness to negotiate
- using summarising of positions and agreements to move understanding

**Risk management plan may describe:**

- the process which will be used to identify, analyse and manage risks both initially and throughout the life of the project
- how often risks will be reviewed, the process for review and who will be involved
- who will be responsible for which aspects of risk management
- how risk status will be reported and to whom
- the initial snapshot of the major risks, current grading
- planned strategies for reducing likelihood and seriousness of each risk (mitigation strategies) and who will be responsible for implementing them

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Specialist advice may be sought from:**

- management
- valuers
- architects
- planners
- solicitors
- real estate agents
- technical experts
- government officials



**Communication techniques  
may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Evaluation methods could  
be qualitative or  
quantitative and may  
include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Business  
equipment/technology may  
include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- consulting with relevant people, conducting a risk analysis, and interpreting sourced information and data to accurately establish management agreement requirements
- preparing a management agreement within required timeframes incorporating strategies addressing risk management, insurance coverage and resource requirements
- organising appropriate resources and support processes in accordance with budget parameters
- using evaluation techniques to review project processes and implementing recommendations for improvement

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- relevant property and services legislation
- building codes and relevant Australian Standards
- risk management associated with property use
- contracts law and property use
- administration of property usage plans
- lease rights and responsibilities
- risk analysis techniques
- project management concepts and principles
- monitoring and evaluation systems

**Required skills and attributes include:**

- planning skills to:
  - organise and document management agreement development processes
- organisational skills to:
  - schedule and meet timelines and client requirements
  - establish resource and support processes
- analytical skills to:
  - interpret information
  - assess risk
  - estimate costings and budget needs
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- interpersonal skills to:
  - review and evaluate agreement
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - prepare documentation

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining requirements and developing the management agreement, to organising resources and reviewing processes
- evidence must include documentation showing consultation undertaken, risk analysis and planning and evaluation activities for at least two management agreements

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD522A****Coordinate facilities and amenities for property users****Unit Descriptor**

This competency standard specifies the outcomes required to provide facilities and amenities and associated services for property users. It requires the ability to accurately establish the need for facilities and amenities and coordinate the planning, implementation and review of services.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Determine facilities and amenities requirements       | <ul style="list-style-type: none"> <li>1.1 <i>Facilities and amenities</i> requirements are identified in consultation with <i>relevant people</i> and using appropriate research and survey techniques</li> <li>1.2 <i>Client</i> needs are accurately assessed and clarified using appropriate <i>consultative processes</i> in accordance with <i>organisational requirements</i></li> <li>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are reviewed to ensure facilities and amenities comply with requirements</li> <li>1.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul>   |
| 2. Plan for provision of service                         | <ul style="list-style-type: none"> <li>2.1 Provision of facilities and amenities is planned in accordance with client and organisational requirements</li> <li>2.2 Project strategies, objectives and timelines are negotiated and agreed in consultation with client and other relevant people</li> <li>2.3 Monitoring and reporting arrangements for project activities are established and documented in line with client requirements</li> <li>2.4 Financial, physical and human <i>resource</i> requirements are identified and arranged in accordance with project plan and organisational procedures</li> <li>2.5 Risk management plan to identify, assess and control risks is prepared and incorporated into project plan in accordance with legislative and organisational requirements</li> <li>2.6 Relevant approvals are obtained within the designated timeframe in accordance with legislative and organisational requirements</li> </ul> |
| 3. Coordinate implementation of facilities and amenities | <ul style="list-style-type: none"> <li>3.1 Facilities and amenities are implemented in accordance with agreed project plan, approvals and organisational requirements</li> <li>3.2 All equipment and services are provided in accordance with manufacturer/supplier and legislative requirements</li> <li>3.3 <i>Contingency</i> arrangements for implementation of facilities and amenities are identified and activities planned to maximise quality outcomes</li> <li>3.4 Expenditure and resource usage is monitored and controlled to ensure objectives are achieved within specified budgetary parameters</li> <li>3.5 Regular reports on progress and outcomes are provided to relevant people in accordance with project plan</li> </ul>   |

4. Review effectiveness of facilities and amenities
- 4.1 Systematic review processes and established *evaluation methods* are used to evaluate the effectiveness of facilities and amenities
  - 4.2 *Feedback* from *users* is used to confirm quality of facilities and amenities and identify areas for future improvement in accordance with organisational procedures
  - 4.3 Identified non-conformances and non-compliances are documented and referred for action in accordance with organisational requirements
  - 4.4 Evaluation results and recommendations for improvements to processes are prepared in required format, style and structure and presented to relevant people within agreed timeframes
  - 4.5 *Business equipment/technology* is used to maintain relevant documentation in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations and communicating project progress	3
Collecting analysing and organising information	using documentation and relevant legislation to implement and monitor facilities and amenities	3
Planning and organising activities	scheduling, coordinating, monitoring and evaluating the provision of facilities and amenities	3
Working with others and in teams	collaborating with users to obtain feedback on service provision	2
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	identifying non-conformances, problems and delays	3
Using technology	using planning and scheduling software and preparing reports	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Facilities and amenities may relate to:**

- child care
- recreation
- meeting places
- car services
- security services
- minding services
- business support

**Relevant people may include:**

- management/colleagues
- users
- principals
- service providers
- builders
- architects
- clients
- legal representatives
- industry professionals and associations

**Clients may include:**

- property owners
- property agents
- building supervisors
- project managers
- government and legal instruments/agencies
- private investors
- internal/external property groups
- institutions
- funds providers
- company management
- insurers
- risk assessors
- legal advisers

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant documentation may include:**

- certificates of occupancy
- leases
- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements



**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Contingencies may relate to:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractor
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from management and/or colleagues
- comments from clients and/or legal representatives
- personal, reflective behaviour strategies
- workplace assessment

**Users may include:**

- tenants
- customers
- clients
- owners
- managers
- agents
- general public

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying facilities and amenities requirements through consultation with client and others and reviewing of documentation
- planning the provision of facilities and amenities incorporating strategies for monitoring and reporting, risk management, resource needs and gaining of necessary approvals
- coordinating the implementation of facilities and amenities ensuring equipment and services meet manufacturer/supplier specifications and expenditure and resource use is monitored against budgets
- evaluating the effectiveness of facilities and amenities including feedback from user and making recommendations for improvements to processes

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- planning methods and techniques
- types of facilities and amenities within the property industry
- industry benchmarks on performance levels

**Required skills and attributes include:**

- research and evaluation skills to:
  - source facilities and amenities information and resource requirements
  - use survey techniques
  - review and evaluate processes
- organisational skills to:
  - schedule and meet timelines and client requirements
  - plan, complete and review project processes
- analytical skills to:
  - interpret documentation
  - assess risk
  - estimate costings and budget needs
  - provide cost analysis applied to services provision
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes
  - design monitoring systems and processes

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying facilities and amenities requirements to planning, implementing and reviewing the provision of services
- evidence must include documentation for at least two facilities and amenities provision projects including project plans, budgets, risk assessment and evaluation reports

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD523A****Unit Descriptor****Advise on facilities use and design**

This competency standard specifies the outcomes required to provide effective advice on the use and design of facilities to meet client needs. It requires the ability to research and monitor facilities to identify future processes for meeting facilities requirements.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |  |
|---------------------------------------|--|
| 1. Identify facilities requirements   | <ul style="list-style-type: none"> <li>1.1 <i>Facilities</i> requirements are identified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Client needs</i> are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></li> <li>1.3 Relevant documentation and <i>legislative requirements</i> are accessed to ensure facilities comply with requirements</li> <li>1.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational requirements</li> </ul>  |
| 2. Conduct analysis on facilities     | <ul style="list-style-type: none"> <li>2.1 <i>Information</i> and data is gathered and organised in a format suitable for analysis and interpretation in accordance with organisational requirements</li> <li>2.2 Reliable methods are used to collect information in accordance with organisational requirements are implemented</li> <li>2.3 Relevant people are consulted to gather additional data using appropriate communication techniques</li> <li>2.4 Information is analysed using reliable and valid <i>data analysis</i> methods in accordance with organisational requirements</li> <li>2.5 Assumptions and conclusions are supported by verifiable evidence and are consistent with research objectives</li> </ul>           |
| 3. Provide advice and recommendations | <ul style="list-style-type: none"> <li>3.1 Clients are provided with clear <i>recommendations</i> on facilities use and design services to meet their identified needs</li> <li>3.2 <i>Feedback</i> and comments on suitability and sufficiency of recommendations is obtained in accordance with organisational requirements</li> <li>3.3 Advice and recommendations are <i>presented</i> in an appropriate format, style and structure using business technology</li> <li>3.4 Future services required by client are identified and delivery is planned in consultation with relevant personnel</li> <li>3.5 Relevant documentation is completed and processed in accordance with legislative and organisational requirements</li> </ul> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client needs	3
Collecting analysing and organising information	sourcing, assessing and testing information on facilities use	3
Planning and organising activities	conducting analysis on facilities information to identify performance and trends	3
Working with others and in teams	receiving feedback on the effectiveness of client advice	2
Using mathematical ideas and techniques	calculating the performance of a range of facilities and measure against client requirements	2
Solving problems	addressing anticipated problems or complex client needs through the assistance of specialist advice	3
Using technology	sourcing, assessing and preparing client advice or recommendations	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Facilities may include:

- child care centres
- sport and recreation venues
- offices
- educational facilities
- meeting places
- car services
- security services
- community centres

**Relevant people may include:**

- engineers and technicians
- technical experts
- management/colleagues
- clients
- legal representatives
- tenants
- property owners
- agents

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Client needs may relate to:**

- political and social issues
- financial performance
- workforce productivity
- organisational culture, structure and value process
- organisational physical infrastructure
- organisational industry direction

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Information may include:**

- company asset documents and registers
- reports and inventories
- depreciation schedules
- master planning documents
- capital management plans
- landscape planning documents
- risk management plans
- conservation plans
- environmental, energy, and safety plans and guidelines
- urban design studies
- qualitative and/or quantitative data
- financial documents

**Data analysis methods may include:**

- quantitative and/or qualitative
- explorative, descriptive, causative or predictive, and may include:
  - probability analysis
  - computer modelling
  - time series recognition
  - mathematical calculations
  - critical analysis
  - problem solving

**Recommendations may include:**

- new assets
- security
- energy efficiency measures
- waste disposal measures
- disposal of assets
- information technology
- development of plans
- feasibility studies
- funding options
- the potential for sale, sublease, out-lease, or lease termination
- improvements to the quality of the workspace for employees
- refurbishment/fit-out
- new building/landscape design
- relocation
- space use and allocation



**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- comments from clients/colleagues
- regular meetings

**Presentation of advice may incorporate use of:**

- company logo/letterhead
- tables and charts
- particular software application
- graphics and pictures
- standardised forms

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- identifying client needs through consultation with client and others and reviewing of documentation
- accessing and comparing a range of information and statistical data to determine performance of facilities
- evaluating the effectiveness of facilities including feedback from clients and making recommendations for future use and design
- following organisational and legislative procedures when giving advice

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- adaptive reuse and implications for business continuity
- future proofing strategies such as flexible space planning and technology provision
- organisational and professional procedures, ethical practices and business standards
- change management principles and practice
- environmental auditing aimed at effective facility operation
- heritage implications and legislative constraints
- value analysis and benchmarking techniques
- a range of decision making tools
- methodology formulation and analysis techniques

**Required skills and attributes include:**

- analytical skills to:
  - observe, dissect and understand
  - apply statistical methods and techniques
  - identify problems and find innovative solutions
  - evaluate existing facilities
- appraisal skills to:
  - assess merit of solutions
  - synthesise a wide range of acquired knowledge and experience when making recommendations
- communication skills to:
  - impart knowledge, ideas and concepts through oral, written and visual means
- technology skills to:
  - process information
  - utilise information technology systems
- research skills to:
  - source, analyse and interpret financial information
  - formulate conclusions which contribute to existing knowledge concerning advanced practice
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying facility requirements, conducting analysis to providing advice and recommendations
- evidence must include facility operational analysis, including budget estimates, feedback from clients and colleagues, formulation and presentation of recommendations, collected information and methods used for analysis

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD524A****Unit Descriptor****Monitor performance of property/facility portfolio**

This competency standard specifies the outcomes required to monitor the ongoing performance of a property/facility portfolio. It requires the ability to provide advice and recommendations to the client based on an accurate analysis of investment performance.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |   |
|---------------------------------------|---|
| 1. Determine performance requirements | <p>1.1 <i>Performance</i> requirements are identified in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.2 <i>Client needs and expectations</i> are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></p> <p>1.3 <i>Source documents</i> and <i>legislative requirements</i> are obtained and assessed to ensure that information is accurate and reliable in accordance with organisational requirements</p> <p>1.4 Situations requiring <i>specialist advice</i> are identified and assistance sought as required in accordance with organisational procedures</p>   |
| 2. Monitor performance                | <p>2.1 <i>Performance of portfolio</i> is regularly monitored to ensure it meets client objectives and relevant organisational and legislative requirements</p> <p>2.2 Assessment processes are designed which detail the assessment method that will accurately reflect client needs and organisational requirements</p> <p>2.3 Trends and <i>market conditions</i> are identified and evaluated against <i>industry benchmarks</i> to determine performance of portfolio</p> <p>2.4 Variations in performance expectations are promptly identified and explained to relevant people</p> <p>2.5 Methods for assessing performance are reliable and make efficient use of time and resources in accordance with organisational requirements</p> |
| 3. Provide advice and recommendations | <p>3.1 Clients are provided with clear advice and <i>recommendations</i> on whether performance of portfolio meets their identified needs and expectations</p> <p>3.2 Advice and recommendations are supported by verifiable evidence and are consistent with monitoring objectives and client requirements</p> <p>3.3 Advice and recommendations are presented in an appropriate format, style and structure using <i>business equipment/technology</i></p> <p>3.4 <i>Feedback</i> on suitability and sufficiency of advice and recommendations is obtained from relevant people</p> <p>3.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</p>                  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining performance expectations and providing recommendations and advice	3
Collecting analysing and organising information	sourcing property data and analysing performance against industry trends	3
Planning and organising activities	coordinating, monitoring and evaluating assessment processes	3
Working with others and in teams	obtaining feedback on suitability of advice and recommendations	2
Using mathematical ideas and techniques	applying statistical and probability calculations	2
Solving problems	promptly addressing variations in performance expectations	2
Using technology	researching and analysing information, and preparing and presenting recommendations	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Performance may relate to:

- concepts
- plans
- strategies and placement of capital in property for investment
- productive use
- customer service outcomes

**Relevant people may include:**

- management/colleagues
- clients
- analysts
- legal representatives
- industry professionals and associations
- government personnel
- legal representatives
- taxation specialists
- accountants

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- occupational health and safety (OHS) policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Clients may include:**

- financial institutions
- investment organisations
- funds managers
- internal/external property groups
- partners
- joint ventures
- unit trustees
- owner occupiers
- developers

**Client needs and expectations may relate to:**

- immediate capital gains
- long-term capital gains

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Source documents may include:**

- government statistics
- reports and inventories
- business plans
- marketing plans
- property valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Specialist advice may be sought from:**

- valuers
- architects
- environmental auditors
- investment consultants
- builders
- bankers and financiers
- solicitors
- real estate agents
- technical experts
- government officials
- industry professionals and associations

**Performance of portfolio may be influenced by:**

- type of property/facility
- change to organisational structure
- return versus risk, return on investment
- geographic aspects
- capital growth versus short-term gain
- limits to financial resources
- gearing possibilities
- cash flows
- capacity to improve asset
- taxation considerations
- demographics

**Market conditions may relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Recommendations may include:**

- refitting
- renovation
- representation
- redevelopment
- rebuilding
- refurbishment/fit-outs
- repackaging
- new finance arrangements
- new tenant/lease arrangements

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners



**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- comments from legal representatives
- regular meetings

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- conducting research of relevant documentation and legislation and accurately determining client performance expectations through consultation
- developing an assessment process and measuring performance of portfolio against set criteria
- monitoring portfolio performance using data analysis methods and identifying variations in performance expectations
- providing advice and recommendations to clients based on a comprehensive evaluation of portfolio performance, including feedback using business equipment/technology

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to lease arrangements, OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry practice and benchmarks
- risk management associated with property/facility performance
- contracts law and property/facility performance
- administration of property/facility usage plans
- lease rights and responsibilities
- local property market conditions and overall trends in the industry
- a range of research methods and analysis techniques

**Required skills and attributes include:**

- communication skills to:
  - clarify ideas and perspectives
  - interpret written and oral information
  - negotiate client and tenant requirements
  - interpret property/facility plans
  - complete documentation and report findings
- technical skills to:
  - use property/facility software
  - formulating reports
- analytical skills to:
  - interpret property/facility plans
  - assess property/facility performance
  - research property/facility application and usage and benchmark for optimisation
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining portfolio performance requirements to monitoring and assessing performance and providing advice and recommendations to client
- evidence must include copies of documentation showing how client needs were verified, a range of sourced information, use of data analysis techniques to research and analyse portfolio performance, and documented recommendations

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD525A****Unit Descriptor****Implement facilities management plan**

This competency standard specifies the outcomes required to implement a facilities management plan. It requires the ability to establish implementation activities and priorities, and schedule and monitor support processes to ensure effective and quality implementation processes.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Identify facilities management requirements | <p>1.1 <i>Facilities management plan</i> is interpreted to establish implementation activities and priorities in consultation with <i>relevant people</i> in accordance with <i>organisational requirements</i></p> <p>1.2 An <i>implementation plan</i> incorporating strategies, objectives and timelines for implementation are negotiated and agreed in consultation with relevant people</p> <p>1.3 Monitoring and reporting arrangements for implementation activities are established and documented in line with organisational procedures</p> <p>1.4 <i>Risk management plan</i> to identify, assess and control risks is incorporated into implementation plan in accordance with organisational and <i>legislative requirements</i></p>  |
| 2. Organise support processes                  | <p>2.1 <i>Resource</i> requirements are determined and organised in accordance with the implementation plan and organisational requirements</p> <p>2.2 <i>Targets and milestones</i> are identified and linked to the achievement of outcomes in accordance with the implementation plan</p> <p>2.3 Documentation and checklists associated with the implementation of the facilities management plan are prepared in established formats and distributed to relevant people</p> <p>2.4 Information related to the implementation of the asset management plan is promptly distributed using established <i>communication channels</i></p> <p>2.5 <i>Contingency</i> arrangements for the implementation of the facilities management plan are identified and activities planned to maximise quality outcomes</p> |
| 3. Monitor implementation of plan              | <p>3.1 Progress is systematically monitored and variations to implementation of the facilities management plan are verified as required with relevant people</p> <p>3.2 Expenditure and resource usage is monitored and controlled to ensure objectives are achieved within specified parameters</p> <p>3.3 <i>Coaching and mentoring</i> assistance is provided to colleagues as required to overcome difficulties throughout implementation process</p> <p>3.4 Systems, records and reporting procedures are maintained in accordance with organisational and legislative requirements</p>  |

4. Evaluate implementation of plan
- 4.1 Regular reports on progress and outcomes are provided to relevant people to ensure completion of activities are in line with implementation plan
  - 4.2 Systematic review processes and established *evaluation methods* are identified and used to evaluate implementation processes and outcomes
  - 4.3 Evaluation results are prepared in the required format, style and structure and presented to relevant people within agreed timeframes
  - 4.4 Recommendations for improving implementation processes are presented to relevant people in accordance with organisational requirements
  - 4.5 Relevant documentation is completed and processed in accordance with legislative and organisational procedures

### KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting to confirm facilities management requirements	3
Collecting analysing and organising information	monitoring and reporting on implementation progress	3
Planning and organising activities	planning work activities and organising support processes within timeframes and budget parameters	3
Working with others and in teams	establishing roles and responsibilities for the implementation of the facilities management plan activities	2
Using mathematical ideas and techniques	monitoring and assessing performance against implementation plan	2
Solving problems	analysing actual or potential project risks and providing practical contingency solutions	2
Using technology	applying facility management software	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Facilities may include:**

- child care centres
- recreational facilities
- sport and recreation venues
- offices
- educational facilities
- meeting places
- car services
- security services
- community facilities

### **Facilities management plan may outline areas such as:**

- long-term financial (capital and maintenance) forecasts
- funding strategies
- performance benchmarking recommendations and measurement processes
- risk management processes
- environment plans
- buildings, minor works, site works and landscaping planning guidelines
- lifecycle management plans
- infrastructure for and supply of utilities such as energy, water, and sewerage
- control of traffic and parking
- building and engineering maintenance, cleaning services, security services and landscape maintenance
- quality standards for furniture

### **Relevant people may include:**

- engineers and technicians
- technical experts
- sub-contractors
- colleagues
- emergency personnel
- occupational health and safety (OHS) representatives
- legal representatives
- industry professionals and associations
- tenants
- financial institutions

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Implementation plan may include:**

- a formal structure against which progress can be evaluated
- budgets and time-tables which enable the commitment of resources at appropriate points
- contingency plans to cater for changes or significant difficulties
- acquisition strategies
- consultation strategies to involve stakeholders
- transition plans
- specifications
- quality assurance procedures
- objectives, scope and expected benefits

**Risk management plan may describe:**

- processes used to identify, analyse and manage risks
- how often risks will be reviewed, the process for review and who will be involved
- who will be responsible for which aspects of risk management
- how risk status will be reported and to whom
- the initial snapshot of the major risks, current grading
- planned strategies for reducing likelihood and seriousness of each risk (mitigation strategies) and who will be responsible for implementing them

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resources may relate to:**

- specialist advice
- contractors
- technicians
- planning documents
- feedback processes
- communication protocols
- equipment
- materials
- training

**Targets and milestones may include:**

- agreed reporting requirements
- measurement/achievement of set outcomes
- completion of key tasks/project phases
- progress reports

**Documentation may include information relating to:**

- budgets and operating costs
- company services
- master plans
- sub-plans (eg environment, human resource management, marketing)
- policy/management procedures
- current and planned developments
- legal documentation
- property leases, plans or contracts
- service/maintenance records

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractor
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints



**Coaching and mentoring assistance may include:**

- providing feedback to another team member
- fair and ethical practices
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- preparing a detailed implementation plan which incorporates strategies addressing risk management, resource needs, monitoring and reporting arrangements and quality assurance controls
- analysing risks and developing a plan to manage and control risks associated with the implementation of the facilities management plan
- organising resources and developing checklists to assist in the implementation of the facilities management plan
- evaluating the implementation of the facilities management plan through consultation and preparing systematic progress reports

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- building services and operation methods and practices
- industry performance benchmarks including use and application of value analysis and benchmarking techniques
- organisational and professional procedures, ethical practices and business standards
- project management concepts and principles
- continuous improvement processes
- organisational quality systems such as:
  - strategic planning processes
  - recording systems

**Required skills and attributes include:**

- leadership skills to:
  - take a leading role in a variety of situations
  - motivate people
  - pursue new challenges and opportunities
- technology skills to:
  - calculate resources
  - process information
  - use project planning and scheduling software
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- planning skills to:
  - logically sequence project activities
  - plan and document strategies to implement plans
  - set goals and meet time constraints
- analytical skills to:
  - interpret documentation
  - estimate resource and time requirements
- problem solving skills to:
  - promptly identify potential barriers to implementation strategies
  - analyse risks and establish contingencies
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying facilities management requirements to developing, monitoring and evaluating implementation of plan
- evidence must include an implementation plan outlining specific priorities, timelines and required resources determined through analysis of facilities management plan, risk management plan, identification of recording and reporting requirements including associated roles and responsibilities and progress documentation outlining contingency planning and reporting within set timeframes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD526A****Unit Descriptor****Coordinate facilities procurement system**

This competency standard specifies the outcomes required to coordinate a purchasing system for goods and services. It requires the ability to follow established procurement principles to identify and implement procurement system processes and support mechanisms.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Determine procurement system requirements | <p>1.1 <i>Procurement</i> system requirements and objectives are determined in consultation with <i>relevant people</i> in accordance with <i>organisational and legislative requirements</i></p> <p>1.2 <i>Relevant documentation</i> is sourced and interpreted to establish contractual, organisational and legislative requirements</p> <p>1.3 <i>Quality assurance goals and strategies</i> and <i>performance measures</i> are determined for incorporation into implementation processes</p> <p>1.4 <i>Analysis</i> is undertaken of supply market to identify <i>factors which may impact on procurement processes and decisions</i></p> <p>1.5 <i>Risk</i> assessment is conducted on expected procurement system outcomes in accordance with organisational procedures</p>  |
| 2. Organise support processes                | <p>2.1 Procurement support processes are determined and organised in accordance with procurement system objectives and organisational requirements</p> <p>2.2 <i>Targets and milestones</i> are identified and linked to the achievement of procurement system objectives in accordance organisational procedures</p> <p>2.3 Appropriate <i>communication channels</i> are used to inform relevant people of procurement system processes and obtain <i>feedback</i> in accordance with organisational requirements</p> <p>2.4 <i>Roles and responsibilities</i> associated with the implementation of the procurement system are clearly defined and documented</p> <p>2.5 Monitoring and reporting arrangements and delegations for procurement activities are determined and documented in accordance with organisational requirements</p> |
| 3. Implement procurement system              | <p>3.1 Procurement system is implemented within agreed timeframes in accordance with organisational and legislative requirements</p> <p>3.2 <i>Sub-plans</i> are reviewed and implemented in accordance with procurement system objectives and organisational and legislative requirements</p> <p>3.3 Procurement processes are documented in established formats using <i>business equipment/technology</i> and distributed to relevant people</p> <p>3.4 Situations requiring <i>specialist advice</i> are identified and assistance sought where appropriate in accordance with organisational requirements</p>  |

4. Review procurement system
- 4.1 Systematic review processes and established *evaluation methods* are identified and used to evaluate procurement system processes and outcomes
  - 4.2 Evaluation methods for measuring performance of supply markets are reliable and make efficient use of time and resources in accordance with organisational requirements
  - 4.3 *Opportunities for improvement* to procurement system are assessed and recommendations presented to relevant people in accordance with organisational requirements
  - 4.4 All information is securely maintained in accordance with legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting with relevant people to determine procurement system requirements and objectives	3
Collecting analysing and organising information	sourcing and analysing strategic plans and relevant market factors	3
Planning and organising activities	developing monitoring and reporting arrangements for procurement activities	3
Working with others and in teams	obtaining feedback on procurement system processes	2
Using mathematical ideas and techniques	undertaking risk analysis	2
Solving problems	identifying areas for improvement to procurement system	3
Using technology	preparing recommendations	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Procurement may include:**

- leasing, buying
- short-term or long-term arrangements
- sole or multiple suppliers
- maintenance and support arrangements
- incentive contracting
- franchising
- research and development
- pre-qualification of suppliers
- standing orders
- standard form agreements
- common use contracts
- facilities management
- prime contractor/sub-contractor
- gainsharing/open book

### **Relevant people may include:**

- managers
- technical experts
- colleagues
- clients
- legal representatives
- industry professionals and associations
- tenants
- property/facilities owners/managers
- agents
- government personnel

### **Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Relevant documentation may relate to:**

- procurement guidelines, practices and policies
- organisational and business strategic plans and sub-plans
- contracts and tender documentation
- register of suppliers
- quotations and invoices
- facility/asset management plans
- maintenance plans and strategies
- budgets and operating costs
- goods and services
- policy/management procedures
- legal documentation
- tenancy and other contracts
- property drawings

**Procurement process may include:**

- open quotations
- tendering (both complying and non-complying)
- advertisement
- register of suppliers
- direct appointments

**Information may relate to:**

- sub-plans
- relevant project contracts
- facility/asset management plans
- maintenance plans and strategies
- budgets and operating costs
- services
- policy/management procedures
- current and planned property/site developments
- legal documentation
- tenancy and other contracts
- property drawings

**Quality assurance goals and strategies may include:**

- reporting procedures and protocols
- procedures for monitoring and evaluating procurement requirements and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders
- budgets and time-tables which enable the commitment of resources at appropriate stages
- contingency plans to cater for a change of corporate focus or significant resource difficulties

**Performance measures may include:**

- quantitative
- qualitative
- statistical
- non-statistical
- financial
- non-financial

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Factors that may impact on procurement processes and decisions may relate to:**

- supply market capacity, structure, maturity and strength
- factors/conditions which may affect supply
- potential impact of intended contracting activity
- level of risk, complexity and sensitivity
- leasing instead of up-front capital investment
- strategic/tactical issues
- political imperatives and strategies
- budgetary constraints
- collaborative arrangements
- industry involvement requirements
- environmental issues



**Risks may relate to:**

- suppliers and contractors
- contracts and tenders
- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- changes to regulations and legislation
- time constraints
- emergencies and disasters

**Targets and milestones may include:**

- agreed reporting requirements
- measurement/achievement of set outcomes
- completion of key tasks/project phases
- progress reports

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

**Roles and responsibilities may be influenced by:**

- job description and employment arrangements
- organisational policy relevant to work role
- team structures
- supervision and accountability requirements including OHS
- skills, training and competencies
- Codes of Conduct

**Sub-plans may relate to :**

- market evaluation
- bid evaluation
- contract negotiation
- risk management
- contingency
- communication/public relations
- human resource management
- disposal
- contract review
- environment/green issues
- industry policy

**Business equipment/  
technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers and photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Specialist advice may be  
sought from:**

- managers
- authorised delegations
- clients
- legal, functional, technical experts
- agents

**Evaluation methods could  
be qualitative or  
quantitative and may  
include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Opportunities for  
improvement may be  
assessed for:**

- cost effectiveness
- ability to add value
- ability to improve customer satisfaction
- practicality
- viability
- ease of implementation
- degree of management support

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining procurement system requirements and objectives by interpreting relevant documentation and analysing supply market factors and quality assurance goals and strategies
- using appropriate communication channels to identify roles, timelines and reporting arrangements to support implementation of procurement system
- implementing procurement system within agreed timeframes and reviewing sub-plans to ensure implementation complies with procurement system objectives
- using established evaluation methods to review procurement system processes and outcomes and incorporating recommendations for improvement

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- key principles of procurement, including:
  - value for money
  - open and effective competition
  - accountability and recording
  - ethics and fair dealing
  - planning and professionalism
- implications of warranties, guarantees and exclusions
- whole of life costing and price-quality relationship issues
- limitations of work role, responsibility and professional abilities
- relevant Acts, regulations and Australian Standards
- tendering and contracting processes, including a range of contractual arrangements
- benefits and risks of a range of procurement options such as lease purchase, sale and leaseback, and term contract
- user needs and requirements for facilities
- organisations policies and procedures for employment/tendering of services and procurement
- risk management strategies relating to managing suppliers
- best practice procurement principles

**Required skills and attributes include:**

- research skills to:
  - source and identify market factors that may affect procurement
  - source relevant documentation
- technology skills to:
  - maintain a database of information about suppliers
  - prepare reports and recommendations
- evaluation skills to:
  - assess risk
  - analyse supply market
  - review procurement system
- organisational skills to:
  - schedule activities
  - determine appropriate timeframes
- communication skills to:
  - interpret written and oral information
  - discuss and confirm procurement arrangements
  - obtain feedback
  - liaise with suppliers
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining procurement system requirements to implementing and reviewing procurement system and support processes
- evidence must include a market analysis, procurement documentation that includes performance measures, evaluation of procurement processes and risk assessment

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD527A****Unit Descriptor****Coordinate facilities construction/renovation**

This competency standard specifies the outcomes required to coordinate the construction/renovation of facilities. It requires the ability to use appropriate consultative processes to determine requirements and develop, monitor and finalise a construction plan.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Determine construction/renovation requirements | <p>1.1 <i>Construction drawings</i> are reviewed and confirmed with <i>relevant people</i> as required in accordance with <i>project requirements</i></p> <p>1.2 <i>Consultative processes</i> are used to negotiate and confirm construction requirements with <i>contracted parties</i> in accordance with <i>organisational requirements</i></p> <p>1.3 <i>Site access and specific site requirements</i> are identified and appropriate arrangements made as required in accordance with client, organisational and <i>legislative requirements</i></p> <p>1.4 Construction plan is prepared and <i>contingencies</i> planned to ensure contract and organisational requirements are met</p> |
| 2. Organise resources and support processes       | <p>2.1 Provision of financial, physical and human resources is planned in accordance with client and organisational requirements</p> <p>2.2 Construction strategies, objectives and timelines are negotiated and agreed in consultation with the client and relevant people</p> <p>2.3 Monitoring and reporting arrangements for construction activities are established and documented in accordance with organisational requirements</p> <p>2.4 Relevant approvals are obtained within the designated timeframe in accordance with legislative and organisational requirements</p>   |
| 3. Arrange contractors and consultants            | <p>3.1 <i>Contractors</i> and consultants are arranged to undertake construction in accordance with legislative and organisational requirements</p> <p>3.2 <i>Tendering and selection methods</i> are chosen to meet client, organisational procurement guidelines and legislative requirements</p> <p>3.3 Contracted services are relevant to the construction work to be undertaken and client requirements</p> <p>3.4 <i>Documentation</i> regarding reporting arrangements and deliverables is finalised in accordance with organisational and legislative requirements</p>  |

- |  |   |
|--|---|
| 4. Monitor construction/renovation processes | 4.1 Construction/renovation is monitored against construction plan to ensure completion occurs within designated timeframes<br>4.2 Factors affecting the achievement of scheduled work are promptly identified and required variations to schedules are negotiated and agreed with relevant people<br>4.3 Established <i>communication channels</i> and processes are used to ensure an accurate exchange of information throughout operations<br>4.4 Situations requiring <i>specialist advice</i> are identified and appropriate support sought as required |
| 5. Finalise construction/renovation process  | 5.1 <i>Notification</i> of completed construction is received and checked against client and organisational requirements<br>5.2 Inspection is arranged to confirm facilities are fully operational and meet required specifications and industry standards<br>5.3 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	negotiating construction requirements and consultant/contractor arrangements	3
Collecting analysing and organising information	researching construction documentation and checking work performed against work schedules	3
Planning and organising activities	coordinating and scheduling construction/renovation processes	3
Working with others and in teams	collaborating with relevant people to coordinate construction processes and seeking specialist advice as required	3
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	2
Solving problems	addressing variations to contracts and work schedules	2
Using technology	selecting and using software for planning and scheduling and preparing reports	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Construction may include:**

- use of fixed price
- cost plus
- design and construct
- construct only
- involvement of more than one builder

**Construction drawings may include:**

- detailed architect drawings
- working drawings
- engineers' drawings
- detail drawings
- specifications

**Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- colleagues
- clients
- occupational health and safety (OHS) representatives
- legal representatives
- industry professionals and associations
- tenants
- investors
- property owners
- agents
- government agencies

**Project may involve:**

- creation of an asset
- fitting out of new structures
- modification of existing structures

**Consultative processes may include:**

- face-to-face meetings
- telephone communication
- facsimile communication
- written communication
- email communication

**Contracted parties may include:**

- builders
- subcontractors
- project managers
- other special consultants
- investors
- financial institutions



**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Site access and specific site requirements may relate to:**

- access points, time of access
- access codes, keys, passes, security clearances
- union requirements
- OHS requirements
- building codes and regulations
- heritage listings
- noise control
- environmental issues

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Contingencies may include:**

- industrial disputes
- building delays
- public holidays and shut-down periods
- competing work demands of contractors and consultants
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls
- variations in market conditions
- environmental factors (time, weather)
- non-availability of resource and materials
- budget constraints

**Contractors may include:**

- one builder
- multiple builders
- service providers

**Tendering and selection methods may include:**

- public tender
- open quotations
- compulsory competitive tender
- advertisement
- selective tender
- register of consultants
- direct appointment

**Documentation may include:**

- schedules
- contracts
- logs of equipment/system problems/faults
- warranty conditions and allowances
- operational checks and maintenance conducted
- costings, receipts, invoices
- property leases, plans or contracts
- planning permits
- certifications
- inspection certificates
- progress reports
- handover documentation

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations

**Notification may include:**

- handover documentation
- certification
- certificate of occupancy

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- ascertaining construction requirements and developing a construction plan through research and consultation
- making available appropriate resources to support the construction process
- preparing selection schedule and criteria, and arranging people to be involved in the contract process by following organisational procurement procedures
- monitoring construction processes using project management methodologies and developing and communicating appropriate contingency plans
- negotiating variations and adjustments to work schedules
- arranging inspections and preparing and collating documentation relating to finalisation of contract requirements using business technology

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- implications of warranties, guarantees and exclusions
- whole of life costing and price-quality relationship issues
- limitations of work role, responsibility and professional abilities
- building control legislation, codes and relevant Australian Standards
- regulations and legislation affecting property investments
- building construction practice, principles and processes
- contract law applied to building contracts
- consultant roles and capabilities
- project planning and scheduling

**Required skills and attributes include:**

- research skills to:
  - source information and resource requirements
- organisational skills to
  - plan and arrange construction/renovation work
  - schedule and meet timelines and client requirements
  - manage risk
- technical skills to:
  - schedule tasks and report outcomes
  - design monitoring systems and processes
- decision making skills to:
  - select appropriate contractual arrangements
  - determine appropriate procurement options
- communication skills to:
  - interpret written and oral information
  - complete documentation
  - negotiate client requirements, variations and adjustments to construction processes
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from accurately determining construction requirements, arranging contractors and consultants to monitoring and finalising construction and/or renovation processes
- evidence must include at copies of construction work schedules, contracts and tender documentation, monitoring/reporting arrangements, construction plan, finalisation documentation including inspection reports, procurement arrangements for obtaining resources, and a contingency plan

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD601A****Unit Descriptor****Prepare project design brief and documentation**

This competency standard specifies the outcomes required to prepare a design brief. It requires the ability to analyse specific site documentation, determine facility requirements, and establish design parameters and project costings.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                    |  |
|------------------------------------|--|
| 1. Determine facility requirements | <ul style="list-style-type: none"> <li>1.1 <i>Facility requirements</i> are confirmed and verified with <i>relevant people</i></li> <li>1.2 Relevant information, including applicable industry, <i>legislative and organisational requirements</i> is reviewed to ensure compliance with critical planning requirements</li> <li>1.3 Project objectives and timelines are developed, negotiated and confirmed in accordance with organisational policies and procedures</li> <li>1.4 Special client requirements are determined and expert industry advice sought as required</li> </ul>  |
| 2. Establish design concepts       | <ul style="list-style-type: none"> <li>2.1 <i>Design parameters</i> are established based on examination of research and feasibility data</li> <li>2.2 <i>Design documentation</i> and specifications are prepared in accordance with client and industry requirements</li> <li>2.3 Relevant codes and standards are examined to establish their impact on design concepts and human and environmental needs</li> </ul>  |
| 3. Prepare design brief            | <ul style="list-style-type: none"> <li>3.1 <i>Design brief</i> addresses client and project requirements and is prepared in an appropriate format for dissemination to relevant people</li> <li>3.2 Project costings are established and a <i>construction budget</i> negotiated and confirmed in consultation with relevant people</li> <li>3.3 Constructive <i>feedback</i> is reviewed and adjustments made to design brief as appropriate</li> <li>3.4 Final design brief is lodged within designated timelines and all relevant documentation securely maintained in accordance with organisational and legislative requirements</li> </ul> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	presenting information to clients and people involved in the design process	3
Collecting analysing and organising information	using documentation and relevant legislation to determine design parameters	3
Planning and organising activities	monitoring and reviewing the design process	3
Working with others and in teams	collaborating with industry experts to obtain advice and receive feedback	2
Using mathematical ideas and techniques	estimate and calculate costings	3
Solving problems	reviewing specifications and sourcing expert feedback	3
Using technology	using design and drawing software to test designs and specifications	3

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Facility requirements may relate to:**

- special purpose building
- aspect
- building useable space
- fit-out and finishes

**Relevant people may include:**

- valuers
- architects
- planners
- designers
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- quantity surveyors
- surveyors
- project management consultants
- clients
- tenants
- property owners

**Legislative, financial and procedural requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - occupational health and safety (OHS)
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements



**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Design parameters may relate to:**

- financial constraints
- tenancy possibilities
- maximum and best asset use
- aesthetics

**Design documentation may include:**

- plans and specifications
- forms of contracts
- schedules
- computer models
- artwork
- bills of quantity

**Design brief may include:**

- project concept and objective
- sketch plans and layouts
- user/client needs
- timelines
- estimated project costings
- preliminary cost limitations

**Construction budget may include:**

- costings of all component construction parts
- consultants' fees
- leases
- contingencies
- council fees
- development management fees
- other allowances

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - peers, colleagues and managers
- information provided by others involved in a professional capacity both internal and external to the organisation

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining facility design requirements and special client needs through consultation activities
- reviewing relevant codes and standards and developing design concepts that incorporate budget requirements and design parameters
- producing a design brief that clearly sets out requirements for completion of design
- determining design budget and project costings

**Required knowledge and understanding includes but is not limited to:**

- building codes and practices relating to fit-out
- planning and scheduling techniques and software
- industry practices and benchmarks for contracts
- organisational and professional procedures, ethical practices and business standards
- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- a range of building types and the use best suited to each type of building
- building structures, their benefits and drawbacks
- relevant Acts and regulations
- building control legislation, codes and relevant Australian standards
- building construction practice
- basic knowledge of property contracts and administrative requirements

**Required skills and attributes include:**

- organisational skills to:
  - plan and arrange activities to prepare a design brief
  - schedule and meet timelines
- literacy skills to:
  - read and interpret relevant design information, plans and specifications
  - prepare required documentation and information for those involved in design process
- communication skills to:
  - include relevant people in the design process
  - discuss issues that may impact on others
  - receive feedback and evaluate design brief
- technical skills to:
  - use planning and scheduling software
  - use and understand design software such as CAD
  - complete reports
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining facility requirements to preparing a design brief
- evidence must include a completed design brief that outlines budgets, proposed design concepts, documentation showing how facility and client requirements were identified and incorporated into design brief

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD602A****Develop strategic facilities/asset management plan****Unit Descriptor**

This competency standard specifies the outcomes required to develop and implement a facilities management plan which is consistent and appropriate. It requires the ability to measure the effectiveness of the facilities management plan using a variety of review and evaluation methods and to modify and implement corrective action strategies.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Establish facilities management requirements           | <ul style="list-style-type: none"> <li>1.1 <i>Facilities</i> management performance needs are determined and confirmed as required in consultation with <i>relevant people</i></li> <li>1.2 Risk assessment of facilities management outcomes is conducted and assessed in accordance with industry and organisational policies and procedures</li> <li>1.3 Relevant <i>industry benchmarks</i> are analysed to assess expected performance of <i>assets</i> in varying market conditions</li> <li>1.4 Applicable industry, <i>organisational and legislative requirements</i> are interpreted to establish user, contractual and legal compliance for facilities performance</li> </ul> |
| 2. Prepare plan   | <ul style="list-style-type: none"> <li>2.1 <i>Facilities management plan</i> includes aims and objectives and is prepared in appropriate format for dissemination to relevant people</li> <li>2.2 <i>Quality assurance goals and strategies</i> are established in accordance with facilities management plan</li> <li>2.3 Monitoring and reporting arrangements for facilities management plan are determined in line with client requirements</li> <li>2.4 <i>Lifecycle analysis</i> is undertaken and capital investment strategies are planned</li> </ul>  |
| 3. Organise resources and support processes               | <ul style="list-style-type: none"> <li>3.1 Financial, physical and human resource requirements are organised in accordance with facilities management plan</li> <li>3.2 <i>Information relating to implementation of facilities management plan</i> is promptly distributed using established <i>communication channels</i></li> <li>3.3 Facilities management methods are reliable and make efficient use of available time and resources</li> <li>3.4 <i>Roles and responsibilities</i> associated with implementation of facilities management plan are clearly defined and documented</li> </ul>   |
| 4. Review, evaluate and modify facilities management plan | <ul style="list-style-type: none"> <li>4.1 Facilities management plan is reviewed and evaluated in consultation with relevant people using appropriate <i>feedback strategies</i></li> <li>4.2 Systematic review processes are established and suitable <i>evaluation methods</i> used to evaluate facilities management plan outcomes</li> <li>4.3 Evaluation results are reviewed and recommendations for modification of plan and/or corrective actions incorporated as required in facilities management plan</li> <li>4.4 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</li> </ul>                  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	presenting information to clients and colleagues and explaining ideas and opinions in a structured way	3
Collecting analysing and organising information	sourcing relevant information and documentation to assess expected performance of asset	3
Planning and organising activities	organising financial, physical and human resource requirements sufficient to meet needs of facilities management plan	3
Working with others and in teams	collaborating with relevant people to generate ideas, obtain advice and receive feedback on review and evaluation of facilities management plan	3
Using mathematical ideas and techniques	analysing and interpreting numerical or statistical information to identify meaningful trends and patterns	3
Solving problems	implementing corrective action or modifying facilities management plan as required	3
Using technology	applying facility management software	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Facilities may include:

- child care centres
- sport and recreation venues
- offices
- educational facilities
- meeting places
- car services
- security services
- community facilities

**Relevant people may include:**

- engineers and technicians
- technical experts
- installers
- sub-contractors
- supervisors
- tradespeople
- colleagues
- clients
- emergency personnel
- designated occupational health and safety (OHS) representative
- site personnel
- legal representatives
- industry professionals and associations
- tenants
- property owners
- agents
- government personnel

**Industry benchmarks may relate to:**

- internal rates of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flows
- lifecycle costings

**Assets may be static or dynamic and include:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- consumer protection
- public health
- freedom of information
- strata, community and company titles
- tenancy agreements
- home building requirements

**Facilities management plan may include:**

- long-term financial (capital and maintenance) forecasts
- funding strategies
- asset management process and practice recommendations
- performance benchmarking recommendations and measurement processes
- risk management processes and practices
- environment plans and guidelines
- planning guidelines
- lifecycle management plans
- utilities plans and infrastructure such as energy, water, and sewerage
- building and engineering maintenance plans
- quality standards



**Quality assurance goals and strategies may relate to:**

- reporting procedures and protocols
- procedures for monitoring and evaluating project outcomes and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for a change of corporate focus or significant project difficulties

**Lifecycle analysis may include:**

- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Information relating to implementation of the facilities management plan may include:**

- a formal structure against which progress can be evaluated
- budgets and time-tables which enable the commitment of resources at appropriate points
- contingency plans to cater for changes or significant difficulties
- acquisition and disposal strategies
- consultation strategies to involve stakeholders
- transition plans
- specifications
- quality assurance procedures
- objectives, scope and expected benefits

**Communication channels may include:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology

**Roles and responsibilities may be influenced by:**

- job description and employment arrangements
- organisational policies relevant to work role
- team structures
- supervision and accountability requirements including OHS
- skills, training and competencies
- codes of conduct

**Feedback strategies may include:**

- formal/informal communication
- comments from management and/or colleagues
- comments from clients and legal representatives
- documentation and reports
- regular meetings

**Evaluation methods could be qualitative or quantitative and may relate to:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

## **EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining facilities and asset management requirements using industry benchmarks and risk assessment strategies
- identifying resource requirements and communicating roles and responsibilities and designing an implementation strategy for the plan
- conducting a lifecycle assessment and planning appropriate investment and disposal strategies for incorporation into facilities/asset management plan
- preparing a facilities management plan incorporating quality systems and reporting procedures
- evaluating the facilities/asset management plan and making recommendations for immediate action or modification of the plan

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- building services and operation methods and practices
- industry performance benchmarks including use and application of value analysis and benchmarking techniques
- principles and practice of performance measurement, including review and evaluation procedures, processes and techniques
- organisational quality systems such as:
  - strategic planning processes
  - recording systems
- financial analysis and forecasting principles
- long-range and annual facility planning techniques and practices
- principles and processes of objective setting
- impact analysis and scenario planning
- relevant Acts and regulations
- industry benchmarks for maintenance procedures

**Required skills and attributes include:**

- research skills to:
  - collect reliable and valid information
  - match forecasting models and techniques with specific assets/facility requirements
- leadership skills to:
  - take a leading role in a variety of situations
  - pursue new challenges and opportunities
- literacy skills to:
  - read and interpret relevant information to design facilities/asset management plan
  - prepare required documentation and information for those involved in implementation activities
- communication skills to:
  - include relevant people in the planning process
  - discuss issues that may impact on others
  - receive feedback and evaluate plan
- problem solving skills to:
  - promptly identify potential barriers to implementation of the plan and establish contingencies
- analytical skills to:
  - interpret documentation
  - analyse risk
  - estimate costings and budget needs
- interpersonal skills to:
  - review and evaluate plan
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying facilities management requirements and preparing a strategic plan to reviewing and modifying the plan
- evidence must include a strategic facilities/asset management plan that specifies specific priorities, timelines and resources, identification of roles and responsibilities regarding implementation of the plan and documentation outlining lifecycle analysis and associated budgets, review processes used to evaluate the plan and modifications made to improve plan's processes and outcomes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD603A****Manage facilities portfolio****Unit Descriptor**

This competency standard specifies the outcomes required to manage a facilities portfolio. It requires the ability to analyse risks and monitor financial resource implications. It also requires the ability to evaluate the status of the portfolio and provide recommendations.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Determine portfolio objectives and scope | <p>1.1 <i>Portfolio objectives and scope</i> are established in consultation with <i>client</i> and <i>relevant people</i></p> <p>1.2 <i>Risk assessment</i> of portfolio management requirements is conducted and assessed in accordance with industry and <i>organisational requirements</i></p> <p>1.3 Relevant <i>industry benchmarks</i> are analysed to assess expected performance of portfolio in varying market conditions</p> <p>1.4 Relevant market data is interpreted to determine trends which may affect <i>portfolio performance</i> requirements</p>  |
| 2. Develop management strategies            | <p>2.1 Portfolio reporting requirements are determined and confirmed in consultation with client</p> <p>2.2 Strategies include best-practice compliance and <i>risk management</i> measures in accordance with organisational requirements</p> <p>2.3 Strategic options are reviewed and confirmed to ensure client requirements are addressed</p> <p>2.4 Applicable industry, organisational and <i>legislative requirements</i> relevant to management of facilities portfolios are interpreted and complied with</p>  |
| 3. Implement management strategies          | <p>3.1 <i>Portfolio management plan</i> is prepared within a strategic management framework and disseminated to relevant people</p> <p>3.2 <i>Roles and responsibilities</i> associated with implementation of portfolio management plan are clearly defined and documented</p> <p>3.3 <i>Quality assurance goals</i> and strategies are established in accordance with portfolio management plan</p> <p>3.4 Monitoring and reporting arrangements for management strategies are determined in line with client requirements</p> <p>3.5 Financial, physical and human resource requirements are organised in accordance with portfolio management plan</p> |
| 4. Coordinate monitoring of portfolio       | <p>4.1 Portfolio is systematically reviewed and variations to management strategies documented for future reference and improvement processes</p> <p>4.2 Expenditure and resource usage is monitored and controlled to ensure objectives are achieved within specified parameters</p> <p>4.3 Regular reports on facilities portfolio activities are provided to relevant people to ensure compliance with portfolio management plan</p> <p>4.4 Systems, records and reporting procedures are maintained in accordance with portfolio management plan</p>   |

5. Evaluate portfolio
- 5.1 Portfolio is evaluated in consultation with relevant people using appropriate communication strategies
  - 5.2 Systematic review processes and established *evaluation methods* are used to evaluate portfolio performance
  - 5.3 Evaluation results are prepared in required format, style and structure for dissemination to relevant people
  - 5.4 Constructive feedback is reviewed and adjustments made to portfolio management plan as required
  - 5.5 Relevant documentation is securely maintained with due regard to client confidentiality, organisational and legislative requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining portfolio objectives and scope through consultative processes	3
Collecting analysing and organising information	sourcing relevant documentation and information to assess portfolio performance	3
Planning and organising activities	systematically reviewing management strategies and documenting variations	3
Working with others and in teams	collaborating with clients to determine portfolio objectives and scope	3
Using mathematical ideas and techniques	calculating resource and expenditure usage	3
Solving problems	addressing unfavourable facilities/asset conditions and performance	3
Using technology	applying project planning and statistical analysis software	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### **Portfolio may relate to:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

### **Portfolio objectives and scope may relate to:**

- market options and conditions
- current and proposed usage
- value adding
- image and presentation
- market confidence
- financial constraints
- tenancy possibilities
- return on investment
- maximum asset use
- supply and demand

### **Clients may include:**

- property owners
- property agents
- government and legal instruments/agencies
- private investors
- funds managers
- internal/external property groups
- institutions
- company management
- insurers
- risk assessors
- legal advisers

### **Relevant people may include:**

- management/colleagues
- client
- analysts
- legal representatives
- industry professionals and associations
- government personnel
- legal representatives
- taxation specialists
- accountants

**Risk assessment may include analysis of:**

- physical, financial or human resources
- competition
- market influences
- client/staff satisfaction (eg complaints)
- health and safety
- fire and security
- project control and cash flow
- suppliers and contractors
- changes to regulations and legislation
- time constraints
- emergencies and disasters

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Industry benchmarks may relate to:**

- internal rates of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flows
- lifecycle costings

**Portfolio performance may be influenced by:**

- type of facility
- change to organisational structure
- return versus risk, return on investment
- geographic aspects
- capital growth versus short-term gain
- limits to financial resources
- gearing possibilities
- cash flows
- capacity to improve asset
- taxation considerations
- demographics



**Risk management plan may describe:**

- the process which will be used to identify, analyse and manage risks both initially and throughout the life of the project
- how often risks will be reviewed, the process for review and who will be involved
- who will be responsible for which aspects of risk management
- how risk status will be reported and to whom
- the initial snapshot of the major risks, current grading
- planned strategies for reducing likelihood and seriousness of each risk (mitigation strategies) and who will be responsible for implementing them

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Portfolio management plan may include:**

- long-term financial (capital and maintenance) forecasts
- funding strategies
- performance benchmarking recommendations and measurement processes
- risk management processes
- environment plans
- lifecycle management plans
- infrastructure for and supply of utilities such as energy, water, and sewerage
- control of traffic and parking
- building and engineering maintenance, cleaning services, security services and landscape maintenance

**Roles and responsibilities  
may be influenced by:**

- job description and employment arrangements
- organisational policies relevant to work role
- team structures
- supervision and accountability requirements
- skills, training and competencies
- codes of conduct

**Quality assurance goals and  
strategies may relate to:**

- reporting procedures and protocols
- procedures for monitoring and evaluating project outcomes and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for a change of corporate focus or significant project difficulties

**Evaluation methods may be  
qualitative or quantitative  
and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining portfolio objectives and analysing relevant industry benchmarks to establish portfolio performance
- conducting a risk assessment on portfolio management requirements and preparing a risk management plan
- developing strategic management strategies which incorporate best-practice requirements
- producing a portfolio management plan that outlines monitoring and reporting arrangements according to established quality assurance goals
- determining resource requirements to support the implementation of the portfolio management plan
- undertaking strategic evaluation of portfolio and providing recommendations in a timely manner
- monitoring and controlling budgets associated with the portfolio

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry performance benchmarks including use and application of value analysis and benchmarking techniques
- principles and practice of performance measurement, including review and evaluation procedures, processes and techniques
- organisational quality systems such as:
  - strategic planning processes
  - recording systems
- financial analysis and forecasting principles
- long-range and annual planning techniques and practices
- principles and processes of objective setting
- impact analysis and scenario planning
- relevant Acts and regulations

**Required skills and attributes include:**

- research skills to:
  - collect reliable and valid information
  - match forecasting models and techniques with specific portfolio requirements
- leadership skills to:
  - take a leading role in a variety of situations
  - pursue new challenges and opportunities
- literacy skills to:
  - read and interpret relevant information
  - prepare required documentation and information for those involved in portfolio management activities
- communication skills to:
  - include relevant people in the planning process
  - discuss issues that may impact on others
  - receive feedback and evaluate plan
- problem solving skills to:
  - promptly identify potential barriers to implementation of the portfolio management plan and establish contingencies
- analytical skills to:
  - interpret documentation
  - analyse risk
  - estimate costings and budget needs
- interpersonal skills to:
  - review and evaluate portfolio management plan
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - schedule tasks and report outcomes

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from developing portfolio objectives and scope to developing and implementing management strategies, monitoring and evaluating portfolio
- evidence must include a portfolio management plan that specifies objectives and scope, identifies resources to implement the plan and documentation outlining management strategies and review processes used to evaluate the plan

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD604A****Unit Descriptor****Develop lifecycle asset management plan**

This competency standard specifies the outcomes required to develop a lifecycle asset management plan. It requires the ability to determine asset management objectives, carry out strategic analysis and formulate an asset management strategy.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Determine asset management objectives | <ul style="list-style-type: none"> <li>1.1 <i>Asset management objectives</i> are accurately assessed and clarified using appropriate <i>research and survey techniques</i> and consultative processes</li> <li>1.2 Strategic plans and other <i>information</i> is obtained and asset management issues analysed</li> <li>1.3 <i>Roles and responsibilities</i> associated with development of asset management plan are clearly defined and documented</li> <li>1.4 Monitoring and reporting arrangements for <i>asset management activities</i> are determined</li> <li>1.5 All information is reviewed to ensure accuracy and a detailed <i>budget</i> prepared</li> <li>1.6 All applicable industry, <i>organisational and legislative requirements</i> are interpreted and complied with</li> </ul> |
| 2. Conduct strategic analysis            | <ul style="list-style-type: none"> <li>2.1 Information on current and future asset requirements are accessed and evaluated in accordance with organisational policies and procedures</li> <li>2.2 Economic trends and market developments are identified and evaluated in terms of potential <i>factors that may impact on asset management objectives</i></li> <li>2.3 <i>Comparative market data</i> is obtained and analysis undertaken using standard financial <i>analysis</i> techniques</li> <li>2.4 Risk and contingencies are identified and quantified in accordance with industry standards, precedents and techniques</li> </ul>  |
| 3. Design support processes              | <ul style="list-style-type: none"> <li>3.1 <i>Key performance criteria</i> for measuring the achievement of objectives and strategies are developed and incorporated into asset management plan</li> <li>3.2 Financial, physical and human <i>resources</i> to support the asset management plan are determined and organised within budget parameters</li> <li>3.3 <i>Quality assurance goals and strategies</i> are determined in consultation with <i>relevant people</i></li> <li>3.4 Draft asset management plan and other <i>relevant documentation</i> are processed using <i>business equipment/technology</i></li> </ul>   |

4. Review and evaluate asset management plan
- 4.1 Asset management plan is reviewed and evaluated in consultation with relevant people using appropriate communication techniques
  - 4.2 Systematic review processes are established and *evaluation methods* used to assess strategic processes and outcomes
  - 4.3 Evaluation results are prepared in required format, style and structure and feedback incorporated where appropriate
  - 4.4 Recommendations for improvement of strategy are presented to relevant people within agreed timeframes

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming asset management objectives	3
Collecting analysing and organising information	gathering asset management information to determine resource requirements and assess risk	3
Planning and organising activities	conducting strategic analysis	3
Working with others and in teams	reviewing and evaluating asset management plan with relevant people	3
Using mathematical ideas and techniques	planning, measuring and scheduling tasks	3
Solving problems	identifying and addressing potential factors that may impact on asset management objectives	3
Using technology	sourcing, documenting and processing information using spreadsheets	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Assets may include:**

- property
- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- and be static or dynamic

**Asset management objectives may relate to:**

- maintenance and repair
- environmental considerations
- industry benchmarks
- maintenance of asset register
- performance measures

**Research and survey techniques may include:**

- reviewing documentation, reports, risk management plans
- analysing asset reporting systems
- surveys (organisational or industry based)
- interviews, questionnaires
- group workshops/brainstorming
- discussions with colleagues/clients

**Information may include:**

- details of maintenance schedules
- residual life of assets
- depreciation schedules
- asset registers
- total purchase and disposals for a period
- spreadsheets
- output from dedicated fixed asset software
- inventory turnover analysis

**Roles and responsibilities may be influenced by:**

- job description and employment arrangements
- organisational policy relevant to work role
- team structures
- supervision and accountability requirements including occupational health and safety (OHS)
- skills, training and competencies
- applicable codes of conduct



**Asset management activities  
may include:**

- asset strategies
- asset creation/acquisition
- information/support systems
- accounting/cost accounting
- operations
- asset maintenance
- condition and performance monitoring
- renewals
- disposals
- audit and management reviews

**Budgets may include:**

- projected expenditure by item
- projected income by source
- cash flow budgets
- budget delegations
- variation and review procedures
- security measures
- reporting mechanisms
- assets and liabilities

**Organisational  
requirements may be  
outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject property
- environmental and zoning laws affecting access and property use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Factors that may impact on asset management objectives could relate to:**

- effective life
- location in lifecycle
- when constructed/rehabilitated/replaced
- actual or estimated residual life
- previous inspection date and process
- prediction of deterioration/failure
- effect of planned maintenance
- possibility/cost/impact on level of service
- commercial or technical obsolescence

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Analysis may include:**

- examination of collected data
- formal quantitative and qualitative analysis
- explorative, descriptive, causative or predictive analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Performance criteria may relate to:**

- functionality
- emergency operation and backup
- security
- downtime
- service levels
- maintenance requirements and cost
- life span
- condition assessment
- depreciation
- cost
- replacement
- age

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Quality assurance goals and strategies may include:**

- reporting procedures and protocols
- procedures for monitoring and evaluating project outcomes and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for a change of corporate focus or significant project difficulties

**Relevant people may include:**

- management
- engineers and technicians
- technical experts
- installers
- sub-contractors
- colleagues
- clients
- site personnel
- legal representatives
- tenants
- property owners
- government personnel

**Relevant documentation may include**

- service/maintenance records
- equipment/system problems/faults
- warranty conditions and allowances
- recommendations for repairs
- operational checks and maintenance conducted
- testing and commissioning results
- parts and components replaced, materials used
- costings, receipts, invoices
- property leases, plans or contracts
- planning permits
- certifications
- inspection certificates

**Business equipment/technology may include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- establishing asset management objectives through research and consultation
- conducting a risk analysis and evaluating potential factors that may impact on asset management objectives
- preparing a detailed budget outlining resource requirements to support asset management activities
- organising processes to formulate, review and evaluate an asset management strategy

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation
- building codes and relevant Australian Standards
- building construction practice
- basic knowledge of property contracts and administrative requirements
- common hazards to public and personal safety associated with particular types of maintenance work in buildings
- relevant building service, trades and operation for maintenance operations
- industry benchmarks for maintenance procedures

**Required skills and attributes include:**

- research and evaluation skills to:
  - source asset management information and resource requirements
- organisational skills to:
  - schedule and meet timelines and client requirements
  - assess risk
  - plan management requirements and resource use
- analytical skills to:
  - interpret documentation
  - assess risk
  - estimate costings and budget needs
- communication skills to:
  - negotiate and consult with relevant people
  - interpret written and oral information
- interpersonal skills to:
  - review and evaluate strategy
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- technical skills to:
  - formulate and present an asset management plan

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining lifecycle asset management requirements to formulating and evaluating an asset lifecycle management strategy
- evidence must include relevant documentation of at least two lifecycle asset management strategies including detailed budgets, risk assessment and evaluation processes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD605A****Unit Descriptor****Determine performance of assets and facilities**

This competency standard specifies the outcomes required to monitor the ongoing performance of a facility portfolio. It requires the ability to source and analyse performance information for assessment, and provide advice and recommendations.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |   |
|---------------------------------------|---|
| 1. Identify performance requirements  | <p>1.1 <i>Performance requirements</i> are identified in consultation with <i>relevant people</i></p> <p>1.2 <i>Client needs and expectations</i> are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></p> <p>1.3 <i>Source documents</i> are obtained and analysed to ensure information is current and reliable</p> <p>1.4 Situations requiring <i>specialist advice</i> are identified and addressed</p> <p>1.5 All applicable industry, <i>organisational and legislative requirements</i> are interpreted and complied with</p>  |
| 2. Monitor performance                | <p>2.1 <i>Performance of assets and facilities</i> are regularly monitored to ensure client objectives are met</p> <p>2.2 Trends and <i>market conditions</i> are identified and evaluated against <i>industry benchmarks</i> to determine performance of assets and facilities</p> <p>2.3 <i>Assessment requirements</i> are determined and assessment processes established which accurately reflect client needs</p> <p>2.4 <i>Evaluation methods</i> for measuring performance are reliable and make efficient use of time and resources</p> <p>2.5 <i>Variations</i> between performance expectations and actual performance are promptly identified and explained to relevant people in accordance with organisational procedures</p>           |
| 3. Provide advice and recommendations | <p>3.1 Clients are provided with clear advice and <i>recommendations</i> on whether performance of facility meets their identified needs and expectations</p> <p>3.2 <i>Feedback</i> on suitability and sufficiency of advice and recommendations is obtained in accordance with organisational procedures</p> <p>3.3 Advice and recommendations are supported by verifiable evidence and are consistent with monitoring objectives and client requirements</p> <p>3.4 Advice and recommendations are presented in an appropriate format, style and structure using <i>business equipment/technology</i></p> <p>3.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</p> |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining performance expectations and providing recommendations and advice	3
Collecting analysing and organising information	sourcing information and analysing performance against industry trends	3
Planning and organising activities	organising monitoring and evaluation processes	3
Working with others and in teams	obtaining feedback on suitability of recommendations	2
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	identifying unfavourable conditions and performance	3
Using technology	researching and analysing information and presenting recommendations	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Performance requirements may relate to:

- concepts
- plans
- strategies and placement of capital in property for investment
- productive use
- customer service outcomes



**Relevant people may include:**

- management
- colleagues
- clients
- analysts
- legal representatives
- industry professionals and associations
- government personnel
- legal representatives
- taxation specialists
- accountants

**Clients may include:**

- facility owners
- facility agents
- tenants
- government and legal instruments/agencies
- investors
- funds managers
- owner occupiers
- internal/external facility groups
- institutions
- funds providers
- company management
- bankers

**Client expectations may include:**

- immediate capital gains
- long-term capital gains

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Source documents may include:**

- company property documents and registers
- lifecycle strategic asset management plans
- strategic facilities management plans
- funding strategies
- reports and inventories
- property valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- builders
- bankers and financiers
- solicitors
- business consultants
- real estate agents
- sub-contractors
- technical experts
- government officials
- industry professionals and associations
- occupational health and safety (OHS) representatives

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- privacy laws applying to owners/contractors/tenants
- local regulations and by-laws affecting subject facility
- environmental and zoning laws affecting access and facility use, and access security
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Performance of assets and facilities may be influenced by:**

- type of facility
- change to organisational structure
- return versus risk, return on investment
- geographic aspects
- capital growth versus short term gain
- limits to financial resources
- gearing possibilities
- cash flows
- capacity to improve asset
- taxation considerations
- demographics

**Asset may include:**

- property
- equipment
- land
- buildings

**Facilities may include:**

- child care centres
- recreation
- sport and recreation venues
- offices
- educational facilities
- meeting places
- car services
- security services
- community facilities

**Market conditions may include:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Assessment requirements may relate to:**

- client objectives
- horizon for investment
- cash flow
- capital growth
- depreciation
- degree of functionality
- after and pre-tax analysis
- financial feasibility
- foregone income
- sale potential
- degree of compliance with legislation
- degree of market acceptance,
- internal rate of return
- net present value
- discounted rate of return

**Evaluation methods could be qualitative or quantitative and may include:**

- use of observation/interviews
- examination of collected data
- formal quantitative and qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition
- expert and peer review
- cost data analysis

**Variations may relate to:**

- physical condition
- utilisation
- functionality
- financial performance

**Recommendations may relate to:**

- establishment of a new asset
- acquisition
- operation and maintenance
- disposal
- redevelopment
- rebuilding
- refurbishment/fit-out
- repackaging
- new finance arrangements
- new tenant/lease arrangements

**Feedback may be obtained from:**

- questionnaires
- documentation and reports
- quality assurance data
- comments from clients/colleagues
- comments from legal representatives
- regular meetings

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately determining facilities/asset performance expectations through consultation and research of relevant documentation
- monitoring asset performance using data analysis evaluation methods and identifying variations in performance expectations
- providing advice and recommendations to client using business equipment/technology and incorporating constructive feedback

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to lease arrangements, OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry practice and benchmarks
- risk management associated with facility use
- a range of research methods and analysis techniques
- investment risk factors and relationship to return expectations
- financial analysis and forecasting principles
- principles and practice of performance measurement, including evaluation processes and techniques
- industry performance benchmarks including use and application of value analysis and benchmarking techniques
- due diligence procedures
- impact of taxation on portfolio management, including asset depreciation
- economics and management of facilities and support services using a whole-of-life approach
- value identification and quality assessment
- adaptive reuse strategies and implications for business continuity

**Required skills and attributes include:**

- communication skills to:
  - clarify ideas and perspectives
  - interpret written and oral information
  - complete documentation and report findings
- research skills to:
  - collect reliable and valid information
  - source market analysis data to determine performance of specific assets/facilities
- leadership skills to:
  - take a leading role in a variety of situations
  - pursue new challenges and opportunities
- literacy skills to:
  - read and interpret relevant information to design facilities/asset management plan
  - prepare advice and recommendations
- analytical skills to:
  - analyse asset performance
  - promptly identify variances and provide recommendations for optimum performance
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining facilities/assets performance requirements to reviewing facilities/assets efficiency and providing advice and recommendations
- evidence must include documentation showing how facility/asset performance requirements were verified, a range of sourced information, use of data analysis techniques to research and analyse performance, and documented recommendation

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD606A****Unit Descriptor****Develop facilities procurement system**

This competency standard specifies the outcomes required to manage the development of a procurement system. It requires the ability to establish the strategic context in which procurement takes place and to review procurement performance to facilitate improvement.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Establish procurement context                | <p>1.1 <i>Procurement system context</i> is established and analysed in accordance with <i>organisational and legislative requirements</i></p> <p>1.2 All applicable ethical, organisational and legal requirements are interpreted and applied</p> <p>1.3 Relationship between organisation and its procurement <i>environment</i> is examined and defined</p> <p>1.4 Analysis is undertaken of organisational capability, potential future procurement interests and activities, supply markets and collaborators</p> <p>1.5 Recommendations for improvement to organisational structures and procurement systems are negotiated with <i>relevant people</i></p> <p>1.6 Supply markets are monitored to identify problems, limitations and new opportunities</p> |
| 2. Define strategic procurement directions      | <p>2.1 <i>Strategic procurement direction</i> is determined through <i>consultative processes</i> with relevant people</p> <p>2.2 Strategic procurement plan is developed to guide <i>procurement processes</i> in accordance with industry and organisational ethical standards</p> <p>2.3 Procurement plan is prepared in required format, style and structure and presented to relevant people for <i>feedback</i></p> <p>2.4 Procurement plan is reviewed to ensure opportunities and current and emerging trends are reflected</p> <p>2.5 Situations requiring <i>specialist advice</i> are identified and addressed</p>  |
| 3. Evaluate and improve procurement performance | <p>3.1 Procurement system is reviewed using established <i>evaluation methods</i> to improve procurement performance</p> <p>3.2 Evaluation methods are reliable and make efficient use of time and resources</p> <p>3.3 Measures and criteria provide sufficient information to make judgements about progress towards strategic goals and implementation of procurement processes</p> <p>3.4 <i>Strategies to improve</i> procurement performance are documented and implemented where performance fails to meet agreed criteria</p> <p>3.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</p>   |



## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting with relevant people to determine strategic directions	3
Collecting analysing and organising information	sourcing and analysing information on organisational environment and market trends	3
Planning and organising activities	managing procurement system development processes	3
Working with others and in teams	obtaining feedback on strategic procurement plan	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	undertaking risk analysis and identifying areas for improvement to procurement processes	3
Using technology	preparing recommendations and plans	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Procurement may include:

- leasing, buying
- short-term or long-term arrangements
- sole or multiple suppliers
- maintenance and support arrangements
- incentive contracting
- franchising
- research and development
- pre-qualification of suppliers
- standing orders
- standard form agreements
- common use contracts
- facilities management
- prime contractor/sub-contractor
- gainsharing/open book

**Context may include:**

- financial
- operational
- competitive
- political (public perceptions/image)
- social
- cultural
- client
- legal aspects of organisational functions

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

- Environment may relate to:**
- size, location and nature of facilities
  - property/facilities stakeholders
  - competitors
  - suppliers
  - neighbours
  - situational issues
  - environmental issues (water, noise, air)
  - financial and supply markets
  - stability of property/facilities, industry and market
  - market share
  - leasing/tenanting arrangements or prospects
  - contract/tender arrangements

- Analysis:**
- may be:
    - quantitative and/or qualitative
    - explorative, descriptive, causative or predictive
  - and may include:
    - basic statistical analysis
    - mathematical calculations
    - critical analysis
    - problem solving

- Relevant people may include:**
- management
  - governing body
  - company directors
  - technical experts
  - clients/stakeholders
  - legal representatives
  - industry professionals and associations
  - property/facilities owners/managers
  - agents
  - government personnel

- Procurement direction may be influenced by:**
- client/stakeholder needs and intentions
  - end user requirements
  - government policies
  - Australian industry involvement requirements
  - potential provider/supplier base
  - industry development requirements
  - disposal of assets

- Consultative processes may include:**
- face-to-face meetings
  - telephone, facsimile and written communication
  - email communication

- Procurement processes may include:**
- open quotations
  - tendering (both complying and non-complying)
  - advertisement
  - register of suppliers
  - direct appointments

- Feedback may include:**
- formal and informal discussions, reviews and evaluations with:
    - existing and previous clients
    - peers, colleagues and managers
  - information provided by others involved in a professional capacity both internal and external to the organisation
- Specialist advice may be sought from:**
- management
  - governing body
  - company directors
  - clients/stakeholders
  - legal, functional, technical experts
- Evaluation methods could be qualitative or quantitative and may include:**
- observation
  - questionnaires
  - review of quality assurance data
  - checklists
  - interviews
  - expert and peer review
  - cost data analysis
- Strategies for improvement may be assessed for:**
- cost effectiveness
  - ability to add value
  - ability to improve client satisfaction
  - practicality
  - viability
  - ease of implementation
  - degree of client/management support

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

- A person who demonstrates competency in this standard must be able to provide evidence of:**
- establishing strategic procurement context by analysing organisational environment and capability and supply markets, and recommending improvements to structures and systems
  - accurately interpreting and applying applicable legal, ethical and organisational requirements
  - developing a strategic procurement plan and defining the strategic procurement direction ensuring opportunities and current/emerging trends are reflected
  - reviewing procurement system against set criteria and implementing improvements to procurement processes as required

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- strategic management principles and practices
- strategic planning
- key principles of procurement, including:
  - value for money
  - open and effective competition
  - accountability and recording
  - ethics and fair dealing
  - planning and professionalism
- implications of warranties, guarantees and exclusions
- whole-of-life costing and price-quality relationship issues
- limitations of work role, responsibility and professional abilities
- relevant Acts, regulations and Australian Standards
- tendering and contracting processes, including a range of contractual arrangements
- benefits and risks of a range of procurement options such as lease purchase, sale and leaseback, and term contract
- user needs and requirements for facilities
- organisational policies and procedures for employment/tendering of services and procurement
- risk management strategies relating to managing suppliers
- best practice procurement principles

**Required skills and attributes include:**

- management skills to:
  - plan strategic procurement directions
  - achieve improved procurement system
  - make decisions about procurement processes
- evaluation skills to:
  - analyse risk
  - analyse market trends and factors
  - review procurement system
- organisational skills to:
  - manage procurement system development
  - determine appropriate timeframes
- communication skills to:
  - interpret written and oral information
  - negotiate procurement arrangements
  - obtain feedback
  - consult with clients
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from determining the strategic procurement context to defining strategic procurement directions and improving processes
- evidence must include strategic planning documentation that includes a market analysis, performance measures, evaluation of procurement processes and risk assessment

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD607A****Unit Descriptor****Determine asset regeneration options**

This competency standard specifies the outcomes required to analyse and determine regeneration options for property/assets. It requires the ability to evaluate regeneration options to make a decision on a preferred viable option and to provide advice and recommendations to clients.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                   |   |
|-----------------------------------|---|
| 1. Establish regeneration options | <p>1.1 <i>Asset regeneration</i> options are reviewed in accordance with <i>client</i> requirements</p> <p>1.2 <i>Communication strategies</i> are used to negotiate options for addressing client needs</p> <p>1.3 <i>Analysis</i> of client requirements is used to clarify project objectives and methods</p> <p>1.4 <i>Relevant information</i> and legislation are analysed to provide <i>strategic context</i> to asset regeneration objectives</p> <p>1.5 All applicable industry, <i>organisational and legislative requirements</i> are interpreted and complied with</p>  |
| 2. Analyse regeneration options   | <p>2.1 Quantitative and/or qualitative analysis is undertaken of regeneration options to assess viability and determine preferred option</p> <p>2.2 Economic trends and market developments are analysed in terms of potential implications and impact on regeneration objectives</p> <p>2.3 Impacts, <i>risks</i> and costs of regeneration options are established and analysed in accordance with project objectives</p> <p>2.4 Sound inductive reasoning is applied to ensure consistency of interpretations based on available and reliable information</p> <p>2.5 Decision on preferred regeneration option is supported by verifiable evidence</p> |
| 3. Evaluate assessment process    | <p>3.1 Strategies and processes for assessing viability of regeneration options are evaluated using established <i>evaluation methods</i></p> <p>3.2 Evaluation methods are reliable and make efficient use of time and resources</p> <p>3.3 Measures and criteria provide sufficient information to make judgements about progress towards strategic regeneration objectives</p> <p>3.4 <i>Strategies</i> to improve assessment processes are documented and implemented where performance fails to meet agreed criteria</p>   |

## PRDPOD607A Determine asset regeneration options

4. Provide advice and recommendations
- 4.1 Client is provided with advice and recommendations on preferred regeneration option within agreed timeframes
  - 4.2 Advice and recommendations are presented in appropriate format, style and structure using *business equipment/technology*
  - 4.3 *Feedback* on suitability and sufficiency of advice and recommendations is obtained from client and action taken to modify advice as required
  - 4.4 Comments, analysis and recommendations are made available for the review and reformulation of strategic goals and policies
  - 4.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

**KEY COMPETENCIES**

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming regeneration parameters, objectives and expectations	3
Collecting analysing and organising information	sourcing and accessing information and data and conducting a quantitative and/or qualitative analysis	3
Planning and organising activities	accessing relevant viability studies to undertake detailed analysis of regeneration options	3
Working with others and in teams	obtaining advice and feedback on sufficiency of advice and recommendations	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	identifying existing and/or potential risks and impacts on regeneration options	3
Using technology	researching, analysing and documenting advice and recommendations	2



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Asset may include:**

- equipment
- land
- buildings
- furniture
- vehicles
- goodwill
- business and marketing contracts

**Regeneration may relate to:**

- refitting
- renovation
- representation
- redevelopment
- rebuilding
- remodelling
- redecorating
- repackaging
- refinancing
- retenant

**Clients may include:**

- users
- asset/property owners
- asset/property agents
- government and legal instruments/agencies
- private investors
- funds managers
- owner occupiers
- internal/external property groups
- institutions
- funds providers
- company management

**Communication strategies may relate to:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology
- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Relevant information may include:**

- assessment criteria
- market research
- documented recommendations on viability of regeneration options
- certificates of occupancy
- leases
- contracts
- permits
- building codes
- licences
- specifications
- agreements
- plans

**Strategic context may relate to:**

- financial
- operational
- competitive
- political (public perceptions/image)
- social
- cultural
- client
- legal aspects of organisational functions

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards, quality assurance and certification requirements
- codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- award and enterprise agreements
- trade practices laws and guidelines
- privacy requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Risk factors which may influence regeneration may include:**

- existing asset use and ownership
- constraints on use
- government zoning and restrictions
- type and number of tenants/users
- staging of investment and/or development
- project financing
- structure of leases and/or agreements
- market influences

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Strategies for improvement may be assessed for:**

- cost effectiveness
- ability to add value
- ability to improve client satisfaction
- practicality
- viability
- ease of implementation
- degree of client/management support

**Business equipment/technology may include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may be received through:**

- comments from management and/or colleagues
- comments from client and legal representatives

## **EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- establishing regeneration options and expectations through an assessment of consultation and sourced market information and data
- accurately interpreting and applying applicable legal, ethical and organisational requirements
- using suitable analysis methods and techniques to assess regeneration options and decide on a preferred option
- testing the assessment process against assessment measures and criteria and implementing strategies to improve future processes
- providing advice and recommendations on a preferred regeneration option using client feedback within agreed timeframes

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- implications for business continuity
- strategic management principles and practices
- strategic planning
- financial analysis and modelling
- sources of industry data
- regeneration methods
- sources of industry and market information
- taxation as it applies asset regeneration
- industry benchmarks
- supply and demand economics

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - source and access information and data
- problem solving skills to:
  - anticipate factors which may affect asset regeneration
  - assess risk
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements
  - consult with industry experts and others
- technical skills to:
  - use software for planning and scheduling tasks
  - efficiently use financial and assessment software and spreadsheets
  - access market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- research skills to:
  - source, analyse and interpret asset and market information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- suitable assessment venue/equipment
- workplace documentation
- assessment materials and tools
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from establishing regeneration options and analysing viability, to reviewing the assessment process and making a decision on a preferred regeneration option
- evidence must include documentation incorporating information gathered and analysed, strategies to improve assessment processes, and formal advice and recommendations presented to client

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD608A****Unit Descriptor****Develop a property investment strategy**

This competency standard specifies the outcomes required to assess and formulate a viable property investment strategy. It requires the ability to establish investment requirements, identify market developments and trends, use standard financial analysis methods and techniques to determine investment options, and develop a risk management plan.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                      |   |
|--------------------------------------|---|
| 1. Establish investment requirements | <p>1.1 <i>Investment parameters</i>, goals and objectives are determined and confirmed in consultation with <i>relevant people</i></p> <p>1.2 Effective targets and <i>performance measures</i> are developed and are consistent with investment expectations</p> <p>1.3 <i>Relevant information</i> with regard to property and market sector characteristics is interpreted to provide strategic context to investment objectives</p> <p>1.4 Market intelligence is collected from reputable <i>sources</i> and is readily available and up-to-date</p> <p>1.5 <i>Industry benchmarks</i> are selected to ensure effective comparability and meaningful <i>analysis</i> against available data</p> <p>1.6 All applicable <i>legal</i>, ethical and <i>organisational requirements</i> are interpreted and applied</p>                           |
| 2. Undertake strategic analysis      | <p>2.1 Quantitative and/or qualitative analysis is undertaken of <i>comparative market data</i> to identify facts, issues, patterns, interrelationships and trends</p> <p>2.2 Economic trends and market developments are evaluated in terms of potential implications and impact on investment objectives</p> <p>2.3 Relevant due diligence and/or feasibility studies are accessed and considered to assist with determining potential investment viability</p> <p>2.4 Investment options are determined and tested for viability and performance against identified investment parameters</p> <p>2.5 Factors increasing or diminishing investment <i>risk</i> are identified and defined in a risk management plan</p> <p>2.6 Sound inductive reasoning is applied to ensure consistency of interpretations based on available information</p> |

3. Develop investment strategy
- 3.1 Strategy is formulated based on a comprehensive analysis of tested information and data
  - 3.2 Strategy is documented in a logical, concise and conclusive manner and presented in an appropriate format using *business equipment/technology*
  - 3.3 Recommendations are verifiable, current and sufficiently detailed and meet identified investment requirements
  - 3.4 Comments, analysis and recommendations are made available to relevant people for review and reformulation of the investment strategy
  - 3.5 Adjustments to investment strategy are determined and implemented as a result of feedback and/or changed trends and/or events
  - 3.6 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

### KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming property investment parameters, objectives and expectations	3
Collecting analysing and organising information	sourcing and accessing market information and data and conducting a quantitative and/or qualitative analysis	3
Planning and organising activities	accessing relevant due diligence and/or feasibility studies relevant to potential investment options	3
Working with others and in teams	obtaining advice and making adjustments to, or reformulating the investment strategy as required	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	identifying existing and/or potential investment risk factors and developing a risk management plan	3
Using technology	researching, analysing and documenting investment strategy	2



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Investment may relate to:**

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes

**Parameters may include:**

- class and type of property
- return versus risk
- return on investment
- geographic aspects
- demographics
- capital growth versus short term gains
- limits to financial resources
- gearing possibilities
- balancing a portfolio
- ability to control investment
- cash flows
- capacity to improve asset
- taxation considerations
- administrative talent
- market standing
- exit strategies

**Relevant people may include:**

- management
- colleagues
- clients
- interested parties
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Performance measures:**

- may include:
  - quantitative and/or qualitative assessments
- may be:
  - statistical and non-statistical
  - financial and non-financial

**Relevant information may include:**

- market intelligence from industry operators or other interested parties
- government statistics
- published analytical reports
- general knowledge of industry
- industry reports and indices
- media reports
- bank reports
- performance of comparable properties
- depreciation schedules
- current and planned property/site developments
- land title and zoning
- deposited, survey and other plans and maps
- tenancy and other contracts or leases
- permits
- building codes

**Sources on information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies index
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Analysis may include:**

- examination of collected data
- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - occupational health and safety (OHS)
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Risk may relate to:**

- competitive development
- tenancy security
- age of property
- interest rates
- technology in use
- level of regulation
- comparative risk against alternative in investments
- exit strategy, scenario analysis
- volatility of income and capital
- market and sector risks (economic cycle, fixed interest, property, stock market)
- borrowing risk/gearing
- asset allocation and investment spread
- lifestyle choices

**Business equipment/technology may include:**

- work computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- establishing investment requirements and expectations through an assessment of consultation and sourced market information and data
- accurately interpreting and applying applicable legal, ethical and organisational requirements
- using suitable analysis methods and techniques to identify and assess economic trends and market data and developments
- testing the viability and performance of potential investment options against investment parameters
- formulating a property investment strategy including identified investment options and a defined risk management plan

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- property and investment markets
- building control legislation, codes and relevant Australian Standards
- sources of industry and market information
- taxation as it applies to property development
- industry benchmarks
- supply and demand economics
- business and industry property networks
- investment risk factors and relationship to return expectations

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - source and access information and data
- problem solving skills to:
  - anticipate factors which may affect property investment
  - assess risk
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements
  - consult with industry experts and others
- technical skills to:
  - use software for planning and scheduling tasks
  - efficiently use financial and assessment software and spreadsheets
  - accessing market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- research skills to:
  - source, analyse and interpret property and market information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying investment requirements and analysing market data, to formulating and documenting an investment strategy
- evidence must include documentation of at least two studies including information gathered and analysed, identified investment options, risk management plan, and the formulated property investment strategy

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD609A****Unit Descriptor****Contract to invest in property**

This competency standard specifies the outcomes required to manage the development and performance of a property investment contract. It requires the ability to negotiate contract specifications and undertake a due diligence review against an investment feasibility study.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                      |   |
|--------------------------------------|---|
| 1. Formulate contract specifications | <ul style="list-style-type: none"> <li>1.1 <i>Investment</i> contract specifications are <i>negotiated</i> and formulated in consultation with <i>relevantpeople</i></li> <li>1.2 <i>Communication strategies</i> and processes are established and implemented to assist ongoing communication between parties to contract</li> <li>1.3 <i>Relevant information</i> and legislation are <i>analysed</i> to provide <i>strategic context</i> to investment objectives</li> <li>1.4 Instructions are issued to <i>consultants</i> to prepare draft contract</li> <li>1.5 All applicable ethical, <i>organisational and legal requirements</i> are interpreted and applied</li> </ul> |
| 2. Undertake due diligence review    | <ul style="list-style-type: none"> <li>2.1 Instructions are issued to relevant consultants to undertake <i>due diligence review</i> for assessment against feasibility study</li> <li>2.2 Impacts of due diligence review are documented and assessed against feasibility study outcomes</li> <li>2.3 Variations to feasibility study are identified and a decision made to proceed, renegotiate or withdraw as required</li> <li>2.4 Required variations to contract are negotiated and agreed between parties to reflect outcomes of due diligence process</li> </ul>   |
| 3. Develop investment contract       | <ul style="list-style-type: none"> <li>3.1 Contract is prepared in appropriate style and format ensuring compliance with contract specifications and due diligence outcomes</li> <li>3.2 Contract is reviewed to ensure accuracy of information and is disseminated to relevant people for <i>feedback</i></li> <li>3.3 Contract incorporates feedback obtained and ensures interests of client are protected</li> <li>3.4 Situations requiring <i>specialist advice</i> are identified and addressed</li> <li>3.5 Contract is finalised and settlement effected in accordance with agreed timeframes</li> </ul>  |
| 4. Evaluate investment contract      | <ul style="list-style-type: none"> <li>4.1 Contract is reviewed using established <i>evaluation methods</i> relative to contract specifications</li> <li>4.2 Evaluation methods are reliable and make efficient use of time and resources</li> <li>4.3 Conclusions are verifiable and detailed in accordance due diligence and feasibility outcomes</li> <li>4.4 Comments and recommendations are made available for review and reformulation of strategic goals and policies</li> <li>4.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</li> </ul>   |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	consulting with relevant people to formulate contract specifications	3
Collecting analysing and organising information	analysing property information and assessing feasibility study against due diligence review outcomes	3
Planning and organising activities	managing property investment contract development process	3
Working with others and in teams	obtaining feedback to ensure interests of client are protected	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	addressing variations to feasibility study and contract based on outcomes of due diligence process	3
Using technology	sourcing market data and information documenting evaluation outcomes	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

### Investment may include:

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes



**Negotiation techniques should include, but are not limited to:**

- using strategic questioning and listening to gather information and direct the focus of people involved
- use of positive, confident and cooperative language
- control of tone of voice and body language
- using language and concepts appropriate to the people involved
- using clear presentations of options and consequences
- demonstrating flexibility and willingness to negotiate
- using summarising of positions and agreements to move understanding

**Relevant people may include:**

- management
- governing body
- company directors
- consultants (legal, banking, financial architectural, engineering, surveying, environmental, valuation, planning, insurance)
- client
- industry professionals and associations
- property/facilities owners/managers
- agents
- government personnel

**Communication strategies may relate to:**

- organisational networks
- formal communication pathways
- direct line supervision paths
- lateral supervision paths
- organisational communication protocols and procedures
- clear and concise use of technical terminology
- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Relevant information may include information relating to:**

- property details
- plans, photos and other property documentation
- property investment feasibility study
- valuations
- ownership, operational and adjoining owners' agreements
- leases
- research into investment market, demographics, competition, development proposals
- legal information relating to the property (including current claims, court actions, trade mark issues, prior charges, current ownership structures)
- insurances
- technical issues (including building specifications, quantity surveyor's reports, statements of defects, building permits, structural, mechanical, electrical, hydraulic, fire services/protection, airconditioning/ventilation, refrigeration, vertical transport, asbestos)
- remedial/contamination issues
- licences
- plant and equipment
- financial, accounting and taxation records
- maintenance contracts

**Analysis:**

- may be:
  - quantitative and/or qualitative
  - explorative, descriptive, causative or predictive
- and may include:
  - basic statistical analysis
  - mathematical calculations
  - critical analysis
  - problem solving

**Strategic context may include:**

- financial
- operational
- competitive
- political (public perceptions/image)
- social
- cultural
- client
- legal aspects of organisational functions

**Consultants may be sourced from the following sectors:**

- legal
- banking
- financial
- architectural
- engineering
- surveying
- environmental
- valuation
- planning
- insurance

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Due diligence means:**

- the process by which an investor, lawyer, consistent auditor, or other qualified person, verifies the accuracy of data provided by another organisation

**Due diligence review may relate to:**

- legal searches
- property documentation (agreements, contracts, leases, valuations, authorities, plans, maintenance)
- town planning
- planning and development
- research conducted (demographics, competition)
- legal issues (current claims, court actions, trade mark issues, prior charges)
- technical issues
- financial issues (taxation, accounting)
- tenancy analysis

**Feedback may include:**

- formal and informal discussions, reviews and evaluations with:
  - existing and previous clients
  - colleagues and directors
- information provided by others involved in a professional capacity both internal and external to the organisation

**Specialist advice may be sought from:**

- management
- governing body
- company directors
- clients/stakeholders
- relevant consultants (legal, banking, financial, architectural, engineering, surveying, environmental, valuation, planning, insurance)

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- using effective communication strategies to formulate property investment contract specifications
- undertaking a due diligence review against feasibility study and negotiating required variations to study and/or contract
- accurately interpreting and applying applicable legal, ethical and organisational requirements
- preparing a property investment contract within agreed timeframes and ensuring the interests of the client are protected
- evaluating the property investment contract against contract specifications and due diligence and feasibility outcomes and documenting conclusions for future strategic goals and policies

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- strategic management principles and practices
- strategic planning
- commercial and contract law
- due diligence processes
- economics as they relate to the property industry
- limitations of work role, responsibility and professional abilities
- relevant Acts, regulations and Australian Standards
- property appraisal methods and interpretation of findings
- feasibility studies
- risk management strategies

**Required skills and attributes include:**

- management skills to:
  - plan contract development processes
  - achieve contract objectives
  - make decisions about impact of due diligence outcomes on feasibility study
- evaluation skills to:
  - analyse contract information and specifications
  - assess feasibility study outcomes
  - review contract
- organisational skills to:
  - manage consultative processes
  - determine appropriate timeframes
- communication skills to:
  - interpret written and oral information
  - negotiate contract arrangements
  - obtain feedback
  - consult with clients
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from formulating contract specifications to undertaking a due diligence review against the feasibility study and reviewing outcomes
- evidence must include contract documentation that includes a due diligence review and assessment against feasibility study, and documented evaluation outcomes

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD610A****Unit Descriptor****Plan property portfolio management**

This competency standard specifies the outcomes required to plan the management of a property portfolio. It requires the ability to provide advice and recommendations to the client based on an accurate analysis of investment performance.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |  |
|---------------------------------------|--|
| 1. Establish performance requirements | <ul style="list-style-type: none"> <li>1.1 Property <i>portfolio performance</i> requirements are determined and confirmed in consultation with the <i>client</i> and <i>relevant people</i></li> <li>1.2 <i>Client needs and expectations</i> are accurately assessed and clarified using appropriate research and survey techniques</li> <li>1.3 <i>Risk</i> assessment is conducted on portfolio management requirements</li> <li>1.4 <i>Industry benchmarks</i> are analysed to determine expected performance of portfolio in varying <i>market conditions</i></li> <li>1.5 All relevant market data is accurately interpreted to determine trends which may affect <i>performance of portfolio</i></li> <li>1.6 All applicable <i>legislative</i>, ethical and <i>organisational requirements</i> are interpreted and applied</li> </ul> |
| 2. Analyse performance constraints    | <ul style="list-style-type: none"> <li>2.1 <i>Asset lifecycle</i> is confirmed and usage parameters are determined in consultation with client</li> <li>2.2 <i>Class</i> and use of property portfolio is analysed and investment management strategies are established</li> <li>2.3 <i>Asset information</i> is analysed and specific maintenance and <i>strategic issues</i> assessed and documented</li> <li>2.4 Financial performance and retention information is analysed and special funding and budget requirements are documented</li> </ul>  |
| 3. Design portfolio management system | <ul style="list-style-type: none"> <li>3.1 Portfolio management plan is designed within a strategic management framework and disseminated to relevant people</li> <li>3.2 Portfolio management strategies are reviewed for best-practice compliance and risk management in accordance with organisational requirements</li> <li>3.3 Variations in performance expectations are promptly identified and explained to relevant people</li> </ul>   |
| 4. Implement and review the system    | <ul style="list-style-type: none"> <li>4.1 Portfolio is systematically <i>evaluated</i> and variations to the management system are identified and appropriate changes made</li> <li>4.2 Measures and criteria are chosen that provide sufficient information to make judgements about progress towards client objectives</li> <li>4.3 Strategies to improve portfolio management system are documented and implemented where performance fails to meet agreed criteria</li> <li>4.4 Regular <i>reports</i> on property portfolio management activities are provided to relevant people</li> <li>4.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements</li> </ul>  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining performance expectations and providing recommendations and advice	3
Collecting analysing and organising information	sourcing property data and analysing performance against industry trends	3
Planning and organising activities	coordinating, monitoring and evaluating assessment processes	3
Working with others and in teams	obtaining feedback on suitability of advice and recommendations	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	promptly addressing variations in performance expectations	3
Using technology	researching and analysing information, and preparing and presenting reports	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Portfolio performance may relate to:**

- concepts
- plans
- strategies and placement of capital in property for investment
- productive use
- customer service outcomes



**Clients may include:**

- financial institutions
- investment organisations
- funds managers
- internal/external property groups
- partners
- joint ventures
- unit trustees
- owner occupiers
- developers

**Relevant people may include:**

- supervisors
- management
- colleagues
- clients
- analysts
- legal representatives
- industry professionals and associations
- government personnel
- legal representatives
- taxation specialists
- accountants

**Client needs and expectations may relate to:**

- immediate capital gains
- long-term capital gains

**Risk may relate to:**

- risk factors and return expectations
- market and sector risks (economic cycle, fixed interest, stock market)
- economic trends
- borrowing risk/gearing
- volatility of income and capital
- access restrictions on property
- specific property risk

**Industry benchmarks may include:**

- internal rate of return
- industry association performance index
- published vacancies factors
- employment rates
- tenancy mix
- inflation rate
- discounted cash flow
- lifecycle costing

**Market conditions may be influenced by:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Performance of portfolio may be influenced by:**

- type of property/facility
- change to organisational structure
- return versus risk, return on investment
- geographic aspects
- capital growth versus short term gain
- limits to financial resources
- gearing possibilities
- cash flows
- capacity to improve asset
- taxation considerations
- demographics

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - occupational health and safety (OHS)
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- tenancy agreements
- home building requirements

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- emergency and evacuation procedures
- records and information systems and processes
- employer and employee rights and responsibilities
- policies and procedures relating to own role and responsibility
- ethical standards, codes of practice
- OHS policies, procedures and programs
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- complaints and dispute resolution procedures
- quality and continuous improvement processes and standards

**Asset lifecycle is:**

- planning for, and establishment of, a new asset
- acquisition
- operation and maintenance
- disposal

**Class of assets in portfolio may include but are not limited to:**

- land
- land and improvements
- infrastructure
- plant and equipment

**Asset information may be contained within:**

- government statistics
- reports and inventories
- business plans
- marketing plans
- property valuation statements
- depreciation schedules
- qualitative and/or quantitative data
- comparative market data
- financial documents
- taxation records

**Strategic issues may relate to:**

- portfolio balance
- changes in return on investment expectations
- the environment
- political considerations

**Evaluation methods could be qualitative or quantitative and may include:**

- observation
- questionnaires
- review of quality assurance data
- checklists
- interviews
- expert and peer review
- cost data analysis

**Reports may be:**

- accounting
- financial
- advisory

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining client performance expectations through consultation and conducting research of relevant documentation and legislation
- conducting analysis of portfolio performance requirements against sourced market information and industry benchmarks
- assessing risk and identifying portfolio performance constraints through analysis of asset lifecycle, class and use
- designing and documenting strategic plans for the review of the portfolio management system
- preparing plans and reports on portfolio management and suggesting improvements through systematic review of portfolio management against set criteria

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to lease arrangements, OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- organisational and professional procedures, ethical practices and business standards
- industry practice and benchmarks
- risk management associated with property portfolio management
- contracts law and property performance
- administration of property/facility usage plans
- lease rights and responsibilities
- cost-in-use issues such as occupancy costs, service charges and maintenance costs
- lifecycle costing
- local property market conditions and overall trends in the industry
- a range of research methods and analysis techniques

**Required skills and attributes include:**

- communication skills to:
  - interpret written and oral information
  - interpret property portfolio plans
  - negotiate leases, purchases and rent reviews
- technical skills to:
  - develop reports
- analytical skills to:
  - interpret financial data
  - assess property performance
  - research property/facility application and usage and benchmark for optimisation
- research skills to:
  - source, analyse and interpret property investment documentation
  - identify relevant sources of information
- organisational skills to:
  - implement and review the portfolio management system
  - develop and complete strategies within established timeframes
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from establishing portfolio performance requirements to designing and implementing and reviewing a portfolio management system
- evidence must include copies of documentation showing how portfolio requirements were verified, a range of sourced information, use of data analysis techniques to research and analyse portfolio performance and asset lifecycle, evaluation measures used to determine success of portfolio management system and reports provided on portfolio management activities.

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD611A****Unit Descriptor****Manage performance of property investment**

This competency standard specifies the outcomes required to manage the performance of a property investment. It requires the ability to source and analyse market information and data, assess industry trends and develop performance criteria to accurately measure and monitor performance of property investments.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Establish performance requirements        | <p>1.1 <i>Property investment</i> requirements are determined and confirmed in consultation with <i>clients</i> and <i>relevant people</i></p> <p>1.2 <i>Client needs and expectations</i> are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></p> <p>1.3 Relevant <i>information</i> and <i>legislation</i> is assessed to ensure investment options comply with investment requirements</p> <p>1.4 Methods for gathering information are reliable and make efficient use of time and resources</p> <p>1.5 All applicable legislative, ethical and <i>organisational requirements</i> are interpreted and applied</p> |
| 2. Develop performance management strategies | <p>2.1 Performance management strategy is formulated based on <i>analysis</i> of investment requirements against <i>market conditions</i></p> <p>2.2 <i>Performance criteria</i> is determined and tested to ensure it is logical, clear, concise and capable of implementation</p> <p>2.3 Factors increasing or diminishing investment <i>risk</i> are identified, analysed and discussed with client</p> <p>2.4 <i>Quality assurance goals and strategies</i> are established in consultation with relevant people</p> <p>2.5 Performance strategy is documented and communicated to relevant people involved in implementation</p>   |
| 3. Manage implementation of strategies       | <p>3.1 Monitoring and reporting arrangements for implementation of performance management strategies is effectively communicated</p> <p>3.2 <i>Targets and milestones</i> are identified and linked to performance criteria to ensure achievement of investment requirements</p> <p>3.3 <i>Documentation</i> and checklists associated with implementation of performance management strategies are prepared and distributed to relevant people</p> <p>3.4 <i>Resource</i> requirements are identified and organised in accordance with organisational requirements</p>   |

4. Evaluate performance of property investment
- 4.1 Property investment strengths and weaknesses are analysed and measured against property trends and *market parameters* to determine future recommendations
  - 4.2 Reliable and valid data analysis methods are applied to identify facts, issues, patterns, interrelationships and trends
  - 4.3 Trends are accurately assessed to provide meaningful information on performance of property investment
  - 4.4 Factors increasing or diminishing investment risk are identified, analysed and discussed with client
  - 4.5 Sound inductive reasoning is applied to ensure consistency of interpretations based on available information
  - 4.6 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	determining and confirming performance requirements of property investments	3
Collecting analysing and organising information	sourcing property market information and conducting analysis to identify and assess industry trends	3
Planning and organising activities	sourcing and accessing comparative data for analysis	3
Working with others and in teams	obtaining advice and making adjustments to, or reformulating, investment performance strategies	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	identifying risk factors and unfavourable investment conditions	3
Using technology	researching and analysing property investment information and preparing and presenting performance results	2



## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property investment may include:**

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes

**Clients may be:**

- principals (both small and large)
- partners
- joint ventures
- unit trustees
- owner occupiers
- internal departments
- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups
- developers

**Relevant people may include:**

- management
- colleagues
- clients
- analysts
- site personnel
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Client needs and expectations may relate to:**

- immediate capital gains
- long-term capital gains

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Information may include:**

- market intelligence from industry operators or other interested parties
- government statistics
- published analytical reports
- general knowledge of industry
- industry reports and indices
- media reports
- bank reports
- cultural variations

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - occupational health and safety (OHS)
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Analysis may include:**

- examination of collected data
- formal quantitative and/or qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Market conditions may be influenced by:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Performance criteria**

- may include:
  - quantitative and/or qualitative assessments
- may be:
  - statistical and non-statistical
  - financial and non-financial

**Risk may relate to:**

- competitive development
- tenancy security
- age of property
- interest rates
- technology in use
- level of regulation
- comparative risk against alternative in investments
- exit strategy, scenario analysis
- volatility of income and capital
- market and sector risks (economic cycle, fixed interest, property, stock market)
- borrowing risk/gearing
- asset allocation and investment spread
- lifestyle choices

**Quality assurance goals and strategies may include:**

- reporting procedures and protocols
- procedures for monitoring and evaluating project outcomes and client satisfaction
- compliance with Australian Standards
- continuous improvement strategies
- reducing risk by anticipating, evaluating and developing strategies for the management of possible problems
- a formal structure against which progress can be evaluated
- mechanisms for involving a wide variety of interested parties or stakeholders in the project
- budgets and time-tables which enable the commitment of resources at appropriate points in the project
- contingency plans to cater for a change of corporate focus or significant difficulties

**Targets and milestones may include:**

- agreed reporting requirements
- measurement/achievement of set outcomes
- completion of key tasks
- asset lifecycle reporting

**Documentation may include information relating to:**

- budgets and operating costs
- sub-plans (environment, human resource management, marketing)
- policy/management procedures
- legal documentation
- property leases, plans or contracts
- service/maintenance records

**Resources may include:**

- tools and equipment
- materials
- personnel
- training
- transport

**Market parameters may relate to:**

- class and type of property
- return versus risk
- return on investment
- geographic aspects
- demographics
- capital growth versus short term gains
- limits to the financial resources
- gearing possibilities
- balancing a portfolio
- ability to control investment
- cash flows
- capacity to improve asset
- taxation considerations
- administrative talent
- market standing
- exit strategies

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- accurately analysing property investment information and identifying property trends and risk factors
- establishing performance criteria to assess property investment performance through an assessment of sourced market information and data
- accurately interpreting and applying applicable legal, ethical and organisational requirements
- using suitable analysis methods and techniques to identify and assess economic trends and market data and developments
- testing the performance of property investments against market parameters
- arranging required resources to support the implementation of performance measurement strategies

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- local property market conditions and overall trends in the industry
- concepts and strategies for placement of capital in property for investment
- industry benchmarks
- a range of research methods and analysis techniques
- current property and investment market
- taxation as it applies to property development
- budgeting methods/techniques
- economics as it applies to property development

**Required skills and attributes include:**

- technology skills to:
  - use financial and assessment software and spreadsheets
- organisational skills to:
  - maintain records and databases
  - organise and prepare property investment information
  - build models for property investment
- problem solving skills to:
  - determine factors which may affect property markets
- analytical skills to:
  - apply basic statistical methods and techniques
- research skills to:
  - source, analyse and interpret property and market information
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - deal with property investment stakeholders

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from establishing property investment performance requirements, determining performance measurement criteria, managing implementation of performance strategies to evaluating performance of property investment
- evidence must include documented property investment performance strategies and implementation plan outlining resources and monitoring and reporting requirements, documentation showing analysis of performance criteria against market and industry data

**Integrated competency  
assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function

**PRDPOD612A****Unit Descriptor****Negotiate partnership arrangements**

This competency standard specifies the outcomes required to establish a formal partnership for property investment. It requires the ability to research and select a preferred partner and negotiate and formalise a partnership strategy for investment in property.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                       |   |
|---------------------------------------|---|
| 1. Determine investment requirements  | <p>1.1 <i>Property investment</i> requirements are determined in consultation with <i>relevant people</i></p> <p>1.2 <i>Client</i> needs are accurately assessed and clarified using appropriate research and survey techniques and <i>consultative processes</i></p> <p>1.3 Relevant <i>documentation</i> and <i>legislation</i> is assessed to ensure investment options comply with investment requirements</p> <p>1.4 Methods for gathering information are reliable and make efficient use of time and <i>resources</i></p> <p>1.5 All applicable legislative, ethical and <i>organisational requirements</i> are interpreted and applied</p>      |
| 2. Research partnership opportunities | <p>2.1 Desired investment partnership arrangements are determined in consultation with client and relevant people</p> <p>2.2 Criteria for potential partners is established in line with investment, client and organisational requirements</p> <p>2.3 Potential listing of <i>partners</i> is established and confirmed with client in accordance with organisational procedures</p> <p>2.4 Identified partner preferences, needs and expectations are clarified and addressed using appropriate <i>communication techniques</i></p> <p>2.5 Preferred partner is selected based on assessment against specified criteria in accordance with client</p> |
| 3. Develop negotiation strategy       | <p>3.1 Strategy is developed for <i>negotiation</i> of partnership offer in accordance with client preferences, needs and expectations</p> <p>3.2 Strategy includes details of timetables, budget and negotiation parameters</p> <p>3.3 Negotiation strategy supports establishment of workable partnership relationships</p> <p>3.4 <i>Potential areas of conflict</i> are identified and strategies developed to manage, resolve and facilitate partnership arrangement</p> <p>3.5 Situations requiring <i>specialist advice</i> are identified and addressed</p>   |



4. Negotiate partnerships
- 4.1 Negotiations are conducted in a professional manner and maintain a focus on client interests and agreed negotiation strategy
  - 4.2 Problems are identified, analysed and addressed with minimal disruption to achievement of client objectives
  - 4.3 Communication styles and methods are adapted to meet preferred individual negotiation style
  - 4.4 All interaction reflects sensitivity to individual *social and cultural differences*
  - 4.5 Appropriate facilitation skills are used to promote a professional environment that supports and promotes participation throughout negotiations
5. Establish partnership arrangements
- 5.1 Partnership arrangements are established and confirmed in accordance with client requirements
  - 5.2 Financial arrangements are finalised in accordance with negotiated terms and conditions
  - 5.3 Formal documentation is prepared using *business equipment/technology* and formalised reflecting agreed arrangements
  - 5.4 Client is advised of formal partnership arrangements and *feedback* received on process and outcomes
  - 5.5 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	conducting partnership negotiations and formalising arrangements	3
Collecting analysing and organising information	sourcing investment documentation and appropriate potential partners	3
Planning and organising activities	scheduling and conducting negotiations in accordance with negotiation strategy	3
Working with others and in teams	obtaining and using feedback on effectiveness of formal partnership arrangements	3
Using mathematical ideas and techniques	formulating and including details of timetables and budgetary parameters in negotiation strategy	3
Solving problems	planning for anticipated problems or potential areas of conflict	3
Using technology	sourcing information and preparing formal documentation	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Property investment may include:**

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes

**Relevant people may include:**

- management/colleagues
- clients
- analysts
- site personnel
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Clients may include:**

- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups
- partners
- joint ventures
- unit trustees
- owner occupiers
- developers

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Documentation may include information relating to:**

- budgets and other financial reports
- market intelligence
- government statistics
- published analytical reports
- general knowledge of industry
- industry reports and indices
- media reports
- bank reports
- cultural variations
- contracts and other legal papers

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation and regulations which affect organisational operation including:
  - occupational health and safety (OHS)
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- relevant common law
- trade practices laws and guidelines
- consumer protection law and guidelines
- Australian Standards
- quality assurance and certification requirements
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- privacy/confidentiality requirements and laws applying to owners/contractors/tenants
- relevant local government policies and regulations
- environmental and zoning laws affecting access and property use, and access security
- public health
- freedom of information
- court/tribunal precedents
- licensing requirements
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, Foreign Investment Review Board requirements
- Commonwealth and State taxation requirements
- strata, community and company titles
- tenancy agreements
- home building requirements

**Resources may relate to:**

- tools and equipment
- materials
- personnel
- training
- transport

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- OHS policies, procedures and programs
- quality and continuous improvement processes and standards

**Partners may include:**

- banks
- other financial institutions
- other investors
- corporations
- government instrumentalities
- private individuals
- builders
- developers
- tenants

**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Assessment may include:**

- verification of financial credentials
- establishing bona fides

**Negotiation techniques should include, but are not limited to:**

- using strategic questioning and listening to gather information and direct the focus of people involved
- use of positive, confident and cooperative language
- control of tone of voice and body language
- using language and concepts appropriate to the people involved
- using clear presentations of options and consequences
- demonstrating flexibility and willingness to negotiate
- using summarising of positions and agreements to move understanding

**Conflict situations may include:**

- arguments and disagreements
- persons with criminal intent
- persons under the influence of intoxicating substances
- refusals to follow directions and guidance
- conflicts between members of the public
- ejection of persons
- accidents resulting in injury
- riots, demonstrations
- destruction of property
- persons suffering from emotional distress or mental illness
- situations affecting the security of self, others or property

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- investment consultants
- bankers and financiers
- solicitors
- real estate agents
- analysts
- government officials
- industry professionals and associations

**Social and cultural differences may be expressed in:**

- language (verbal, non-verbal, written)
- traditional practices and observations
- beliefs, values, practices
- food, diet
- dress
- religious and spiritual observances
- social conventions
- cultural stereotypes
- conventions of gender/sexuality

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications such as databases, word applications
- scanners

**Feedback may be sought from:**

- formal/informal performance appraisals
- comments from supervisors and/or colleagues
- comments from client and legal representatives
- personal, reflective behaviour strategies
- workplace assessment

## EVIDENCE GUIDE

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- determining investment requirements and objectives through effective consultative processes and identifying required legislative compliance
- identifying and selecting potential partnership arrangements using criteria developed for assessment and selection
- developing a negotiation strategy which includes timetables, budget and negotiation parameters and addresses potential areas of conflict
- conducting negotiations using effective communication and facilitation methods
- formalising and documenting partnership arrangements showing evidence of agreement by all parties to the arrangement

**Required knowledge and understanding includes but is not limited to:**

- relevant legislation that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination
- ethical practices and relevant Codes of Conduct
- local property market conditions and overall trends in the industry
- concepts and strategies for placement of capital in property for investment
- industry benchmarks
- a range of research methods and analysis techniques
- sources of funding
- legal processes
- investment risk factors and relationship to return expectations
- current property and investment markets
- negotiation strategies
- taxation as it applies to property development
- budgeting

**Required skills and attributes include:**

- technology skills to:
  - use financial and assessment software and spreadsheets
  - develop and present information
- organisational skills to:
  - coordinate assessment and selection process
  - conduct negotiation process
  - develop and complete strategies within established timeframes
- negotiation skills to:
  - direct focus of people involved in negotiation
  - negotiate agreement of all parties
  - resolve conflict and problems during negotiation
- analytical skills to:
  - identify potential areas of conflict
  - identify and assess potential partners
- research skills to:
  - source, analyse and interpret property investment documentation
  - identify relevant sources of information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
  - adjust communication style to suit negotiations

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from developing a negotiation strategy, to conducting negotiations with potential partners and formalising partnership arrangements
- evidence must include documentation showing how client needs were verified, strategies developed for negotiation and assessment of potential partners, and formalised partnership arrangement

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



**PRDPOD613A****Unit Descriptor****Conduct a property investment feasibility study**

This competency standard specifies the outcomes required to conduct an assessment of investment feasibility. It requires the ability to identify objectives and techniques to undertake the study, use valid and reliable research techniques to analyse information and report study findings and conclusions.

**Unit Sector**

Property operations and development

**ELEMENT****PERFORMANCE CRITERIA**

- |                                 |  |
|---------------------------------|--|
| 1. Establish study requirements | <p>1.1 Aims and objectives of <i>investment</i> feasibility study are clearly established in accordance with <i>client</i> and <i>organisational requirements</i></p> <p>1.2 Study objectives and timelines are negotiated and agreed in consultation with <i>relevant people</i></p> <p>1.3 <i>Relevant documentation</i> and <i>legislative requirements</i> are gathered and reviewed to identify critical requirements of the study</p> <p>1.4 Initial comparisons with similar properties are made to allow effective comparability against <i>client expectations</i> in accordance with organisational requirements</p> <p>1.5 Situations requiring <i>specialist advice</i> are identified and support sought as required in accordance with organisational requirements</p> |
| 2. Access relevant information  | <p>2.1 Relevant <i>information</i> is gathered and organised in a format suitable for <i>analysis</i> and interpretation</p> <p>2.2 Market information is accessed and evaluated in terms of validity, reliability and relevance in accordance with identified analysis requirements</p> <p>2.3 Relevant people are consulted to gather additional information using appropriate <i>communication techniques</i></p> <p>2.4 Environment is scanned to identify and assess factors that may impact on study in accordance with organisational requirements</p> <p>2.5 Methods for gathering information are reliable and make efficient use of time and resources in accordance with organisational requirements</p>  |
| 3. Analyse information          | <p>3.1 Quantitative and/or qualitative analysis is undertaken of <i>comparative market data</i> using standard financial analysis techniques</p> <p>3.2 Economic trends and market developments are identified and evaluated in terms of potential implications and impact on study objectives</p> <p>3.3 <i>Factors</i> increasing or diminishing investment <i>risk</i> are identified, analysed and discussed with client</p> <p>3.4 Sound inductive reasoning is applied to ensure consistency of interpretations based on available information</p>   |

- |                                   |   |
|-----------------------------------|---|
| 4. Formulate investment scenarios | 4.1 Alternative investment scenarios are developed to meet study requirements and criteria in accordance with organisational requirements<br>4.2 <i>Consultative processes</i> are used to obtain views of industry experts as required<br>4.3 Scenarios are verified against prescribed criteria and analysed to minimise subjective assessment<br>4.4 Sensitivity analysis is performed on data to identify degree of convergence within identified industry and market <i>benchmarks</i><br>4.5 Property trends and <i>market conditions</i> are identified and evaluated against study requirements |
| 5. Document feasibility study     | 5.1 Feasibility study is presented in appropriate format, style and structure using suitable <i>business equipment/technology</i><br>5.2 Report is prepared and distributed to relevant people within agreed timeframes in accordance with organisational requirements<br>5.3 Conclusions are verifiable, current and sufficiently detailed to meet identified client and organisational requirements<br>5.4 All information is securely maintained with due regard to client confidentiality, legislative and organisational requirements  |

## KEY COMPETENCIES

The seven key competencies represent generic skills considered essential for effective work participation. The bracketed numbering against each of the key competencies indicates the performance level required in this unit.

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

Key Competencies or Generic Skills relevant to this unit include:

Key Competency	Example of Application	Performance Level
Communicating ideas and information	clarifying and confirming client objectives, needs and expectations and consulting on environmental impact and investment scenarios	3
Collecting analysing and organising information	sourcing and analysing relevant information and market data and assessing scenarios against criteria	3
Planning and organising activities	managing feasibility study processes and accessing comparative data for analysis	3
Working with others and in teams	consulting with interested parties to obtain advice and receive feedback	3
Using mathematical ideas and techniques	applying statistical and probability calculations	3
Solving problems	undertaking further assessment to ensure consistency of conclusions	3
Using technology	researching, analysing and documenting study	2

## RANGE STATEMENT

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the performance criteria.

**Investment may relate to:**

- concepts, plans, strategies and placement of capital in property for investment, productive use and customer service outcomes

**Clients may include:**

- individuals
- financial institutions
- investment organisations
- funds managers
- internal/external property groups

**Organisational requirements may be outlined and reflected in:**

- quality assurance and/or procedures manuals
- goals, objectives, plans, systems and processes
- business and performance plans
- mission statements, strategic plans
- policies and procedures in relation to client service
- legal and organisational policy/guidelines
- access and equity principles and practice guidelines
- ethical standards, codes of practice
- complaints and dispute resolution procedures
- occupational health and safety (OHS) policies, procedures and programs
- quality and continuous improvement processes and standards

**Relevant people may include:**

- management/colleagues
- client
- interested parties
- legal representatives
- industry professionals and associations
- agents
- government personnel
- legal representatives
- taxation specialists
- accountants

**Relevant documentation may relate to:**

- performance of comparable properties
- leasing rates
- depreciation schedules
- policy/management procedures
- current and planned property/site developments
- sales information
- marketing services
- land title and zoning
- legal status
- deposited, survey and other plans and maps
- tenancy and other contracts or leases
- permits
- building codes
- rates notices
- taxation papers

**Legislative requirements may be outlined and reflected in:**

- relevant Commonwealth/State/Territory legislation which affect organisational operation:
  - OHS
  - environmental issues
  - equal employment opportunity (EEO)
  - industrial relations
  - anti-discrimination and diversity
- Australian Standards
- relevant industry codes of practice which may cover areas including: the market sector, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas, electricity), contract or common law
- trade practices laws and guidelines
- privacy requirements
- general duty of care to clients
- strata, community and company titles
- tenancy agreements
- home building requirements

**Client expectations may relate to:**

- immediate capital gains
- long-term capital gains

**Specialist advice may be sought from:**

- valuers
- architects
- planners
- land economists
- developers
- taxation and accounting practitioners
- bankers and financiers
- solicitors
- industry professionals and associations
- investment consultants
- real estate agents

**Sources of information may include:**

- published industry data
- trade journals
- third parties
- information services
- consultants
- press clippings
- industry indexes
- industry/organisational databases

**Analysis may include:**

- examination of collected data
- formal quantitative and qualitative analysis
- examination of cash flows and other financial projections
- probability analysis
- computer modelling
- time series recognition

**Communication techniques may include:**

- verbal or non-verbal language
- two-way interaction
- active listening
- questioning to clarify and confirm understanding
- accurately interpreting non-verbal and verbal messages
- use of language and concepts appropriate to cultural differences
- clear and concrete presentations of options
- culturally inclusive and sensitive engagement techniques
- consultation methods
- seeking feedback

**Comparative market data may include:**

- best practice information
- international benchmarking
- national benchmarking
- inter-organisation comparison data

**Factors which may influence the complexity of the feasibility study may include:**

- existing land use and ownership
- constraints on use
- government zoning and restrictions
- type and number of tenants
- staging of investment and/or development
- project financing
- structure of leases

**Risk may relate to:**

- risk factors and return expectations of the client
- organisational risk
- volatility of income and capital
- market and sector risks (economic cycle, fixed interest, property, stock market)
- economics
- borrowing risk/gearing
- asset allocation and investment spread
- lifestyle choices

**Consultative processes may include:**

- face-to-face meetings
- telephone, facsimile and written communication
- email communication

**Benchmarks may include:**

- industry published building occupation data
- business strategy parameters
- market expectations
- financial constraints
- historical operational costs
- statutory costs
- building operational costs
- research data
- economic parameters

**Market conditions may relate to:**

- level of competition
- availability of alternatives
- economic conditions
- business confidence

**Business equipment/technology may include:**

- computers
- email
- internet/extranet/intranet
- facsimile machines
- printers
- photocopiers
- data storage devices
- software applications
- scanners

**EVIDENCE GUIDE**

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

**A person who demonstrates competency in this standard must be able to provide evidence of:**

- sourcing documentation and information through consultation to establish study aims and objectives, and make initial comparisons of similar properties
- sourcing market and environmental information to identify factors impacting on study
- accurately analysing market information to identify economic trends and market developments, and risk factors
- formulating investment scenarios against industry benchmarks
- documenting and presenting investment feasibility study using appropriate business equipment/technology

**Required knowledge and understanding includes but is not limited to:**

- organisational and professional procedures, ethical practices and business standards
- OHS issues and requirements
- EEO, equity and diversity principles
- limitations of work role, responsibility and professional abilities
- relevant Acts and regulations
- building control legislation, codes and relevant Australian Standards
- sources of industry and market information
- current property and investment market
- types of property markets
- alternative property uses
- business and industry property networks
- value management
- project assessment methods
- investment risk factors and relationship to return expectations

**Required skills and attributes include:**

- organisational skills to:
  - plan and schedule timelines and objectives
  - manage project processes
- problem solving skills to:
  - determine factors which may affect property markets
  - evaluate risk
- communication skills to:
  - interpret written and oral information
  - negotiate client requirements
  - consult with industry experts and other relevant people
- technical skills to:
  - use software for planning and scheduling tasks
  - use financial and assessment software and spreadsheets
  - access market information
- interpersonal skills to:
  - relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- research skills to:
  - source, analyse and interpret property and market information

**Resource implications for assessment include:**

- a registered provider of assessment services
- competency standards
- assessment materials and tools
- suitable assessment venue/equipment
- workplace documentation
- candidate special requirements
- cost/time considerations

**Validity and sufficiency of evidence requires:**

- competency will need to be demonstrated over a period of time reflecting the scope of the role
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the ability of the person to assess competence
- all assessment which is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through a simulated project based activity and must include evidence relating to each of the elements in this unit, covering all activities from identifying study requirements and assessing environmental impact, to formulating investment scenarios and documenting the completed study
- evidence must include documentation of at least two studies including information gathered and analysed, identified environmental impact and investment scenarios formulated, and the documented investment feasibility scenario

**Integrated competency assessment:**

This competency standard could be assessed on its own or as part of an integrated assessment activity involving other relevant competencies relevant to the job function



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

## 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

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

**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<br>1.2 Client entitlements and responsibilities are explained where necessary<br>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<br>2.2 Information need is assessed and accurate verbal or written information is clearly supplied<br>2.3 As necessary, interview appointment time is arranged, preparatory information is provided and interview preparations are completed<br>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<br>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**

<b>Type of client enquiry/need</b>	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.
<b>Research</b>	includes information on agency database and printed information held by industry and community groups.
<b>Communication of need</b>	may be by e-mail or other electronic method, by memo, or verbal.
<b>Relevant bookings</b>	include appointments for visits, meetings, travel, inspections or listings.
<b>Files</b>	could be electronically or manually maintained.

**EVIDENCE GUIDE**

<b>Context of assessment</b>	<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>
<b>Scope of application</b>	This unit is relevant across all areas of real estate agency service.
<b>Required workplace performance</b>	The work will involve some initiative within broad parameters established by agency and property marketing strategies.
<b>Resources required for assessment include:</b>	<ul style="list-style-type: none"> <li>• assessment instruments</li> <li>• multimedia equipment</li> <li>• relevant forms/documents for recording queries</li> <li>• agency case studies</li> <li>• suitable venue</li> </ul>
<b>Underpinning knowledge</b>	<ul style="list-style-type: none"> <li>• Agency operations and processes</li> <li>• Work allocation procedures</li> <li>• Sources of information/researched data</li> <li>• Information management systems for communicating effectively and accurately with clients</li> </ul>

## **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

**BSBCMN307A****Unit Descriptor****Maintain business resources**

This unit covers the skills and knowledge required to determine, administer and maintain resources and equipment to complete a variety of tasks.

This unit is related to BSBCMN205A Use business technology, BSBCMN406A Maintain business technology and BSBCMN407A Coordinate business resources.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Advise on resource requirements                  | <ul style="list-style-type: none"> <li>1.1 Estimates of future and present <i>business resources</i> are calculated in accordance with <i>organisational requirements</i></li> <li>1.2 Advice is clear, concise and relevant to achievement of organisational requirements</li> <li>1.3 Information is provided on the most economical and effective choice of equipment, materials and suppliers</li> <li>1.4 Resource shortages and possible impact on operations are identified</li> </ul>   |
| 2. Monitor equipment/resource usage and maintenance | <ul style="list-style-type: none"> <li>2.1 Resource handling is in accordance with established organisational requirements including <i>Occupational Health and Safety requirements</i></li> <li>2.2 <i>Business technology</i> is used to monitor and identify the effective use of equipment and resources</li> <li>2.3 Consultation with individuals and teams is used to facilitate effective decision making on the appropriate allocation of resources</li> <li>2.4 Relevant <i>policies regarding resource use</i> are identified and adhered to in the performance of operational tasks</li> <li>2.5 Resource usage is routinely monitored and compared with estimate requirements in budget plans</li> </ul> |
| 3. Acquire resources                                | <ul style="list-style-type: none"> <li>3.1 Acquisition and storage of resources is in accordance with organisational requirements</li> <li>3.2 Acquisition of resources is cost effective and consistent with organisational timelines</li> <li>3.3 Resources are acquired within available timelines to meet identified requirements</li> <li>3.4 <i>Resource acquisition processes</i> are reviewed to identify improvements in future resource acquisitions</li> </ul>   |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	1
Collecting analysing and organising information	to identify resource needs	2
Planning and organising activities	for self	2
Working with others and in teams	in completing scheduled tasks	1
Using mathematical ideas and techniques	as an aid to measure and schedule tasks	1
Solving problems	to identify equipment faults	2
Using technology	to complete allocated tasks	1

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace including:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Business resources may include:

- facilities
- software
- raw materials
- human resources
- stock and supplies



**Organisational requirements may be included in:**

- quality assurances and/or procedures manuals
- goals, objectives, plans, systems and processes
- legal and organisational policy/guidelines and requirements
- business and performance plans
- security and confidentiality requirements
- management and accountability channels
- access and equity principles and practice
- ethical standards
- Occupational Health and Safety policies, procedures and programs
- quality and continuous improvement processes and standards
- defined resource parameters
- manufacturer's and operational specifications

**Occupational Health and Safety requirements may include:**

- reporting requirements
- site access
- equipment use
- first-aid kit
- decision making delegations
- medical attention

**Business technology may include:**

- computers
- computer applications
- modems
- personal schedules
- email
- internet/extranet/intranet
- photocopiers

**Policies regarding resource use may include:**

- ordering procedures
- time management
- transport/travel policies
- purchasing authorities
- budgeting limits
- recruitment and personnel

**Resource acquisition processes may include:**

- tendered processes
- non-tendered processes
- contracted supplier ordering
- internal approvals
- periodic forecasts

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Collecting and recording data on resource use
- Observing resource use over defined and operational timeframes
- Preparing reports to advise on resource needs
- Accessing resources to maintain operations in line with requirement outcomes
- Undertaking routine maintenance

### Underpinning Knowledge

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of the organisation's resource acquisition policies, plans and procedures
- Understanding the functions of a range of business equipment
- Understanding the organisational procedures for record keeping/filing systems, security and safe recording practices
- Knowledge of organisation's business structure
- Understanding procedures for routine maintenance

At this level the learner must demonstrate some relevant theoretical knowledge.

### Underpinning Skills

- Literacy skills to read and understand organisation's policies and procedures; write simple instructions for a particular routine task
- Proofreading and editing skills to ensure conformity to organisational requirements, check for accuracy and consistency of information
- Evaluation skills to diagnose faults and to monitor resource usage
- Problem solving skills to determine appropriate fault repair actions
- Numeracy skills to calculate resource/equipment expenditure
- Technology skills including the ability to select and use technology appropriate to a task
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

### Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

### Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN308A****Unit Descriptor****Maintain financial records**

This unit covers the maintenance of financial records for a business. It includes activities such as the maintenance of daily financial records, including reconciling debtors' and creditors' systems and preparing a maintaining a general ledger and preparing a trial balance. It also includes activities associated with the monitoring of cash control for accounting purposes.

This unit is related to BSBCMN207A Prepare and process financial/business documents and BSBCMN408A Report on financial activity.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |                                     |   |
|-------------------------------------|---|
| 1. Maintain daily financial records | <p>1.1 Daily financial records are maintained correctly and in accordance with <i>organisational requirements</i> for accounting purposes</p> <p>1.2 <i>Discrepancies</i> or errors in <i>documentation</i> or transactions are identified and rectified or referred to <i>designated persons</i> in accordance with organisational requirements</p> <p>1.3 Credit and debit transactions are accurately and promptly entered into <i>journals</i> in accordance with organisational requirements</p> |
| 2. Maintain general ledger          | <p>2.1 General ledger is maintained in accordance with organisational requirements</p> <p>2.2 <i>Transactions</i> are posted into the general ledger in accordance with organisational reporting requirements</p> <p>2.3 <i>Debtors' and creditors' systems</i> are reconciled with general ledger</p> <p>2.4 Trial balance is accurately prepared from general ledger in accordance with organisational requirements</p>   |
| 3. Monitor cash control             | <p>3.1 Cash flow is accurately accounted for in accordance with organisational requirements</p> <p>3.2 <i>Payments</i> are made and received in accordance with organisational requirements</p> <p>3.3 Outstanding accounts are collected or followed up within designated timelines</p> <p>3.4 Payment documentation is checked for accuracy of information and despatched to creditors within <i>designated timeline</i></p>  |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	2
Collecting analysing and organising information	to process financial documentation	2
Planning and organising activities	for payment of invoices etc within designated timeframes	2
Working with others and in teams	in completing scheduled tasks	1
Using mathematical ideas and techniques	in reconciling financial documents	2
Solving problems	to identify discrepancies and errors	1
Using technology	to complete allocated tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Organisational requirements may include:

- quality assurances and/or procedures manuals
- procedures for totalling adjusted journals
- resolution procedures
- legal and organisational policy/guidelines and requirements
- security procedures
- Occupational Health and Safety policies, procedures and programs
- guidelines for reconciling journals
- Australian accounting and auditing standards
- designated timelines

### Discrepancies may relate to:

- bank charges
- interest
- dishonoured cheques
- errors in transposing between source documents and journals

**Documentation may include:**

- sales invoices
- purchase invoices
- sales credit notes
- purchase credit notes

**Designated persons may include:**

- supervisor
- bank
- organisation's authorisations department
- line management
- statutory body

**Journals may include:**

- sales and sales returns
- cash receipts
- purchases and purchase returns
- cash payments

**Transactions may include:**

- purchase of a fixed asset on credit
- sale of a fixed asset on credit
- correction of posting errors
- write-off a bad debt
- interest expense
- interest receivable
- commencing business entries
- withdrawal of stock/assets by owner
- non-cash transactions (eg writing off depreciation, stock losses)

**Reconciling debtors'/creditors' systems may include:**

- checking accuracy of debtor account balances (eg cash receipts journal, sales return journal, general journal)
- checking accuracy of creditor account balances (eg cash payments journal, purchases journal, purchases returns journal, general journal)
- checking the total of the debtor's schedule equals the balance of the debtor's control account
- checking the total of the creditor's schedule equals the balance of the creditor's control account

**Payments may include:**

- cheque
- credit card
- cash
- direct debit

**Designated timelines may specify:**

- within agreed period
- monthly
- by month end
- within organisational deadline

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Identifying and responding to discrepancies and errors
- Transferring and recording financial data accurately
- Identifying and complying with organisational requirements
- Reconciling expenditures and revenue
- Recommending options for financial decision making

### Underpinning Knowledge

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of organisational policies and procedures relating to maintaining financial records
- Understanding processes to identify relevant source documents and information contained within source documents
- Understanding of the importance of a general ledger chart of accounts in relation to maintain and reporting financial data
- Understanding the definition of credits/creditors and debits/debtors
- Principles of double entry bookkeeping and accrual accounting
- Understanding methods of presenting financial data
- Knowledge of financial legislation references and information
- Understanding practices to include ethical considerations in all areas of work

At this level the learner must demonstrate some relevant theoretical knowledge.

### Underpinning Skills

- Literacy skills to identify financial information; to read and understand the organisation's accounting procedures
- Proofreading and editing skills to ensure conformity to organisational requirements, check for accuracy and consistency of information
- Communication skills to clarify information and refer errors or discrepancies to appropriate people
- Numeracy skills to reconcile figures; prepare cash analysis sheets
- Analysis skills to read and interpret financial data
- Problem solving skills for a defined range of problems
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

### Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance** In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit



**BSBCMN313A****Unit Descriptor****Maintain environmental procedures**

This unit covers the maintenance and monitoring of the organisation's environmental policies and procedures as an integral part of the organisation's business operations. Those who work under instruction but have some autonomy in the workplace should undertake this unit.

This unit is related to BSBCMN215A Participate in environmental work practices and BSBCMN413A Implement and monitor environmental policies. Consider co-assessment with BSBCMN311A Maintain workplace safety.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |                                   |   |
|-----------------------------------|---|
| 1. Maintain workplace procedures  | 1.1 <i>Workplace procedures and work instructions</i> for environmental work practices for own work area or <i>team</i> are conveyed to work team where applicable and are followed accurately<br>1.2 Existing and potential environmental risks are identified, dealt with where possible, and reported to designated personnel, and dealt with<br>1.3 Required changes to workplace practices/procedures are responded to promptly and positively<br>1.4 Contingency plan is implemented immediately when unplanned incidents occur |
| 2. Support continuous improvement | 2.1 <i>Environmental performance</i> for own work area is monitored and recorded<br>2.2 Information is gathered and improvements are <i>suggested</i> to support the development of improved work practices<br>2.3 <i>Environmental training</i> needs of the <i>work team</i> where applicable, and self are identified and further training is sought as required   |
| 3. Maintain recording procedures  | 3.1 <i>Environmental records</i> are accurately and legibly maintained and stored securely in a form accessible for reporting purposes<br>3.2 Internal and external reporting procedures are identified and maintained as required  |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to resolve environmental issues and to report as required	2
Collecting analysing and organising information	to maintain workplace procedures	2
Planning and organising activities	to maintain procedures and support change and improvement	2
Working with others and in teams	to gain support in maintaining and improving procedures	2
Using mathematical ideas and techniques	to aid planning	2
Solving problems	to maintain procedures	2
Using technology	to assist work tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Knowledge of legislation, codes, national standards, industry codes of practice and workplace policies and procedures must:**

- be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science and
- details of legislation must be directly relevant to the workplace role, and would normally be delivered as a general awareness issue rather than a major part of the competencies
- be consistent with the concept that people at this level work under instruction and according to workplace procedures while having some autonomy in the workplace

**Workplace procedures and work instructions may include:**

- procedures for hazard and risk identification and for avoiding or minimising environmental risks
- procedures and instructions may be written or verbal
- signs e.g. toxic or hazardous chemicals
- hazard and incident reporting procedures
- procedures to be followed if spills or accidents occur
- contingency plans which may cover emergency procedures, spills, incidents

**Designated personnel may include:**

- people who are responsible for work area
- or who may be assigned to act as a mentor/trainer

**Work team may include:**

- formal or unstructured groups
- two or more people

**Integration in this sense means:**

- an integrated approach to systems within the organisation eg. between environmental, financial and safety policies

**Information conveyed may include:**

- organisational policies, procedures and work instructions
- relevant environmental legislation requirements
- voluntary environmental agreements entered into with external organisations
- continuous improvement policies and processes
- information on environmental performance

**Environmental performance may be defined as:**

- a measure of an organisation's impact on the environment and of their ability to manage that impact

**Some approaches to improving environmental performance may include:**

- preventing and minimising the production of pollution (eg discharges to air, land and water, hazardous waste)
- improving housekeeping (eg using a broom instead of a hose, using old rags for cleaning instead of toxic cleaners or water)
- substituting materials (eg replacing toxic solvent based coatings with water based ones)
- changing processes (eg mechanical cleaning, re-design products to use materials more efficiently)
- use of products which have less environmental impact

**Environmental management policies may include but are not restricted to:**

- waste minimisation
- tenders for the provision of goods and services that specify environmentally preferred selection criteria
- protection of land and habitat where applicable
- conservation of resources

**Environmental procedures training program should be:**

- integrated into the organisation's existing training arrangements

**Environmental records may include:**

- existing and potential risks
- incidents or accidents
- complaints
- reports

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence needs to be provided of the ability to maintain integrated environmental management policies and procedures within an organisation. Training needs must be identified for self and others (where applicable) and records must be kept.
- N.B. Particular note must be taken that evidence must be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Required knowledge is to be limited to that which is sufficient to perform the particular workplace competency and is intended to promote environmental awareness rather than technical environment competencies
- Recognition of relevant environmental policies and procedures
- Knowledge of best practice approaches relevant to work area particularly in regard to environment hazards and risks and opportunities to improve environmental performance
- Relevant knowledge of environmental issues, especially in regard to water catchments, air, noise, ecosystems, habitat, efficient use of resources and waste minimisation where applicable
- Relevant knowledge of ecological systems in regard to business operation

At this level the learner must demonstrate some relevant theoretical knowledge.

**Underpinning Skills**

- Communication skills to ensure information is supplied to the workgroup
- Literacy skills for comprehending documentation and interpreting environment requirements
- Operational skills including the ability to operate and shut down equipment where required
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN403A****Unit Descriptor****Establish business networks**

This unit covers the skills and knowledge required to develop and maintain effective workplace relationships and networks. It covers the activities of communication and representation.

This unit is related to BSBFLM303A Contribute to effective workplace relationships.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Develop and maintain business networks        | <ul style="list-style-type: none"> <li>1.1 Appropriate <i>network strategies</i> are used to establish and maintain business relationships that promote organisational objectives</li> <li>1.2 Network opportunities are identified and pursued to maximise a range of business contacts</li> <li>1.3 Information regarding new networks is communicated to inform individuals and colleagues of potential benefits to the organisation</li> <li>1.4 <i>Professional networks and associations</i> are participated in to obtain and maintain personal knowledge and skills</li> </ul> |
| 2. Establish and maintain business relationships | <ul style="list-style-type: none"> <li>2.1 Business relationships are developed and maintained to promote benefits consistent with <i>organisational requirements</i></li> <li>2.2 Trust and confidence of business colleagues is gained and maintained through demonstration of high standards of business practices</li> <li>2.3 A high level of <i>negotiation skills</i> are used to encourage positive outcomes</li> <li>2.4 Difficult situations are identified and solutions are negotiated using collaborative problem solving techniques</li> </ul>                           |
| 3. Promote the organisation                      | <ul style="list-style-type: none"> <li>3.1 Strategies are developed to represent and promote the organisation's interests and requirements</li> <li>3.2 Appropriate presentation skills are used to communicate the goals and objectives of the organisation</li> <li>3.3 Issues, policies and practices of the organisation are effectively communicated to a range of audiences in writing and orally</li> <li>3.4 <i>Feedback</i> is obtained to identify and develop ways to improve promotional activities within available opportunities</li> </ul>                              |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to relevant networks	2
Collecting analysing and organising information	to identify and promote networking opportunities	2
Planning and organising activities	to promote the organisation	2
Working with others and in teams	in completing scheduled tasks	2
Using mathematical ideas and techniques	as an aid to measure and schedule tasks	1
Solving problems	to gather and convey information	2
Using technology	to prepare written correspondence	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**They may use legislation, codes and national standards relevant to the workplace including:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Organisational requirements may be included in:**

- quality assurances and/or procedures manuals
- goals, objectives, plans, systems and processes
- legal and organisational policy/guidelines and requirements
- access and equity principles and practice
- ethical standards
- Occupational Health and Safety policies, procedures and programs
- quality and continuous improvement processes and standards
- defined resource parameters
- marketing plan

**Negotiation skills may include:**

- assertiveness
- collaboration
- solution designing
- confidence building
- conflict reduction
- stress management
- empathising

**Network strategies may include:**

- conference participation
- seminar attendance
- association memberships
- maintain regular contact
- individual marketing
- distribution of materials

**Professional networks and associations may include:**

- work team
- suppliers
- other organisations
- committees
- internal/external customers
- government agencies
- professional/occupational associations
- project specific ad hoc consultative/reference groups
- advisory committees
- lobby groups
- local inter-agency groups
- specific interest or support groups

**Feedback on ways to improve promotional activities may include:**

- accuracy and sufficiency of information
- benefits to organisation
- impact of message
- use of media
- liaison with networks
- appropriateness of audience
- participation of competitors

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Negotiating solutions between groups and individuals
- Identifying opportunities for networking
- Presenting information in a variety of formats to a range of audiences
- Establishing, creating and participating in networks
- Maintaining records of relevant contacts
- Evaluating promotional strategies



**Underpinning Knowledge**

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of the organisation's policies, plans and procedures
- Principles of effective communication in relation to listening, questioning and non-verbal communication
- Techniques for building relationships of trust including with people from different cultures
- Understanding the techniques for facilitating mutually acceptable outcomes
- Methods and techniques to prepare and present information to promote the organisation
- Knowledge of related organisations and agencies and networks
- Understanding the principles and operations of networks

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to read and understand a variety of texts; prepare general information and papers according to target audience; spell with accuracy; use grammar and punctuation effectively as an aid to understanding
- Proofreading and editing skills to ensure clarity of meaning and conformity to organisational requirements, check for accuracy and consistency of information
- Communication skills including receiving feedback and reporting, maintaining effective relationships and conflict management
- Evaluation skills for assessing outcomes
- Problem solving skills to manage contingencies
- Negotiation skills to achieve mutually acceptable outcomes
- Leadership skills to gain trust and confidence of clients and colleagues
- Networking skills to participate with other groups and agencies
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN404A****Unit Descriptor****Develop teams and individuals**

This unit covers the skills and knowledge required to determine individual and team development needs and facilitate the development of the workgroup.

This unit is related to BSBCMN304A Contribute to personal skill development and learning.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Determine development needs             | <ul style="list-style-type: none"> <li>1.1 <i>Learning and development needs</i> are systematically identified and implemented in line with <i>organisational requirements</i></li> <li>1.2 A learning plan to meet individual and group training and development needs is collaboratively developed, agreed to and implemented</li> <li>1.3 Individuals are encouraged to self evaluate performance and identify areas for improvement</li> <li>1.4 <i>Feedback on performance</i> of team members is collected from relevant sources and compared with established team learning needs</li> </ul>  |
| 2. Develop individuals and teams           | <ul style="list-style-type: none"> <li>2.1 Learning and development program goals and objectives are identified to match specific knowledge and skill requirements of <i>competency standards</i></li> <li>2.2 <i>Learning delivery methods</i> are appropriate to the learning goals, the learning style of participants, and availability of <i>equipment and resources</i></li> <li>2.3 Workplace learning opportunities and <i>coaching and mentoring assistance</i> are provided to facilitate individual and team achievement of competencies</li> <li>2.4 Development opportunities incorporate a range of activities and support materials appropriate to the achievement of identified competencies</li> <li>2.5 Resources and timelines required for learning activities are identified and approved in accordance with organisational requirements</li> </ul> |
| 3. Monitor and evaluate workplace learning | <ul style="list-style-type: none"> <li>3.1 Feedback from individuals or teams is used to identify and implement improvements in future learning arrangements</li> <li>3.2 Outcomes and performance of individuals/teams are assessed and recorded to determine the effectiveness of development programs and the extent of additional development support</li> <li>3.3 Modifications to learning plans are negotiated to improve the efficiency and effectiveness of learning</li> <li>3.4 Records and reports of competency are documented and maintained within organisational requirements</li> </ul>   |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	2
Collecting analysing and organising information	to measure team performance	2
Planning and organising activities	for learning opportunities	2
Working with others and in teams	in completing scheduled tasks	2
Using mathematical ideas and techniques	as an aid to measure learning outcomes	2
Solving problems	as an aid to team-development	2
Using technology	to manage scheduling of tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**They may use legislation, codes and national standards relevant to the workplace including:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Learning and development needs may include:**

- coaching, mentoring and/or supervision
- formal/informal learning programs
- internal/external training provision
- work experience/exchange/opportunities
- personal study
- career planning/development
- performance appraisals
- workplace skills assessment
- Recognition of Prior Learning

**Organisational requirements may be included in:**

- quality assurances and/or procedures manuals
- goals, objectives, plans, systems and processes
- legal and organisational policy/guidelines and requirements
- Occupational Health and Safety policies, procedures and programs
- confidentiality and security requirements
- business and performance plans
- anti-discrimination and related policy
- access and equity principles and practice
- ethical standards
- quality and continuous improvement processes and standards
- defined resource parameters

**Feedback on performance may include:**

- formal/informal performance appraisals
- obtaining feedback from supervisors and colleagues
- obtaining feedback from clients
- personal, reflective behaviour strategies
- routine organisational methods for monitoring service delivery

**Competency standards are standards which measure:**

- all those personal and technical knowledge, skills and attitudinal aspects (competencies) required to effectively and efficiently undertake the day to day tasks and duties of the practitioner's work function

**Learning delivery methods may include:**

- on-the-job coaching or mentoring
- problem solving
- presentations/demonstrations
- formal course participation
- work experience
- involvement in professional networks
- conference and seminar attendance
- induction

**Equipment and resources may include:**

- funding
- facilities
- guest speakers
- training equipment such as whiteboards and audio-visual equipment
- technological tools and equipment
- time

**Coaching and mentoring assistance may include:**

- providing feedback to another team member
- fair and ethical practice
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Identifying and implementing learning opportunities for others
- Giving and receiving feedback constructively
- Facilitating participation of individuals in the work of the team
- Negotiating learning plans to improve the effectiveness of learning
- Preparing learning plans to match skill needs
- Accessing and designing learning opportunities

### Underpinning Knowledge

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of the principles of coaching and mentoring for development of competence
- Understanding how to work effectively with team members who have diverse work styles, aspirations, cultures and perspectives
- Understanding how to facilitate team development and improvement
- Knowledge of the organisation's policies, plans and procedures
- Understanding methods and techniques for eliciting and interpreting feedback
- Understanding methods for identifying and prioritising personal development opportunities and options
- Knowledge of career paths and competency standards in the industry

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to read and understand a variety of texts; prepare general information and papers according to target audience; spell with accuracy; use grammar and punctuation effectively as an aid to understanding; maintain records of learning
- Communication skills including receiving feedback and reporting, maintaining effective relationships and conflict management
- Planning skills to organise required resources and equipment to meet learning needs
- Coaching and mentoring skills to provide support to colleagues
- Report writing skills to organise information; assess information for relevance and accuracy; identify and elaborate on learning outcomes
- Facilitation skills to conduct small group training sessions
- Time management skills for scheduling learning programs within work activities
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCM406A****Unit Descriptor****Maintain business technology**

This unit covers the skills and knowledge required to maintain the effectiveness of business technology in the workplace. It includes activities such as the maintenance of existing technology and the planning of future technology requirements.

This unit is related to BSBCM307A Maintain business resources. Consider co-assessment with BSBCM407A Coordinate business resources.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Maintain performance of hardware and software | 1.1 Systems effectiveness is monitored and evaluated to ensure it meets <i>organisational and system requirements</i><br>1.2 Operating system, drive and disk structure, reports and files are used to identify performance problems<br>1.3 <i>Disk drives and peripherals</i> are maintained according to manufacturers' and organisational requirements<br>1.4 <i>Consumables</i> are replaced in accordance with the manufacturers' and organisational requirements<br>1.5 <i>Software</i> applications are installed and operated in accordance with developers' and organisational requirements |
| 2. Provide basic system administration           | 2.1 System back up procedure is carried out at regular intervals according to organisational and system requirements<br>2.2 Security access procedures are maintained in line with organisational requirements<br>2.3 Licence for use of software is used, checked and recorded in accordance with organisational requirements<br>2.4 Virus systems are maintained and updated on a regular basis in accordance with organisational requirements   |
| 3. Identify future technology requirements       | 3.1 <i>Sources of information</i> about new <i>technology</i> are accessed to maintain knowledge in current technology<br>3.2 Feedback from clients and colleagues is used to identify and develop <i>improved technology systems</i><br>3.3 Existing technology is assessed against newly available technology to determine future needs and priorities<br>3.4 New technologies are identified and selected to achieve and maintain continuous organisational development<br>3.5 Management and budget approval is obtained for new technologies identified and selected                            |



## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	2
Collecting analysing and organising information	to formulate recommendations	2
Planning and organising activities	to maintain business technology	2
Working with others and in teams	in completing scheduled tasks	1
Using mathematical ideas and techniques	as an aid to measure and schedule tasks	2
Solving problems	to identify future technology requirements	2
Using technology	to complete allocated tasks	3

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Organisational and system requirements may include:

- quality assurances and/or procedures manuals
- back up procedures
- security and confidentiality procedures
- legal and organisational policy/guidelines and requirements
- storage retrieval and type of product licenses
- storage of information technology documentation
- register of licenses
- Occupational Health and Safety policies, procedures and programs
- code of conduct
- ethical standards
- maintenance of customised software
- updating of virus protection systems

**Disk drives and peripherals maintenance may include:**

- creating more free space on the hard disk
- reviewing programs
- deleting unwanted files
- cleaning dust from internal and external surfaces
- backing up files before major maintenance
- checking hard drive for errors
- defragmenting the hard disk
- using up-to-date anti-virus programs

**Consumables may include:**

- printer ribbons and cartridges
- print heads
- disks
- magnetic tape and cassettes
- print media

**Software may include:**

- word processing applications
- spreadsheet applications
- accounting applications
- database applications
- presentation applications
- internet/intranet/extranet related programs

**Information sources on new technology may include:**

- industry associations
- seminars, workshops and training sessions
- the Internet
- computer magazines and journals
- trade fairs
- computer software designers
- computer hardware manufacturers
- internal/external clients
- retail outlets

**Technology may include:**

- computers
- modems
- software
- client services
- data transfer devices
- scanners
- photocopiers
- printers

**Improved technology systems may include:**

- access protocols
- cable data transmissions
- delivery and installation systems
- maintenance options
- multi-media
- networking options
- resource usage monitoring

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Evaluating and mapping network operations
- Reviewing compliance with system protocols
- Installing software and hardware
- Organising and accessing software, materials and consumables
- Maintaining virus, backup and security systems in line with organisational requirements
- Identifying new technologies which match the future needs of the organisation

### Underpinning Knowledge

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of the costs and benefits of technology maintenance strategies
- Knowledge of organisation's operating systems, including knowledge of networks
- Principles of developing a maintenance schedule for a network
- Knowledge of back up and security procedures, maintenance and diagnostic procedures, licensing and installation and purchasing procedures
- Understanding current industry accepted hardware and software products including knowledge of general features and capabilities
- Understanding organisational business plans, goals and directions
- Understanding methods and processes to prepare budget and cost analysis
- Knowledge of access protocols (eg. internet, TP/TCP)

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to interpret and evaluate the purposes and objectives of various uses of technology; display logical organisation of written information
- Research and analysis skills to analyse and identify organisation's future technology requirements
- Problem solving skills for common network problems
- Report writing skills to organise information from a range of sources to form recommendations
- Analytical skills in relation to systems administration
- Diagnostic skills in relation to identifying problems or faults
- Decision making skills for purchasing of new technology
- Interpersonal skills for cooperating with others on system use
- Presentation skills for explaining the operation of technology in a business environment
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN407A****Unit Descriptor****Coordinate business resources**

This unit covers the skills and knowledge required to determine and analyse existing and required resources, their effective application and the accountability for their use.

This unit is related to BSBCMN307A Maintain business resources. Consider co-assessment with BSBCMN406A Maintain business technology.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Determine resource requirements      | <ul style="list-style-type: none"> <li>1.1 <i>Resource requirements</i> are determined in accordance with business and operational plans and <i>organisational requirements</i></li> <li>1.2 Opportunities are given to individuals and workgroups to contribute to the identification of resource requirements</li> <li>1.3 Resource expenditure is realistic and makes efficient use of available budget resources</li> <li>1.4 Recommendations on resource requirements are presented in the required format, style and structure using relevant <i>business equipment and technology</i></li> </ul>   |
| 2. Acquire and allocate resources       | <ul style="list-style-type: none"> <li>2.1 Physical resources and services are acquired in accordance with organisational requirements</li> <li>2.2 Resources are checked to ensure quality and quantity in line with service agreements</li> <li>2.3 Resources are allocated promptly to enable achievement of work group objectives</li> <li>2.4 Consultation with individuals and teams on allocation of resources is participative and is conducted using appropriate <i>interpersonal skills</i></li> </ul>  |
| 3. Monitor and report on resource usage | <ul style="list-style-type: none"> <li>3.1 The effectiveness of resource planning is measured and assessed against actual costs and identified shortfalls and surpluses</li> <li>3.2 Methods of monitoring resource use are developed and implemented to enable timely and accurate reporting against business and operating plans</li> <li>3.3 Improvements in resource planning are identified through consultation and <i>feedback</i> and implemented in accordance with organisational requirements</li> <li>3.4 <i>Records</i> concerning equipment and resource purchases are maintained in accordance with organisational requirements</li> </ul> |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	2
Collecting analysing and organising information	to identify resource needs	2
Planning and organising activities	to coordinate resources	2
Working with others and in teams	in completing scheduled tasks	2
Using mathematical ideas and techniques	as an aid to estimate resource usage	1
Solving problems	to identify equipment faults	2
Using technology	to complete allocated tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace including:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Resource requirements may include:

- technological equipment/software
- plant/machinery
- stock and supplies
- Occupational Health and Safety resources
- staff amenities
- human resources
- training materials
- storage space
- location/premises
- refurbishment
- raw materials

**Organisational requirements may be included in:**

- quality assurances and/or procedures manuals
- goals, objectives, plans, systems and processes
- legal and organisational policy/guidelines and requirements
- business and performance plans
- security and confidentiality requirements
- management and accountability channels
- access and equity principles and practice
- ethical standards
- Occupational Health and Safety policies, procedures and programs
- quality and continuous improvement processes and standards
- defined resource parameters
- reporting requirements
- manufacturers' and operational specifications

**Business equipment/technology may include:**

- photocopier
- computer
- printer
- binder
- shredder
- answering machine
- fax machine
- telephone

**Appropriate interpersonal skills may include:**

- using appropriate body language
- summarising and paraphrasing
- consultation methods, techniques and protocols
- clarity of language
- seeking feedback from group members to confirm understanding

**Feedback sources may include:**

- customer/client response data
- employee data
- sales orders
- financial forecasts
- supplier's invoices
- equipment meter readings

**Records may include:**

- computerised or manual
- financial statements
- stock list and inventory control
- purchase orders
- invoices
- maintenance schedules
- order forms
- petty cash forms

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Monitoring resource usage to determine resource needs
- Maintaining records of resource requirements
- Identifying and communicating of faults and/or risks to appropriate people
- Calculating costs and expenditures
- Negotiating with others in relation to access to resources

### Underpinning Knowledge

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Understanding the organisation's policies, plans and procedures
- Understanding the functions of a range of business equipment
- Knowledge of correct start-up and shut-down procedures for a range of business equipment
- Understanding common equipment faults
- Knowledge of principles of designing maintenance schedules for plant, equipment and business technology
- Understanding evaluation processes for resource monitoring purposes
- Knowledge of record management processes and techniques related to maintenance schedules
- Knowledge of decision making techniques for allocating resources between competing priorities

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

### Underpinning Skills

- Literacy skills to draft complex reports and display logical information on resource usage
- Communication skills to request advice, receive feedback and work with a team
- Diagnostic skills to identify problems with resource use
- Numeracy skills to interpret, compare and calculate resource usage costs
- Report writing skills to organise and present information considering aspects of context, purpose and audience
- Planning skills to schedule resource use and availability
- Analytical skills to define parameters for resource use
- Technology skills including the ability to select and use technology appropriate to a task
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

### Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace



**Consistency of Performance** In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCM408A****Unit Descriptor****Report on financial activity**

This unit covers the reporting of financial activity for business both in response to client requests and to meet statutory requirements such as the completion of statutory requirement reports.

This unit is related to BSBCM308A Maintain financial records.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Compile financial information and data     | <ul style="list-style-type: none"> <li>1.1 Current <i>financial data</i> is collected, evaluated and coded to ensure consistency, quality and accuracy in accordance with <i>organisational requirements</i></li> <li>1.2 <i>Conversion and consolidation procedures</i> are used to compile analysis in accordance with organisational requirements</li> <li>1.3 Asset and liability valuations are made, recorded and disclosed in accordance with organisational requirements</li> <li>1.4 <i>Discrepancies</i>, unusual features or queries are identified, resolved or referred to the appropriate authority</li> </ul>  |
| 2. Prepare statutory requirement reports      | <ul style="list-style-type: none"> <li>2.1 Income and expenditure is correctly recorded to ensure compliance with <i>statutory requirements</i></li> <li>2.2 Liabilities for tax are calculated in accordance with current legislation and <i>revenue gathering practices</i></li> <li>2.3 Relevant receipts, <i>revenue documentation</i> and payments are identified correctly</li> <li>2.4 Statements and claims take full advantage of <i>available benefits and allowances</i> in accordance with statutory requirements</li> <li>2.5 Statutory requirement reports are submitted to appropriate authorities within <i>stated deadlines</i></li> </ul>                   |
| 3. Provide financial business recommendations | <ul style="list-style-type: none"> <li>3.1 <i>Recommendations</i> are logically derived and supported by <i>evidence</i> in report</li> <li>3.2 Recommendations propose constructive actions to enhance the effectiveness and efficacy of functions and services</li> <li>3.3 Recommendations are concise and facilitate direction and control of organisation's operations</li> <li>3.4 <i>Significant issues</i> in statements including comparative financial performances are identified and prioritised for review and decision-making</li> <li>3.5 Structure and <i>format</i> of reports are clear and conform to organisational and statutory requirements</li> </ul> |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with members of the work team	2
Collecting analysing and organising information	to forecast and provide recommendations	3
Planning and organising activities	for completion of statutory returns and reports	2
Working with others and in teams	in completing scheduled tasks	2
Using mathematical ideas and techniques	in reconciling financial documents	3
Solving problems	to identify discrepancies and errors	2
Using technology	to complete allocated tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Financial data may include:

- budgets and forecasts
- financial/operational statements and reports (eg. expenditures and receipts, profit and loss statements)
- market valuations
- budget variances
- cash flow/profit reports
- Australian Bureau of Statistics (ABS) economic data
- financial markets monitoring services (eg, Reuters)

- Organisational requirements may include:**
- quality assurances and/or procedures manuals
  - price and exchange parameters
  - reporting requirements
  - legal and organisational policy/guidelines and requirements
  - financial analysis assessments
  - Occupational Health and Safety policies, procedures and programs
  - recording and filing systems
  - standard financial analysis techniques
  - financial management manuals
- Conversion and consolidation procedures may include:**
- spreadsheets
  - standardised variables
  - moving averages
  - unit costs
  - trend analysis
- Discrepancies may include:**
- expenditure report mismatches
  - incorrect payments
  - absence of auditable trail
  - inappropriate authorisations
  - variances from budget and phasings
  - unreconciled cash flows and operating statements
  - incorrect report formats
- Statutory requirements may include:**
- reporting periods
  - taxation payment timings
  - delegated authorities
  - internal control procedures
- Revenue gathering practices may include:**
- sales
  - leasing
  - investments
  - billing schedules
  - lending and financing
  - fees and charges
- Revenue documentation may include:**
- invoices
  - declarations
  - bills
  - sales proceeds
  - cash received
  - debit notes
- Available benefits and allowances may include:**
- depreciation
  - donations
  - sales tax deductions
  - interest payments

**Stated deadlines may include:**

- monthly returns
- annual reports
- lodgement dates
- payment schedules

**Recommendations may relate to:**

- profit
- loss
- expenses
- consolidation
- write-offs
- cash flow

**Evidence may include:**

- budgetary analysis
- forecasts and estimates
- returns on investments
- order and supplier documentation
- taxation and statutory returns

**Significant issues may include:**

- profitability
- losses and returns
- cost structures
- suppliers
- internal controls
- statutory obligations

**Format of reports may include:**

- cash flow statements
- statutory forms
- financial year reports
- balance sheets
- operating statements
- spreadsheets
- electronic forms

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Organising financial data to highlight relevant features
- Presenting of information in comprehensive formats
- Completing of Business Activity Statements
- Interpreting and identifying applications of statutory requirements
- Referring discrepancies outside scope of own responsibility to the appropriate persons

**Underpinning Knowledge**

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of organisational policies and procedures relating to maintaining financial data, reporting, preparing statutory returns
- Principles of double entry bookkeeping and accrual accounting
- Knowledge of techniques for forecasting and analysis
- Understanding methods to present financial data
- Knowledge of State and Federal Government taxes and charges
- Knowledge of financial legislation
- Knowledge of options, methods and practices for deductions, benefits and depreciations
- Principles and practices for auditing and reporting

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to identify financial information, to follow Australian Accounting and Auditing Standards and the organisation's accounting procedures
- Research skills to analyse the organisations financial and business status
- Proof reading skills to check accuracy and consistency of information by consulting additional resources
- Problem solving skills for a defined range of predictable problems
- Report writing skills to assess information for relevance and accuracy from a range of sources
- Decision making skills in a limited range of options
- Numeracy skills for calculating data, reconciling figures
- Planning skills for timetabling and scheduling reports and lodgements
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN409A****Promote products and services****Unit Descriptor**

This unit covers the skills and knowledge required to coordinate and review the promotion of an organisation's products and services.

This unit is related to BSBCMN309A Recommend products and services.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Plan promotional activities                 | <p>1.1 <i>Promotional activities</i> are identified and assessed to ensure compatibility with <i>organisational requirements</i></p> <p>1.2 Promotional activities are planned and scheduled according to the marketing needs of the organisation</p> <p>1.3 Overall promotional objectives are determined in consultation with <i>designated individuals and groups</i></p> <p>1.4 Timelines and costs for promotion of activities are realistic and consistent with budget resources</p> <p>1.5 Action plans are developed to provide details of product and services being promoted</p>   |
| 2. Coordinate promotional activities           | <p>2.1 <i>Personnel and resources</i> to support promotional activities are identified and prepared to facilitate the achievement of promotional goals</p> <p>2.2 <i>Roles and responsibilities</i> for delivery of promotional services are identified, agreed, and allocated to relevant personnel</p> <p>2.3 Relationships with targeted groups are established and conducted in a manner which enhances the positive image of the organisation</p> <p>2.4 <i>Networks</i> are used to assist in the implementation of promotional activities</p>   |
| 3. Review and report on promotional activities | <p>3.1 Audience feedback and data are analysed to determine the impact of the promotional activity on the delivery of products and services</p> <p>3.2 Effectiveness of planning processes are assessed to identify possible improvements in future activities</p> <p>3.3 <i>Feedback</i> is collected and provided to personnel and agencies involved in the promotional activity</p> <p>3.4 Costs and timelines are analysed to evaluate the benefits accruing from the promotional activities</p> <p>3.5 Conclusions and recommendations are prepared from verifiable evidence and provide constructive advice on future directions of promotional activities</p> |



## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	with customers on products and services	2
Collecting analysing and organising information	to promote products and services	2
Planning and organising activities	to meet promotional requirements	2
Working with others and in teams	in completing scheduled tasks	2
Using mathematical ideas and techniques	to determine promotional costs	2
Solving problems	to respond to promotional problems	2
Using technology	to complete allocated tasks	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Promotional activities may include:**

- media announcements
- employee functions
- client functions
- product launches
- advertisements
- web pages

**Organisational requirements may include:**

- quality assurances and/or procedures manuals
- goals, objectives, plans, systems and processes
- legal and organisational policy/guidelines and requirements
- Occupational Health and Safety policies, procedures and programs
- confidentiality and security requirements
- access and equity principles and practice
- ethical standards
- quality and continuous improvement processes and standards
- defined resource parameters
- who is responsible for products or services
- pricing and discount policies
- replacement and refund policy and procedures
- payment and delivery options
- filing and documentation storage processes

**Designated individuals and groups may include:**

- supervisor
- customers
- colleagues
- external organisations
- committees
- line management

**Personnel and resources may include:**

- organisational personnel
- time
- samples
- management
- marketing funds
- technology
- venue
- promotional products

**Roles and responsibilities may include:**

- job description and employment arrangements
- organisation's policy relevant to work role
- marketing plans
- team structures
- supervision and accountability requirements including Occupational Health and Safety
- skills, training and competencies
- Code of Conduct

**Networks may include:**

- professional
- company
- internal
- social
- media and promotional
- customer

**Feedback may be collected from sources such as:**

- customer/client response data
- employee data
- sales orders
- market share data
- focus groups

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Designing and organising meetings and presentations
- Evaluating promotional impacts
- Presenting and advocating promotional strategies within the organisation
- Assessing and reporting on customer satisfaction
- Calculating costs of promotions

**Underpinning Knowledge**

- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Understanding of organisation's business structure, products and services
- Knowledge of planning processes for organising promotional activities
- Knowledge of the organisation's policy and procedures for customer service including handling customer complaints
- Knowledge of the organisation's marketing plan and associated budgets
- Understanding of product and service standards and best practice models
- Principles and techniques of public relations and product promotion
- Knowledge of consultation methods, techniques and protocols
- Knowledge of mechanisms to obtain and analyse customer feedback

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to read a variety of texts; prepare general information and papers; write formal and informal letters according to target audience
- Technology skills including the ability to select and use technology appropriate to a task
- Problem solving skills to manage contingencies in promotional activities
- Numeracy skills to analyse data and compare timelines and promotional costs against budgets
- Evaluation skills to assess impact of promotions
- Analytical skills to identify trends and positions of products and services
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBCMN413A****Unit Descriptor****Implement and monitor environmental policies**

This unit covers the implementation and monitoring of the organisation's environmental policies and procedures as an integral part of the organisation's business program. Those who work or who expect to work in a supervisory capacity would be advised to undertake this unit. It could also be useful for small business.

This unit is related to BSBCMN313A Maintain environmental procedures and BSBMGT506A Manage environmental performance. Consider co-assessment with BSBCMN411A Monitor a safe workplace.

**Competency Field**

Common

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Provide information to the work team                    | <p>1.1 <i>Information</i> provided to the work team is explained in a clear and concise manner and is readily accessible by all employees</p> <p>1.2 Organisation's <i>activities/performance</i> in regard to <i>environmental management and business sustainability</i> are conveyed to work team where required</p> <p>1.3 Links between environmental, financial, safety and other risk areas and how these are integrated in organisational policies and practices are explained</p> <p>1.4 Information on environmental systems and procedures and other risk areas within the area of management responsibility is provided</p> |
| 2. Implement and monitor operational procedures            | <p>2.1 Existing and potential <i>environmental risks</i> are identified and <i>assessed</i> and/or <i>expert advice</i> sought as required</p> <p>2.2 Prioritised recommendations from the assessments are carried out as part of the organisation's operational procedures</p> <p>2.3 Organisational environmental policies and procedures are implemented</p> <p>2.4 Tasks are allocated and outcomes are monitored in accordance with organisational policies and targets</p> <p>2.5 Contingency plan is implemented promptly when incidents occur</p>   |
| 3. Implement and monitor change and continuous improvement | <p>3.1 <i>Environmental improvement plans</i> are implemented for own work group and integrated with other operational activities</p> <p>3.2 <i>Best practice approaches</i> to improving environmental performance by reducing environmental risk and waste are identified, implemented and monitored</p> <p>3.3 Suggestions and ideas about environmental management are sought from the work team and acted upon where appropriate</p> <p>3.4 Suggestions are sought from <i>supply chain</i>, at tender/contract stage, for ways of improving environmental performance</p>   |
| 4. Implement and monitor recording procedures              | <p>4.1 Internal and external reporting procedures are identified and implemented as required</p> <p>4.2 <i>Environmental records</i> are accurately and legibly maintained and stored securely in a form accessible for reporting purposes</p> <p>4.3 Information/records are monitored to identify trends that may require remedial action, and used to promote continuous improvement of environment performance</p>  |

5. Implement and monitor an environmental management training program
- 5.1 *Environmental training* needs are identified accurately, specifying gaps between environmental competencies required and those held by group members
- 5.2 Arrangements are made for fulfilling identified training needs for the work group with relevant parties

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to resolve environmental issues with the work team and external contacts	2
Collecting analysing and organising information	to provide information and advice	2
Planning and organising activities	to plan training and to implement change and improvement	2
Working with others and in teams	to gain support for environmental policies	2
Using mathematical ideas and techniques	to aid planning	2
Solving problems	to implement change and maintain procedures	2
Using technology	to assist implementation	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Knowledge of legislation, codes, national standards, industry codes of practice and workplace policies and procedures must:

- be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science and
- details of legislation must be directly relevant to the workplace role, and would normally be delivered as a general awareness issue rather than a major part of the competencies
- be consistent with the concept that people at this level, while working with some autonomy and possibly responsibility for the work of others, still generally work according to workplace policies and procedures

**Information may include:**

- organisational policies and procedures
- relevant environmental legislation requirements
- voluntary environmental agreements entered into with external organisations
- continuous improvement policies and processes for the organisation
- environmental data

**Work team may include:**

- formal or unstructured groups
- two or more people

**Environmental performance may be defined as:**

- a measure of an organisation's impact on the environment and of their ability to manage that impact

**Some approaches to improving environmental performance may include but are not restricted to:**

- preventing and minimising the production of pollution (eg discharges to air, land and water, hazardous waste)
- improving housekeeping (eg using a broom instead of a hose, using old rags for cleaning instead of toxic cleaners or water)
- substituting materials (eg replacing toxic solvent based coatings with water based ones)
- changing processes (eg mechanical cleaning, re-design of products/ procedures so that materials are used more efficiently)

**Environmental management policies must be appropriate to the scope and scale of the business and may include:**

- environmental load reduction and waste minimisation
- tenders for the provision of goods and services that specify environmentally preferred selection criteria
- protection of land and habitat
- environmentally sustainable work practices
- continuous improvement policies

**Business sustainability means:**

- a sustainable business in this sense is profitable and competitive for the foreseeable future. Effective management of environmental impacts and opportunities can contribute to business sustainability by reducing costs, differentiating goods and services and contributing to a better corporate image.

**Environmental improvement plans may be established at management level and may include:**

- measuring, monitoring and recording environmental performance, and continually setting targets for measurable improvements
- all aspects of environmental performance including energy use, waste minimisation, recycling, transport use etc

**Expert assistance and/or advice may be sought from:**

- internal or external sources/specialists
- consultants or other experts or specialists

**Links between environmental, financial and safety policies means:**

- an integrated approach to systems within the organisation

**Supply chain can be:**

- a key determinant of environmental performance
- a source of positive input and advice to enhance environmental performance

**Supply chain may include:**

- suppliers
- contractors
- others acting on organisation's behalf

**Environmental risks may be identified as:**

- actual and potential sources of *waste*
- pollution (eg discharges to air, land and water, hazardous waste)
- planned or unplanned emissions or
- any aspect of the business operation which may have an impact on environmental performance

**and may be assessed:**

- on an ongoing basis
- with regard to probability, scale and likely impact on business and environmental performance

**Environmental training program should be:**

- integrated into the organisation's existing training arrangements

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence needs to be provided of the ability to implement and monitor integrated environmental management policies and procedures within an organisation. The work team must be informed of environmental and other risk areas, training needs must be addressed and records must be kept.
- N.B. Particular note must be taken that evidence must be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science



**Underpinning Knowledge**

- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- required knowledge is to be limited to that which is sufficient to perform the particular workplace competency and is intended to promote environmental awareness rather than technical environment competencies
- relevant environmental systems and procedures
- knowledge of best practice approaches relevant to own work area
- quality assurance systems relevant to own work area
- supply chain procedures
- strategies to maximise opportunities and minimise impacts relevant to own work area
- relevant knowledge of environmental issues especially in regard to water catchments, air, noise, ecosystems, habitat, waste minimisation relevant to own work area

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- communication skills to ensure information is supplied to the work team
- consultation skills to assist in workplace negotiations
- literacy skills for comprehending documentation and interpreting environment requirements
- operational skills relevant to the workplace, including the ability to operate and shut down equipment
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit

**BSBFLM303A****Unit Descriptor****Contribute to effective workplace relationships**

This unit covers the skills and knowledge required to develop, establish and maintain effective workplace relationships and networks. It covers the activities of communication and representation.

At this level, work will normally be carried out within known routines, methods and procedures which require the exercise of some discretion and judgement.

This unit is related to BSBCMN403A Establish and maintain effective business relationships and networks.

**Unit Sector**

No Sector Assigned

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Gather, convey and receive information and ideas | 1.1 Information to achieve work responsibilities is collected from appropriate sources<br>1.2 The method(s) used to communicate ideas and information is appropriate to the audience<br>1.3 Communication takes into account social and cultural diversity<br>1.4 Input from internal and external sources is sought, and valued in developing and refining new ideas and approaches   |
| 2. Develop trust and confidence                     | 2.1 People are treated with integrity, respect and empathy<br>2.2 The organisation's social, ethical and business standards are used to develop and maintain positive relationships<br>2.3 Trust and confidence of colleagues, customers and suppliers is gained and maintained through competent performance<br>2.4 Interpersonal styles and methods are adjusted to the social and cultural environment  |
| 3. Build and maintain networks and relationships    | 3.1 Networking is used to identify and build relationships<br>3.2 Networks and other work relationships provide identifiable benefits for the team and organisation<br>3.3 Action is taken to maintain the effectiveness of workplace relationships  |
| 4. Manage difficulties to achieve positive outcomes | 4.1 Problems are identified and analysed, and action is taken to rectify the situation with minimal disruption to performance<br>4.2 Colleagues receive guidance and support to resolve their work difficulties<br>4.3 Poor work performance is managed within the organisation's processes<br>4.4 Conflict is managed constructively within the organisation's processes<br>4.5 Difficult situations are negotiated to achieve results acceptable to the participants, and which meet organisation's and legislative 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

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The general workplace context for this AQF level is described in the AQF level descriptor. In addition, the following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- Award and enterprise agreements and relevant industrial instruments
- Relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Relevant industry codes of practice
- Legislation, codes and national standards relevant to the workplace which may include:
  - Award and enterprise agreements and relevant industrial instruments
  - Relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
  - Relevant industry codes of practice

**At AQF level 3, frontline management will normally be engaged in a workplace context where they:**

- Engage in short term planning within the department's business plans. For example, prepares a weekly schedule of outputs and / or outcomes to be achieved
- Take responsibility for own outputs in work and learning. For example, assesses own performance and identifies the competencies which need to be upgraded / developed
- Take limited responsibility for the output of others. For example, provides coaching support to assist individuals meet their performance requirements
- Demonstrate some relevant theoretical knowledge. For example, explains the purpose of key performance indicators to others
- Perform a defined range of skills, usually within known routines, methods and procedures and within known time constraints. For example, provides services to internal customers within an agreed schedule
- Apply known solutions to a variety of predictable problems. For example, within the organisation's standard procedures considers the options and, using some discretion and judgement, selects the preferred action to rectify faulty service to a customer
- Interpret available information, using some discretion and judgement in work responsibilities. For example, interprets the continuous improvement processes, procedures and documentation used by the team and decides how to apply them to own work function

**Frontline management at this level normally operate in a relatively simple and routine workplace environment in which they use the organisation's:**

- Goals, objectives, plans, systems and processes
- Business and performance plans
- Access and equity principles and practice
- Ethical standards
- Quality and continuous improvement processes and standards
- Defined resource parameters

**Sources of information may be**

- Internal or external and print or non-print

**The organisation's social, ethical and business standards refers to**

- Those relevant to frontline management's work activities. They may be written or oral, stated or implied

**Colleagues may include**

- Team members, employees at the same level and more senior managers, and may include people from a wide variety of social, cultural and ethnic backgrounds

**Customers and suppliers would typically be from**

- Internal sources, although there may be some limited external contact

**Networks may be**

- internal and / or external. They may be with individuals or groups, either through established structures or through unstructured arrangements

**Guidance and support may be**

- Provided by frontline management or arranged from alternative internal or external sources

**OHS considerations may include:**

- OHS practice as an ethical standard as well as legislative requirements
- Organisation's responsibilities to customers and suppliers
- Change communication to cater for social and cultural diversity

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Establishes and maintains positive work relationships
- Develops trust and confidence
- Accesses and analyses information to achieve planned outcomes
- Resolves problems and conflicts effectively and efficiently

**Underpinning Knowledge**

Underpinning knowledge relates to the essential knowledge and understanding a person needs to perform work to the required standard

Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination

At this level the learner must demonstrate some relevant theoretical knowledge.

**The principles and techniques associated with:**

- Developing trust and confidence
- Consistent behaviour in work relationships
- Identifying the cultural and social environment
- Identifying and assessing interpersonal styles
- Establishing networks
- Problem identification and resolution
- Handling conflict
- Managing poor work performance
- Managing relationships to achieve planning responsibilities
- Monitoring and introducing ways to improve work relationships
- Contributing to the elimination of discrimination / bias

**Underpinning Skills**

- Functional literacy skills to access and use workplace information
- Communication skills including researching, analysing and interpreting information from a variety of people, reporting
- Responding to unexpected demands from a range of people
- Using consultative processes effectively
- Forging effective relationships with internal and / or external people
- Gaining the trust and confidence of colleagues
- Dealing with people openly and fairly
- Using coaching and mentoring skills to provide support to colleagues
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

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

Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

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

Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competencies Levels at the end of this unit

**BSBFLM404A****Lead work teams****Unit Descriptor**

This unit is equivalent to the original unit BSXFMI404A Participate in, lead and facilitate work teams.

This unit covers the skills and knowledge required to lead a team or work group in a business environment. It includes developing plans, providing leadership and supervising the performance of a group.

This unit is related to BSBCMN301A Exercise initiative in a business environment. Consider co-assessment with BSBFLM402A Show leadership in the workplace, BSBFLM403A Manage effective workplace relationships, BSBFLM406A Implement workplace information system, and BSBFLM411A Contribute to the development of a workplace learning environment.

**Unit Sector**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |  |   |
|--|---|
| 1. Participate in team planning                | 1.1 The <i>manager</i> assists the <i>team</i> establish its purpose, roles, responsibilities and accountabilities in accordance with the <i>organisation's goals, plans and objectives</i><br>1.2 The manager assists the team monitor and adjust its performance within the organisation's continuous improvement policies and processes<br>1.3 The manager encourages the team to use the <i>competencies</i> of each member for team and individual benefit |
| 2. Develop team commitment and co-operation    | 2.1 The manager assists the team to use open communication processes to obtain and share information<br>2.2 The team makes decisions in accordance with its agreed roles and responsibilities<br>2.3 The manager supports the team to develop mutual concern and camaraderie  |
| 3. Manage and develop team performance         | 3.1 The results achieved by the team contribute positively to the organisation's business plans<br>3.2 The manager encourages the team to exploit innovation and initiative<br>3.3 Team and individual competencies are monitored regularly to confirm that the team is able to achieve its goals<br>3.4 Team members share and enhance their <i>knowledge and skills</i>   |
| 4. Participate in and facilitate the work team | 4.1 Team members participate actively in team activities and communication processes<br>4.2 Individuals and teams take individual and joint responsibility for their actions<br>4.3 The team receives support to identify and resolve problems which impede its performance   |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to assist team planning	2
Collecting analysing and organising information	with members of work team	2
Planning and organising activities	in association with team	3
Working with others and in teams	to achieve team goals	2
Using mathematical ideas and techniques	to assist the development of team plans	1
Solving problems	to assist team performance	3
Using technology	to assist the management of information	1

Three levels of performance denote level of competency required to perform a task.

1. Perform
2. Administer
3. Design

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice



**At AQF level 4, frontline management will normally be engaged in a workplace context where they:**

- engage in short to medium term planning within the organisation's business plans. For example, prepares six monthly plan of the department's productivity targets within the organisation's business plans
- take responsibility for own outputs in relation to specific quality standards. For example, assesses own management performance against the organisation's standards of management
- take limited responsibility for the quality and quantity of the output of others. For example, using the organisation's performance improvement processes, assists individuals to assess the quality and quantity of their output and to devise appropriate improvement plans
- demonstrate understanding of a broad knowledge base incorporating some theoretical concepts. For example, understands the principles and techniques underpinning the development of Key Performance indicators
- perform varied activities in a wide range of routine and/or non-routine contexts, with knowledge and skill depth in some areas. For example, negotiates the services to be provided to an external customer who has needs which are not able to be met within the organisation's standard range of services
- apply solutions to a defined range of unpredictable problems. For example, given the failure of a supplier to provide urgently required computer software, analyses the options and takes appropriate action for a prompt and cost-effective rectification of the problem
- identify, analyse and evaluate information from a variety of sources. For example, given feedback from several employees as to ways to up-grade the department's operating procedures and given the organisation's standard documentation, considers the information provided and prepares a recommendation for consultation

**Frontline management at this level normally operate in a relatively simple and routine workplace environment in which they use the organisation's:**

- goals, objectives, plans, systems and processes
- quality and continuous improvement processes and standards
- access and equity principles and practice
- business and performance plans
- defined resource parameters
- ethical standards

**The manager may:**

- adopt a variety of roles in teams including leader, facilitator, participant, coach, mentor

**Teams may be:**

- one or a mixture of on-going, work-based, project-based, task specific, or cross-functional. Teams may include full time employees, contractors, part time employees

**The organisation's goals, plans and objectives refers to:**

- those relevant to frontline management's work activities and to the teams in which frontline management is involved

- Competencies refer to:**
- the abilities of the team members and may be formally recognised or not formally recognised. They may be industry-wide, enterprise specific or individual specific
- Knowledge and skill development may:**
- take place through a variety of methods including for example, coaching, mentoring, exchange/rotation, shadowing, action learning, structured training programs
- OHS considerations may include:**
- implement and monitor participative arrangements
  - information to team about OHS and the organisation's OHS policies, procedures and practices

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

- Critical Aspects of Evidence**
- Provides leadership to team
  - Contributes positively to team performance
  - Provides coaching and mentoring support
- Underpinning Knowledge**
- Underpinning knowledge relates to the essential knowledge and understanding a person needs to perform work to the required standard
  - Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
  - The principles and techniques associated with:
    - the organisation of teams
    - team goal setting
    - devolving responsibility/accountability to teams
    - team dynamics
    - conflict resolution
    - gaining team commitment
    - monitoring and assessing team performance
  - Gain team commitment to the organisation's goals, values and plans
  - The forms of bias/discrimination and how to deal with them

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Functional literacy skills to access and use workplace information
- Assessing the competence of the team
- Facilitating the participation of team members
- Working effectively with team members who have diverse work styles, aspirations, cultures and perspectives
- Facilitating team development and improvement
- Assessing competency development requirements
- Gaining the trust and confidence of colleagues
- Dealing with people openly and fairly
- Using coaching and mentoring skills to provide support to colleagues
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

- The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

- In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competencies Levels at the end of this unit

**BSBFLM405A****Unit Descriptor****Implement operational plan**

This unit is equivalent to the original unit BSXFMI405A Manage operations to achieve planned outcomes.

Frontline management is actively engaged in planning, implementing, monitoring and recording performance to achieve the business plans of the team/organisation. This key role is carried out to provide safe, efficient and effective products and services to customer satisfaction within the organisation's productivity and profitability plans. At this level, work will normally be carried out within routine and non-routine methods and procedures which require the exercise of some discretion and judgement.

Consider co-assessment with BSBFLM402A Show leadership in the workplace, BSBFLM403A Manage effective workplace relationships, BSBFLM404A Lead work teams, BSBFLM406A Implement workplace information system, BSBCMN411A Monitor a safe workplace, and BSBFLM409A Implement continuous improvement.

**Unit Sector**

No Sector Assigned

**ELEMENT****PERFORMANCE CRITERIA**

- |                                    |  |
|------------------------------------|--|
| 1. Plan resource use               | <p>1.1 <i>Resource</i> information for use in <i>operational plans</i> is collected, analysed and organised in consultation with <i>colleagues and specialist resource managers</i></p> <p>1.2 Operational plans contribute to the achievement of the organisation's performance/business plan</p> <p>1.3 Key performance indicators are developed within operational plans</p> <p>1.4 Contingency plans are prepared in the event that initial plans need to be varied</p>  |
| 2. Acquire resources               | <p>2.1 Employees are recruited and/or inducted within the organisation's human resource management policies and practices</p> <p>2.2 Physical resources and services are acquired within the <i>organisation's policies, practices and procedures</i></p>  |
| 3. Monitor operational performance | <p>3.1 Performance systems and processes are monitored to assess progress in achieving profit/productivity plans and targets</p> <p>3.2 Budget and actual financial information is analysed and interpreted to monitor profit/productivity performance</p> <p>3.3 Unsatisfactory performance is identified and prompt action is taken to rectify the situation</p> <p>3.4 Mentoring and coaching is provided to support individuals/teams use resources to the required standard</p> <p>3.5 Recommendations for variation to operational plans are negotiated and approved by the <i>designated persons/groups</i></p> <p>3.6 Systems, procedures and records associated with documenting performance are managed in accordance with the organisation's requirements</p> |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to share information with members of work team	2
Collecting analysing and organising information	to acquire information for planning	2
Planning and organising activities	to plan resource usage	2
Working with others and in teams	to achieve planning outcomes	2
Using mathematical ideas and techniques	to carry out calculations associated with resource usage	1
Solving problems	to attend to unsatisfactory performance	2
Using technology	to assist the management of information	2

Three levels of performance denote level of competency required to perform a task.

1. Perform 2. Administer 3. Design

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**At AQF level 4, frontline management will normally be engaged in a workplace context where they:**

- engage in short to medium term planning within the organisation's business plans. For example, prepares six monthly plan of the department's productivity targets within the organisation's business plans
- take responsibility for own outputs in relation to specific quality standards. For example, assesses own management performance against the organisation's standards of management
- take limited responsibility for the quality and quantity of the output of others. For example, using the organisation's performance improvement processes, assists individuals to assess the quality and quantity of their output and to devise appropriate improvement plans
- demonstrate understanding of a broad knowledge base incorporating some theoretical concepts. For example, understands the principles and techniques underpinning the development of Key Performance indicators
- perform varied activities in a wide range of routine and/or non-routine contexts, with knowledge and skill depth in some areas. For example, negotiates the services to be provided to an external customer who has needs which are not able to be met within the organisation's standard range of services
- apply solutions to a defined range of unpredictable problems. For example, given the failure of a supplier to provide urgently required computer software, analyses the options and takes appropriate action for a prompt and cost-effective rectification of the problem
- identify, analyse and evaluate information from a variety of sources. For example, given feedback from several employees as to ways to up-grade the department's operating procedures and given the organisation's standard documentation, considers the information provided and prepares a recommendation for consultation

**Frontline management at this level normally operate in a relatively simple and routine workplace environment in which they use the organisation's:**

- goals, objectives, plans, systems and processes
- quality and continuous improvement processes and standards
- access and equity principles and practice
- business and performance plans
- defined resource parameters
- ethical standards

**Resources may include:**

- people, power/energy, information, finance, buildings/facilities, equipment, technology, time

**Operational plans are:**

- the short to medium term plans developed by the department/section to describe product/service performance

**The organisation's goals, plans and objectives refers to:**

- those which govern the acquisition of resources, for example, the purchase of equipment

- Colleagues and specialist resource managers may include:**
- people at the same level or more senior managers, and may include people from a wide range of social, cultural and ethnic backgrounds. This will usually be from a wider spread of the organisation than at AQF level 3
- Designated persons/groups may include:**
- those who have the authority to make decisions and/or recommendations about varying operations
- OHS considerations may include:**
- provision of information about OHS and the organisation's OHS policies, procedures and programs
  - employee induction
  - key performance indicators include OHS
  - systems, procedures and records
  - organisation's procedures for dealing with hazardous events

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

- Critical Aspects of Evidence**
- Produces short term plans for department/section
  - Plans, acquires and uses resources
  - Monitors and adjusts operational performance
  - Reports performance
- Underpinning Knowledge**
- Underpinning knowledge relates to the essential knowledge and understanding a person needs to perform work to the required standard

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

- Underpinning Skills**
- Functional literacy skills to access and use workplace information
  - Maintaining a safe workplace and environment
  - Accessing and using feedback to improve operational performance
  - Preparing recommendations to improve operations
  - Accessing and using established systems and processes
  - Using coaching and mentoring skills to provide support to colleagues
  - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- Resource Implications**
- The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

- In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competencies Levels at the end of this unit



**BSBFLM505A****Unit Descriptor****Manage operational plan**

This unit is equivalent to the original unit BSXFMI505A Manage operations to achieve planned outcomes.

Frontline management is actively engaged in planning, implementing, monitoring and recording performance to achieve the business plans of the team/organisation. This key role is carried out to provide safe, efficient and effective products and services to customer satisfaction within the organisation's productivity and profitability plans. At this level, work will normally be carried out within complex and diverse methods and procedures which require the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies.

This unit is imported from a primary training package and is being used in a floristry context.

Consider co-assessment with BSBFLM502A Provide leadership in the workplace, BSBFLM503A Establish effective workplace relationships, BSBFLM504A Facilitate work teams, BSBFLM506A Manage workplace information system, BSBMGT505A Ensure a safe workplace, and BSBFLM509A Promote continuous improvement.

**Unit Sector**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |                      |  |
|----------------------|--|
| 1. Plan resource use | <ul style="list-style-type: none"> <li>1.1 Resource information for use in operational plans is collected, analysed and organised in consultation with colleagues and specialist resource managers</li> <li>1.2 Resource information for use in operational plans is collected, analysed and organised in consultation with colleagues and specialist resource managers</li> <li>1.3 Operational plans contribute to the achievement of the organisation's performance/business plan</li> <li>1.4 Key performance indicators are developed within operational plans</li> <li>1.5 Contingency plans are prepared in the event that initial plans need to be varied</li> </ul> |
| 2. Acquire resources | <ul style="list-style-type: none"> <li>2.1 Employees are recruited and/or inducted within the organisation's human resource management policies and practices</li> <li>2.2 Physical resources and services are acquired within the organisation's policies, practices and procedures</li> </ul>  |

3. Monitor operational performance
- 3.1 Performance systems and processes are monitored to assess progress in achieving profit/productivity plans and targets
  - 3.2 Budget and actual financial information is analysed and interpreted to monitor profit/productivity performance
  - 3.3 Unsatisfactory performance is identified and prompt action is taken to rectify the situation
  - 3.4 Mentoring and coaching is provided to support individuals/teams use resources to the required standard
  - 3.5 Recommendations for variation to operational plans are negotiated and approved by the designated persons/groups
  - 3.6 Systems, procedures and records associated with documenting performance are managed in accordance with the organisation's requirements

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to share information with members of work team	2
Collecting analysing and organising information	to acquire information for planning	2
Planning and organising activities	to plan resource usage	3
Working with others and in teams	to achieve planning outcomes	3
Using mathematical ideas and techniques	to carry out calculations associated with resource usage	2
Solving problems	to attend to unsatisfactory performance	2
Using technology	to assist the management of information	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**At AQF level 5, frontline management will normally be engaged in a workplace context where they:**

- engage in tactical and operational planning within the organisation's strategic plans. For example, prepares an annual tactical plan for a department
- take responsibility for own outputs in relation to broad quantity and quality parameters. For example, evaluates own annual performance against personal work plans and the organisation's standards
- take limited responsibility for the achievement of group outcomes. For example, reviews group performance against plans and prepares in consultation with the group a performance improvement strategy
- demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas. For example, understands in depth the principles and techniques of performance management
- transfer and apply theoretical concepts and/or technical or creative skills to a range of situations. For example, researches, negotiates and establishes protocols for customer service for the department
- analyse and plan approaches to technical problems or management requirements. For example, given the work team's inability to achieve planned outcomes/outputs, analyses the team's performance and develops strategies with the team to rectify the situation
- evaluate information using it to forecast for planning or research purposes. For example, the organisation's goals and strategic and tactical plans are analysed in preparation for the preparation of the department's annual operational plan

**Frontline management at this level normally operate in a relatively diverse and complex workplace environment in which they use the organisation's:**

- goals, objectives, plans, systems and processes
- quality and continuous improvement processes and standards
- access and equity principles and practice
- business and performance plans
- resources, which may be subject to negotiation
- ethical standards

**They may use legislation, codes and national standards relevant to the workplace including:**

- award and enterprise agreements
- commonwealth and state/territory legislative requirements especially in regard to Occupational Health and Safety
- industry codes of practice

**Resources may include:**

people, power/energy, information, finance, buildings/facilities, equipment, technology, time

**Operational plans are:**

the tactical/operational plans developed by the department/section to detail product/service performance

**The organisation's policies, practices and procedures are:**

those which govern the acquisition of resources, for example, the purchase of equipment

<b>Colleagues and specialist resource managers may include:</b>	people at the same level or more senior managers, and may include people from a wide range of social, cultural and ethnic backgrounds. This will usually be from a wider spread of the organisation than at AQF level 4
<b>Designated persons/groups may include:</b>	those who have the authority to make decisions and/or recommendations about varying operations
<b>OHS considerations may include:</b>	<ul style="list-style-type: none"> <li>• provision of information about OHS and the organisation's OHS policies, procedures and programs</li> <li>• employee induction</li> <li>• key performance indicators include OHS</li> <li>• systems, procedures and records</li> <li>• organisation's procedures for dealing with hazardous events</li> </ul>

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

<b>Critical Aspects of Evidence</b>	<ul style="list-style-type: none"> <li>• Produces short term plans for department/section</li> <li>• Plans, acquires and uses resources</li> <li>• Monitors and adjusts operational performance</li> <li>• Reports performance</li> </ul>
<b>Underpinning Knowledge</b>	<p>Underpinning knowledge relates to the essential knowledge and understanding a person needs to perform work to the required standard</p> <ul style="list-style-type: none"> <li>• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination</li> <li>• The principles and techniques of: <ul style="list-style-type: none"> <li>• planning operations</li> <li>• resource planning</li> <li>• resource management systems</li> <li>• budgeting and financial analysis and interpretation</li> <li>• monitoring performance</li> <li>• reporting performance</li> <li>• problem identification and resolution</li> </ul> </li> <li>• Alternative approaches to improving resource usage and eliminating resource inefficiencies and waste</li> <li>• Ways of supporting individuals/teams who have difficulty in performing to the required standard</li> </ul>

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Functional literacy skills to access and use workplace information
- Maintaining a safe workplace and environment
- Accessing and using feedback to improve operational performance
- Preparing recommendations to improve operations
- Accessing and using established systems and processes
- Using coaching and mentoring skills to provide support to colleagues
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competencies Levels at the end of this unit

**BSBMGT502A****Unit Descriptor****Manage people performance**

This unit covers the ability of managers to manage the performance of the staff who report to them directly. Development of key result areas and key performance indicators and standards, coupled with regular and timely coaching and feedback, provide the basis for performance management. It is a unit that all managers/prospective managers who have responsibility for other employees should strongly consider undertaking.

Consider co-assessment with BSBMGT604A Manage business operations.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |                       |  |
|-----------------------|--|
| 1. Allocate work      | <ul style="list-style-type: none"> <li>1.1 Relevant groups and individuals are consulted on work to be allocated and resources to be deployed</li> <li>1.2 Work is allocated in accordance with operational plans</li> <li>1.3 Allocation of work is cost effective and appropriate in terms of the use of internal/external labour</li> <li>1.4 <i>Performance standards, Code of Conduct</i> and work outputs and processes are confirmed prior to commencement</li> <li>1.5 <i>Performance indicators</i> are developed for key result areas and are agreed prior to commencement of work</li> <li>1.6 <i>Risk analyses</i> are undertaken in accordance with the organisational risk management plan and legal requirements</li> </ul> |
| 2. Assess performance | <ul style="list-style-type: none"> <li>2.1 <i>Performance management</i> and review processes are designed to be consistent with organisational objectives and policies</li> <li>2.2 Participants in the performance management and review process are trained</li> <li>2.3 <i>Performance management</i> processes are implemented in accordance with planning and timelines</li> <li>2.4 Performance is monitored and evaluated on a continuous basis</li> </ul>   |
| 3. Provide feedback   | <ul style="list-style-type: none"> <li>3.1 Informal feedback is given in a regular, timely manner</li> <li>3.2 Poor performance is identified promptly and brought to the attention of the appropriate person</li> <li>3.3 On-the-job coaching is provided when necessary, both to improve performance and confirm <i>excellence in performance</i></li> <li>3.4 Documentation of performance is in accordance with the performance management system</li> <li>3.5 Formal structured feedback sessions occur as necessary and in accordance with organisational policy</li> </ul>  |

4. Manage follow-up
- 4.1 Performance improvement and development plans are developed in accordance with organisational policies
  - 4.2 Assistance is sought from human resource specialists where appropriate
  - 4.3 *Excellence in performance* is reinforced through recognition and continuous feedback
  - 4.4 Individuals not meeting expectations are provided with the necessary *coaching* and re-training and monitored closely
  - 4.5 Support services are provided to meet individual needs and circumstances
  - 4.6 Individuals who continue to perform below expectations are counselled and, where necessary, placed within the disciplinary process
  - 4.7 *Terminations* occur where serious misconduct or on-going under-performance occurs
  - 4.8 *Terminations* are in accordance with organisational and legal requirements
  - 4.9 Performance feedback systems are evaluated regularly and revised as necessary
  - 4.10 Selection, induction and training systems are evaluated regularly and improved

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to ensure that expectations are clearly understood	3
Collecting analysing and organising information	to provide feedback	3
Planning and organising activities	to undertake risk analysis	3
Working with others and in teams	to assess performance	3
Using mathematical ideas and techniques	to measure performance	2
Solving problems	to facilitate improvement where under-performance occurs	3
Using technology	to support the performance management systems	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Key result areas means:**

- those areas of business performance which are critical to the overall success of the business (or section of a business)

**Key performance indicators means:**

- those measures developed to gauge performance outcomes against targets

**Performance standards means:**

- the level of performance sought of an individual or group which may be expressed either quantitatively or qualitatively

**Code of Conduct means:**

- an agreed (or decreed) set of rules relating to employee behaviour/conduct with other employees or customers

**Risk analysis means:**

- a determination of the likelihood of a negative event preventing the organisation meeting its objectives and the likely consequences of such an event on organisational performance

**Performance management means:**

- a process or set of processes for establishing a shared understanding of what an individual or group is to achieve, and managing and developing individuals in a way which increases the probability it will be achieved in both the short and longer term
- in accordance with relevant industrial agreements

**Excellence in performance means:**

- regularly and consistently exceeding the performance targets established whilst meeting the organisation's performance standards

**Coaching refers to:**

- informal on-the-job and off-the-job advice and training to improve performance

**Termination means:**

- a cessation of the contract of employment between an employer and an employee, at the initiative of the employer within relevant industrial agreements



**Relevant groups and individuals include:**

- employees, employee representatives, employer representatives, line managers and human resource personnel

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Direct evidence of the performance management processes being undertaken is essential in the assessment of this unit, including the linking of performance indicators to the allocation of work and assessment of performance against performance standards
- Workplace coaching (informal feedback) coupled with formal performance feedback, resulting in performance improvement

**OHS considerations may include:**

- establishment and maintenance of OHS training, records, induction processes
- performance against OHS legislation and organisation's OHS system, especially policies, procedures and work instructions

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Relevant awards and certified agreements
- Performance measurement systems utilised within the organisation
- Key result areas of the organisation
- Human resource specialist assistance available
- Organisational plans and objectives (strategic, tactical and operational)
- Human resource planning
- All legislation relevant to the organisation which impacts on people performance (including EEO and anti discrimination laws)
- Organisational support services for employees (external and internal)
- Unfair dismissal rules and due process
- Staff development strategies

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Performance measurement skills to develop and manage key performance indicators
- Risk management skills to analyse, identify and develop mitigation strategies for identified risks
- Coaching and training skills to remediate any under-performance present in the work group or individuals
- Counselling/interviewing skills to conduct formal performance feedback sessions including counselling and disciplinary interviews where required
- Evaluative skills to review and improve performance management systems
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT503A****Unit Descriptor****Prepare budgets and financial plans**

This unit covers the preparation of financial plans and budgets by operational/non-financial managers, as required by their particular organisation.

This unit is related to BSBMGT504A Manage budgets and financial plans.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Analyse strategic and operational plans                       | 1.1 <i>Strategic opportunities</i> are expressed in terms of tactical and operational objectives<br>1.2 Tactical and operational objectives are converted into special projects or work programs<br>1.3 Financial trends are analysed and interpreted in the context of the organisational strategic objectives<br>1.4 Financial planning objectives, process timeframes and resources are clearly identified  |
| 2. Develop revenue, expenditure and capital investment proposals | 2.1 Individuals and groups are given responsibility for the development of specific <i>budgets and plans</i><br>2.2 Consultation occurs with all <i>relevant groups and individuals</i> throughout the organisation<br>2.3 Proposals are developed taking account of past experience, present trends and future expectations<br>2.4 Outcomes of proposals are clearly linked to organisational strategic objectives<br>2.5 Realistic cost benefit and risk analyses/management plans are incorporated into all proposals<br>2.6 Organisational <i>investment target rates</i> are met for <i>capital expenditure</i> proposals<br>2.7 Performance measures and tactics for monitoring and control processes are identified for each proposal/action<br>2.8 Proposals comply with the organisation's <i>values, policies, Code of Conduct, legal and ethical obligations</i><br>2.9 Proposals are developed within the agreed timeframes<br>2.10 <i>Supporting evidence</i> is valid and sufficient to allow proper evaluation of the proposals |

3. Build agreement for budgets and financial plans
- 3.1 Negotiation is undertaken with relevant groups and individuals in ways that build commitment to the plans
  - 3.2 Links to the achievement of organisational strategic objectives are identified and agreed
  - 3.3 Outcomes are confirmed in terms of clear, concise objectives and timeframes
  - 3.4 Negotiations lead to a clear agreement of those matters to be incorporated into *budgets and plans*
  - 3.5 *Budgets and plans* incorporate the outcomes of negotiations and meet organisation's approval processes
  - 3.6 *Delegations, accountabilities and responsibilities* are agreed and confirmed in writing
  - 3.7 Final *budget and plans* are clearly documented and a communication plan developed

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to develop a communication plan for the budget	3
Collecting analysing and organising information	to support budget proposals	3
Planning and organising activities	to develop budgets	3
Working with others and in teams	to ensure appropriate groups and individuals participate in the process	3
Using mathematical ideas and techniques	to build the budget and other financial plans	2
Solving problems	to successfully negotiate commitment to the plans	3
Using technology	to assemble the plans and communicate them to users of the plans	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Strategic opportunities may include:**

- new product/service development
- new models/revisions of products/services
- expansion/contraction of operational activities
- alliances/joint ventures
- outsourcing/in-sourcing

**Budgets and plans may include:**

- operation/production budgets
- financial budgets
- sales budgets
- capital expenditure budgets
- cash flow plans

**Relevant groups and individuals means:**

- all personnel within the organisation affected by the budgets and financial plans being developed

**Investment target rates refers to:**

- the minimum percentage rate of return required by the organisation for a capital investment project to proceed

**Capital expenditure means:**

- those components of the budget which, for internal policy reasons, are considered to provide benefits over more than one financial period and are to be evaluated as capital expenditure projects

**Legal and ethical obligations means:**

- compliance with all relevant statutes, regulations and audit requirements of the organisation, along with the organisation's policies and values

**Supporting evidence may include:**

- cost/benefit analyses
- risk management plans
- market research results
- net present value
- interest rate of return
- pay pack calculations

**Delegations means:**

- the decision-making accountabilities relating to the person's position description and/or other written and verbal delegations

**Accountabilities and responsibilities means:**

- clarification of who is to be accountable for a decision or action prior to its execution, and identification of groups, individuals and activities for which a person is responsible for managing

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Each of the elements needs to be clearly evidenced, both in terms of outcome and process, but this can be achieved through a holistic project approach to assessment
- Evidence needs to determine that people not only have done and can do what is required, but that they understand why these activities need to be undertaken
- Evidence of preparation and negotiation of proposed with clear links to strategic and operational plans

### OHS considerations may include:

- sufficient resources for OHS in strategic and operational plans
- proposals include OHS risk assessment and control
- proposals meet OHS legislative requirements and address organisational OHS objectives

### Underpinning Knowledge

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Financial planning within the organisation
- Budgeting
- Organisation's objectives and plans (strategic, tactical and operational)
- Consultative methods and processes
- Capital investment evaluation techniques
- Performance measurement
- Organisation roles in respect to financial delegations, accountabilities and responsibilities
- Standards for organisational record-keeping and audit requirements

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Analytical skills to analyse and interpret relevant financial information
- Financial planning skills to develop formal estimates of reviews, costs, cash flows and logistic requirements
- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Cost and benefit analysis skills to produce balanced arguments to support financial proposals
- Risk management skills to assess probability and consequences of any potential negative event
- Investment analysis skills to evaluate capital expenditure proposals (NPV, IROR, etc)
- Negotiation skills to negotiate agreement on budgets and financial plans with the relevant managers
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT504A****Unit Descriptor****Manage budgets and financial plans**

This unit covers all of the significant aspects of financial management for operational managers who are not financial specialists. It emphasises the preparation of users of budgets/financial plans through communication and training and consistent surveillance over budget performance, with early intervention where required.

Consider co-assessment with BSBMGT503A Prepare budgets and financial plans.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Communicate budget and financial plans       | 1.1 Budget/financial plan communication package reviewed by finance specialists<br>1.2 Package is amended/revised where appropriate<br>1.3 <i>Training activities</i> are undertaken with users of the budget and plans across the organisation<br>1.4 All data and terms are defined and understood by the users of the plans<br>1.5 Communication outcomes are tested to ensure clear understanding of objectives, processes and accountabilities  |
| 2. Monitor and control activities against plans | 2.1 <i>Delegations and budget accountabilities</i> are confirmed in writing prior to budget period<br>2.2 Funds are allocated in accordance with budget objectives and parameters<br>2.3 Recording systems and documentation meet all <i>audit requirements</i> and legal obligations<br>2.4 <i>Risk management</i> plans are implemented and contingency plans in place for all financial plans<br>2.5 Performance is monitored and variances identified on a <i>real time</i> basis<br>2.6 Variances are analysed in conjunction with relevant experts to determine cause and effect<br>2.7 Remedial action is taken swiftly to minimise negative impact and maximise benefits<br>2.8 Budgets and plans are renegotiated/restructured where necessary to optimise organisational performance |
| 3. Report outcomes of financial plans           | 3.1 Records of financial performance are properly maintained within organisational systems<br>3.2 Financial performance is analysed and reported in a form and language appropriate to the audience<br>3.3 <i>Non financial objectives</i> are reported in the context of overall organisational performance<br>3.4 Strategies and plans are reviewed and updated to optimise organisational performance   |



## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to ensure the budget and its impact on people is understood	3
Collecting analysing and organising information	to monitor budget performance	3
Planning and organising activities	to train users in the elements of the budget which affect them	3
Working with others and in teams	to review budget performance	3
Using mathematical ideas and techniques	to measure budget performance, calculate variances and present outcomes	2
Solving problems	to maintain operations within budget	3
Using technology	to manage budget performance and develop performance reports	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Training activities may include:

- small group discussions
- informal meetings
- formal, structured competency standards/training
- tele and video conferencing
- e-learning

### Delegations and budget accountabilities may include:

- monitoring expenditure
- authorising expenditure within limits
- reporting on variances to budget/plan
- taking remedial action within budget authority

### Audit requirements refer to:

- the internal standards required in the management of budgets and financial plans, approved by external/internal auditors

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Real time refers to:**

- on-line, instantaneous monitoring of performance/activities

**Appropriate non financial objectives may include:**

- environmental
- OHS
- quality
- market share
- customer service
- security or any other key result area

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence must cover all aspects of business operations in which financial management and decision-making occurs. Period activities relating to revenue expenditure and cash flow management, as well as capital expenditure proposals and capital budgeting, must be incorporated into the assessment
- The role of the operational manager as a communicator and trainer in respect to the implementation of the budget needs, also must be integrated into the overall assessment, along with regular and quality reporting of budget performance
- Evidence of analysis of budget performance and follow up action

**OHS considerations may include:**

- establishment and maintenance of OHS records
- assessment of OHS performance in financial and non-financial terms

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Financial planning within the organisation
- Budgeting
- Organisation's objectives and plans (strategic, tactical and operational)
- Consultative methods and processes
- Capital investment evaluation techniques
- Performance measurement
- Organisation roles in respect to financial delegations, accountabilities and responsibilities
- Standards for organisational record-keeping and audit requirements

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Financial planning skills to develop formal estimates of reviews, costs, cash flows and logistic requirements
- Communication and training skills to ensure team members and other managers understand the budget/financial planning objectives and processes
- Risk management skills to assess probability and consequences of any potential negative event
- Analysis skills to interpret positive and negative variances from budget/plan, determine the reasons therefore, and identify potential actions to remediate the situation
- Systems management skills to ensure financial performance records are collected, maintained and properly reported
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT506A****Unit Descriptor****Recruit, select and induct staff**

This unit covers all aspects of selection and recruitment relevant to managers who are not specialists in the area. It ensures that managers engage in appropriate planning and that selection and induction leads to the recruitment and retention of high quality staff. This unit is almost essential for those who now have (or are likely to have) an involvement in or responsibility for recruiting, selecting and/or inducting staff.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |                                    |   |
|------------------------------------|---|
| 1. Determine future people needs   | <ul style="list-style-type: none"> <li>1.1 Planning for future people requirements is consistent with strategic and operational plans</li> <li>1.2 Consultation occurs with all appropriate managers and sections</li> <li>1.3 <i>Position descriptions, person specifications</i> and criteria for selection are developed and approved</li> <li>1.4 <i>Position descriptions</i> and <i>person specifications</i> comply with all <i>organisational and legal requirements</i></li> </ul> |
| 2. Select appropriate people       | <ul style="list-style-type: none"> <li>2.1 Persons involved in assessment/selection process are appropriate for the position</li> <li>2.2 Candidates are assessed against <i>pre-agreed selection criteria</i></li> <li>2.3 Selection decisions are based on <i>performance based selection techniques</i> and direct evidence</li> <li>2.4 Candidates all receive feedback through the process</li> <li>2.5 Record-keeping complies with organisational and legal requirements</li> </ul>  |
| 3. Confirm employment arrangements | <ul style="list-style-type: none"> <li>3.1 Inform relevant people of the selection decision and prepare development plan based on selection process</li> <li>3.2 <i>Conditions of employment</i> as approved for the position are agreed with the successful candidate</li> <li>3.3 Induction arrangements are agreed with the candidate and other relevant managers</li> <li>3.4 Induction is undertaken in accordance with the induction plan and a training plan developed</li> </ul>    |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to ensure the candidates fit the organisation	3
Collecting analysing and organising information	to prepare for the selection interviews/activities	3
Planning and organising activities	to ensure the selection processes go smoothly	3
Working with others and in teams	to take advice from Human Resource specialists where appropriate	3
Using mathematical ideas and techniques	to calculate weightings/score an interview	1
Solving problems	to determine short-listing of suitable candidates	3
Using technology	to help select candidates on a competence/performance based assessment	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Position description refers to:**

- a written statement of the duties, tasks and responsibilities for a particular job or position

**Person specification refers to:**

- a written statement of the skills, knowledge, attitude, aptitudes and experience required for a particular job or position

**Organisational and legal requirements means:**

- compliance with all relevant statutes, regulations and audit requirements of the organisation, along with the organisation's policies and values

**Pre-agreed selection criteria may include:**

- educational qualifications
- statutory qualifications/certificates
- competencies required (including interpersonal skills)
- potential for growth
- essential experience
- desirable experience
- ability to work in the particular environment

**Performance based selection techniques may include:**

- in-basket
- case studies
- scenarios
- simulations
- actual performance
- skills/knowledge testing
- an assessment centre (with some or all of the above)

**Conditions of employment may include:**

- salary/wages
- penalty rates
- holidays and leave entitlements
- superannuation
- hours of work
- grievance procedures

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- The evidence should clearly demonstrate that the required planning and preparatory processes have been undertaken
- It should also evidence actual interviewing and the use of performance based selection techniques
- Induction should be observed by the assessor to ensure the competence of the individual to follow an induction plan which is clearly established

**OHS considerations may include:**

- national, state/territory legislative requirements especially in regard to Occupational Health and Safety
- industry codes of practice

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Consultation processes and methods
- Succession planning/HR planning
- Organisation policies and procedures
- Legal requirements
- Performance based selection techniques
- Organisational requirements for record-keeping and documentation
- Award agreements, contracts of employment (including conditions)

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Developing position descriptors/person specifications for positions for which they are responsible
- Developing selection criteria
- Designing an appropriate competency based and performance based selection plan
- Induction/training skills to prepare direct reports for the safe and efficient performance of their job
- Interviewing skills to participate in selection interviews as required
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels earlier in this unit



**BSBMGT507A****Unit Descriptor****Manage environmental performance**

This unit covers the development, maintenance and evaluation of the organisation's environmental policies and procedures in regard to environmental sustainability as an integral part of business planning.

All those who have a management responsibility would be advised to take this unit. It is also very useful for small businesses.

This unit is related to BSBMGT505A Ensure a safe workplace, BSBMGT609A Manage risk and BSBMGT610A Manage environmental management systems.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Develop a business plan to enhance environmental performance | <p>1.1 A business plan is developed that reflects the organisation's <i>policies</i> and commitment to <i>environmental sustainability</i> as an integral part of business operations</p> <p>1.2 Procedures are developed to maximise/enhance integration of environment, finance, safety and other areas of impacts and opportunities</p> <p>1.3 Procedures are developed to <i>maximise environmental opportunities</i> and <i>minimise environmental impacts</i>, and <i>expert advice</i> is obtained as required</p> <p>1.4 Continuous improvement policies and practices <i>monitor</i> and <i>report</i> on the environmental performance of the organisation</p> <p>1.5 The organisation's activities and <i>products</i> are designed to minimize <i>life cycle impacts</i></p> <p>1.6 Financial and human resources for the operation of environmental systems are identified, sought and/or provided as required</p> <p>1.7 Changing trends and opportunities relevant to the organisation are identified, analysed and taken into account at the planning stage</p> |
| 2. Manage environmental impact and opportunity                  | <p>2.1 Identification and assessment of existing and potential environmental impacts and opportunities is conducted and advice is sought as required</p> <p>2.2 Procedures for ongoing management of environmental impacts and opportunities are developed and integrated with the organisation's policies and procedures</p> <p>2.3 <i>Environmental procedures</i> are addressed at the planning, design and evaluation stages of any change in the workplace to ensure that ongoing impacts and opportunities are identified</p> <p>2.4 Contingency plans are established to manage impacts and opportunities when long-term solutions are not readily available</p> <p>2.5 Ongoing training program is developed to identify and fulfil employees' environmental training needs</p>   |

- |   |   |
|---|---|
| 3. Promote innovation and opportunity   | 3.1 <i>Continuous improvement</i> and sustainable innovation are promoted as an essential part of doing business<br>3.2 Procedures are developed to analyse and communicate the costs and benefits of innovations and improvements<br>3.3 New ideas are actively sought and entrepreneurial behaviour is encouraged in employees, workplace committees and teams<br>3.4 Procedures are established to actively seek the support of the supply chain for implementing sustainable innovation and continuous improvement<br>3.5 Members of the <i>supply chain</i> are encouraged to meet high standards of environmental performance |
| 4. Manage system to record and report environmental impacts and opportunities | 4.1 System is managed to <i>record and report</i> environmental performance as an integral part of the organisation's record keeping and performance evaluation system<br>4.2 Patterns of environmental non-compliance are identified and addressed and opportunities for environmental management improvements are acted upon  |
| 5. Evaluate environmental performance   | 5.1 Processes are developed to ensure that ongoing evaluation of environmental performance, is part of the organisation's procedures  |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to promote environmental policies	3
Collecting analysing and organising information	to aid planning	3
Planning and organising activities	to develop environmental management strategies	3
Working with others and in teams	to control impacts, maximise opportunities and to gain support for management strategies	3
Using mathematical ideas and techniques	to aid planning	3
Solving problems	to develop management strategies and operational procedures	3
Using technology	to access and record information	3

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Knowledge of legislation, codes, national standards, industry codes of practice and workplace policies and procedures must:**

- be strictly relevant to the particular workplace and is not intended to include detailed technical aspects of environmental science and
- details of legislation must be directly relevant to the workplace
- be consistent with the concept that people at this level, will be dealing with environmental concepts as part of an overall management responsibility and not as an environmental specialist

**Environmental performance may be defined as:**

- a measure of an organisation's impact on the environment and of their ability to manage that impact

**Environmental policies must be**

- relevant to organisation's operations and must be appropriate to the scope and scale of the business

**Environmental policies may address:**

- local, national and international innovations, programs and ideas
- triple bottom line principles i.e. the integration of environmental, commercial and social aspects of business operations
- concepts of business sustainability
- environmental load reduction and waste minimisation
- tenders for the provision of goods and services that specify environmentally preferred selection criteria (eg. use of paper packaging rather than plastic)
- protection of land and habitat and ecological considerations
- procedures for media releases as a result of incidents

**Environmental improvement plans may be established at management level and may include:**

- measuring, monitoring and recording environmental performance, and continually setting targets for measurable improvements
- all aspects of environmental performance including energy and other resource use, waste minimisation, recycling, transport use etc

**Environmental sustainability must be relevant to the organisation's operations and may include:**

- recognition of natural earth systems and how natural systems work

**Environmental sustainability may be affected by:**

- organisational culture and operations
- internal or external economic climate
- political climate
- market focus/considerations

**Business sustainability means:**

- A sustainable business in this sense is profitable and competitive in the foreseeable future. Effective management of environmental impacts and opportunities can contribute to business sustainability by reducing costs, differentiating goods and services and contributing to a better corporate image.

**Maximise opportunities to improve environmental performance can provide opportunities to improve business operations including increases in:**

- corporate image/citizenship
- staff morale
- cost reduction
- product differentiation/branding
- identification of market potential

**To minimise environmental impact, means to minimise the organisations negative effects on the environment including:**

- waste minimisation and recycling
- emissions/spills
- resource efficiency including water, energy
- alternative energy sources
- reduction in use of non-renewable resources

**Expert assistance and/or advice may be sought from:**

- internal or external sources/specialists
- consultants or other experts or specialists

**Monitor and report in this context means to maximise and continually seek to improve business performance by developing procedures which monitor and report on:**

- variances
- deficiencies
- improvements
- trends

**Products may include:**

- goods, including packaging
- services

**Life cycle impacts may include:**

- tendering and purchasing processes to include life cycle criteria
- product design and manufacture
- packaging policies
- product use
- product disposal
- vehicle policies that include use of cleaner fuels/alternative energy sources and regular servicing intervals to reduce pollution and improve efficiency

**Environmental procedures may include:**

- procedures that may have an influence on the organisation's environmental performance

**Environmental management training program should be:**

- integrated into the organisation's existing training arrangements

**Continuous improvement and innovation means:**

- consistently reviewing activities in search of a better way and improving the organisation in all aspects of its operation

**Supply chain may include:**

- suppliers
- contractors
- others acting on organisation's behalf
- supply should be identified as a key determinate of environmental performance

**Recording and reporting systems may include:**

- internal and external reporting requirements

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence will need to be provided of the ability to identify, plan, manage and promote environmental sustainability within the organisation and to contribute to the development of environmental management policies that minimise impacts and maximise opportunities within the organisation
- N.B. Particular note must be taken that evidence must be strictly relevant to the particular management role and is not intended to include detailed technical aspects of environmental science

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Required knowledge is to be limited to that which is sufficient to perform the particular management function and is intended to promote environmental awareness rather than technical environment competencies
- Relevant business planning concepts
- Environment sustainability as a " whole-system" approach
- Quality assurance procedures
- Strategies to maximise opportunities and minimise environment impact
- Relevant training and record keeping concepts
- Relevant knowledge of environmental issues especially in regard to water catchments, air, noise, ecosystems, habitat, waste minimisation
- Relevant knowledge of ecological systems in regard to business operation

At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Conflict management skills to mediate, negotiate and/or attempt to obtain consensus between parties
- Analysis skills to identify potential environmental and ecological impacts and opportunities in regard to business operation
- Problem solving skills to deal effectively with environmental impacts and opportunities as identified
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT601A****Unit Descriptor****Contribute to strategic direction**

This unit covers the manager's involvement in the establishment of the strategic direction of the organisation, to both sustain competitive advantage and enhance global competitiveness. It requires analysis and interpretation of relevant markets, capability assessment of the organisation and its existing and potential competitors and allies.

Consider co-assessment with BSBMGT602A Contribute to the development and implementation of strategic plans.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Contribute to the creation and/or review of the organisational mission statement | 1.1 Effective relationships are developed with <i>stakeholders</i> through consultation<br>1.2 Organisational direction and values are developed and agreed upon<br>1.3 Support is gained for strategic direction from all relevant <i>stakeholders</i>  |
| 2. Analyse the external environment   | 2.1 Information requirements are determined and <i>research</i> undertaken or commissioned to deliver relevant information<br>2.2 <i>Research</i> provides appropriate information to assist in the prediction of social, political, economic and technological developments in a <i>global context</i><br>2.3 <i>Advice</i> sought from appropriate experts wherever necessary<br>2.4 Emerging and predicted trends are analysed for business opportunities<br>2.5 Business opportunities and obstacles are documented and analysed<br>2.6 The analyses are based on valid, reliable information and the methodology is cost effective<br>2.7 Future activities and potential interests for the organisation and other relevant groups, are identified<br>2.8 Steps to influence, modify and adapt to the external environment are identified |
| 3. Undertake competitive analysis   | 3.1 Existing and potential competitors and allies are identified<br>3.2 Strengths and weaknesses of existing and potential competitors and allies are documented<br>3.3 Potential for joint ventures and/or strategic alliances is explored<br>3.4 Analytical methods are cost effective<br>3.5 Cases for co-operative ventures are supported by risk and cost/benefit analyses, are consistent with organisation mission and values, and provide for appropriate <i>due diligence</i><br>3.6 Evaluation of competitive environment takes account of current trends and developments   |



4. Analyse and review organisation's capabilities
- 4.1 Opportunities are provided for input to the analysis from people throughout the organisation
  - 4.2 Organisation's existing resources (tangible and intangible) are evaluated thoroughly
  - 4.3 Capabilities are identified and documented and ranked in terms of sustainable competitive advantage
  - 4.4 *Value chain analysis* is completed across the organisation and competitive advantages and disadvantages are identified
  - 4.5 *Core competencies* are identified and evaluated in terms of sustainable competitive advantage and global opportunities
  - 4.6 The mission, vision and purpose are consistent with the organisation's stated values, and are realistic but challenging

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to inform about the organisation's strategic direction	3
Collecting analysing and organising information	to conduct environmental analysis	3
Planning and organising activities	to undertake competitive analysis	3
Working with others and in teams	to conduct the analyses and documentation of the analyses	3
Using mathematical ideas and techniques	to analyse the performance of competitors and their own organisation	2
Solving problems	to manage threats from the external environment and competitors	3
Using technology	to undertake research and conduct analyses	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Competitive advantage means:

- the combination of factors within an organisation which gives it an edge over its competitors

**Stakeholders may include:**

- customers
- employees
- government agencies
- owners

**Research may include:**

- commissioned research
- internal research
- demographic
- social
- political
- economic
- technological
- product
- market segmentation

**Global context means:**

- an examination on a world-wide basis, of factors which may impact on the long-term strategic direction of the business

**Due diligence means:**

- the process by which an investor, lawyer, consistent auditor, or other qualified person, verifies the accuracy of data provided by another organisation

**Value chain analysis means:**

- an analysis of a series of primary activities:
  - inbound logistics
  - operations
  - outbound logistics
  - marketing and sales
  - service support
- and their support activities:
  - firm infrastructure
  - human resource management
  - technological development
  - procurement

**Core competencies means:**

- the resources and capabilities that serve as a source of competitive advantage over a firm's rivals

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Evidence needs to be provided of detailed, thorough and appropriate analyses in respect to the organisation's own capabilities, those of their existing potential competitors and allies, and the external environment
- Evidence of the development/restatement of organisations strategic direction based on these analysis to develop/restate their strategic direction in a clear and unequivocal manner, needs to be carefully assessed

### OHS Considerations may include:

- inclusion of OHS policy in mission statement
- review of external OHS requirements, including potential for OHS management systems and approaches related to worker's compensation premiums
- use of participative arrangements in OHS strategy

### Underpinning Knowledge

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Strategic planning methodologies
- Data collection methods
- Inventory management systems including material resource planning systems
- Value chain concepts
- Purpose, mission and values of the organisation
- External environment scanning relating to social, political, economic and technological developments
- Core competency concepts
- Concept of sustainable competitive advantage
- Consultative processes and methods
- Organisational change processes
- Organisational design processes
- Legislation, codes and by-laws relevant to the organisation's operations

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Research skills to ensure accurate, up-to-date information is available for the environmental analysis
- Analytical skills to undertake value chain analysis and identify under-performance/areas for improvement
- Evaluative skills to maintain performance and assess the use of alternative suppliers/contractors
- Ability to collate and interpret statistical data including trend analysis
- Value chain analysis to assess the value-creating potential of a firm's primary activities and support activities which are superior and/or unique to its competitors
- Risk management skills to plan and undertake appropriate due diligence
- Cost benefit analysis skills to evaluate co-operative ventures and alliances
- Strategic thinking skills to develop and evaluate responses to competitors and allies actions in the market
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT602A****Contribute to the development and implementation of strategic plans****Unit Descriptor**

This unit covers the second stage of the strategic planning process. It involves confirmation of strategic direction, the development of detailed objectives and strategies, and the creation of measures and criteria to evaluate progress towards those objectives.

Consider co-assessment with BSBMGT601A Contribute to strategic direction.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Confirm organisational mission, vision and purpose | <ul style="list-style-type: none"> <li>1.1 <i>Stakeholders</i> are consulted in an open and realistic way to engender support for the process</li> <li>1.2 Expectations and requirements of the board/owners are being met</li> <li>1.3 The mission, vision and purpose are consistent with the organisation's stated values, and are realistic but challenging</li> </ul>  |
| 2. Formulate strategic objectives and strategies      | <ul style="list-style-type: none"> <li>2.1 Objectives are consistent with the environmental trend analyses, and forecasts have been developed</li> <li>2.2 Objectives state clearly and in measurable terms, what the organisation needs to achieve</li> <li>2.3 <i>Strategies</i> are developed in the context of meeting chosen product differentiation and cost structure objectives</li> <li>2.4 <i>Value adding activities</i> are introduced, consistent with the <i>value chain analysis</i> and the strategic direction</li> <li>2.5 Strategies take account of competitive advantages and disadvantages identified</li> <li>2.6 Opportunities for <i>strategic alliances</i> and <i>co-operative ventures</i> are incorporated into the strategies</li> <li>2.7 <i>Benchmarking</i> of all key operational and support activities is undertaken</li> <li>2.8 Opportunities for the purchase of <i>value adding activities</i> externally have been thoroughly evaluated</li> </ul> |

3. Evaluate and improve strategic performance
- 3.1 *Processes for the evaluation* of strategic performance are supported by key stakeholders and approved by the board/owners
  - 3.2 *Key Performance Indicators* and other criteria for measurement of achievement are developed in advance of implementation
  - 3.3 Performance measures address all key aspects of organisational performance, to meet the interests of *stakeholders*
  - 3.4 Performance data is analysed on a regular and planned basis, in terms of the indicators, performance standards and other criteria developed
  - 3.5 Successes and performance gaps are clearly identified and analysed as to cause and effect
  - 3.6 Strategic performance is reported to all stakeholders in a transparent manner and meeting all *compliance requirements*
  - 3.7 Objectives and strategies are reviewed, evaluated and revised where necessary
  - 3.8 The organisation's mission, vision and purpose are reviewed and revised where necessary

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to explain and educate stakeholders about the strategic plans	3
Collecting analysing and organising information	to develop strategic plans	3
Planning and organising activities	to evaluate opportunities	3
Working with others and in teams	to evaluate the success of the organisation in meeting its strategic objectives	3
Using mathematical ideas and techniques	to analyse and report performance data	2
Solving problems	to rectify/remediate performance gaps which are identified	3
Using technology	to conduct value chain analysis	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Stakeholders may include:**

- customers
- employees
- government agencies
- owners

**Strategies means:**

- long term plans which will guide the organisation in achieving its mission

**Value chain analysis means:**

- an analysis of a series of primary activities:
  - inbound logistics
  - operations
  - outbound logistics
  - marketing and sales
  - service support
  - and their support activities:
    - firm infrastructure
    - human resource management
    - technological development
    - procurement

**Value adding activities may include:**

- outsourcing
- external supply
- contracting out

**Strategic alliances/co-operative ventures means:**

- any form of partnership, consortium, joint venture entered into to help better achieve strategic objectives

**Benchmarking means:**

- a process by which an organisation assesses its current best practices by comparing them with the best practices of other organisations

**Processes for evaluation  
may include:**

- key performance indicators
- gap analysis
- variance analysis
- conformance reports
- customer feedback
- balanced score card measures

**Key Performance  
Indicators means:**

- a series of measurements/targets for each of the key result areas of the organisation

**Compliance requirements  
may include:**

- acts/legislation
- regulations
- codes of conduct
- audit requirements
- internal policy requirements

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- There needs to be a demonstrated capacity to successfully consult and engage relevant stakeholders to support the strategic planning processes
- The link between the Performance Indicators, the strategies developed and the organisation's objectives, must be apparent
- Performance data needs to be accumulated, analysed and reported upon with recommendations for on-going improvement

**OHS considerations may  
include:**

- plans are consistent with OHS policy and objectives
- objectives and plans incorporate continuous improvement
- participative arrangements are used for evaluation of OHS performance
- OHS records are included in evaluation and development of performance indicators



**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Outsourcing/in-sourcing
- Value-adding concepts
- Performance measurement techniques
- Strategic planning methodologies
- Data collection methods
- Inventory management systems including material resource planning systems
- Value chain concepts
- Purpose, mission and values of the organisation
- External environment scanning relating to social, political, economic and technological developments
- Core competency concepts
- Concept of sustainable competitive advantage
- Consultative processes and methods
- Organisational change processes
- Organisational design processes
- Legislation, codes and by-laws relevant to the organisation's operations
- Risk management
- Benchmarking concepts and processes

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Communication skills to write and disseminate clear and measurable objectives and report outcomes to relevant groups and individuals
- Analytical skills to undertake value chain analysis and identify under-performance/areas for improvement
- Consultation skills to ensure all relevant groups and individuals understand and support the plans
- Evaluative skills to maintain performance and assess the use of alternative suppliers/contractors
- Strategic thinking skills to assess competitive advantage/disadvantage, and to identify and assess potential alliances and effective strategies
- Project management skills to undertake benchmarking activities
- Performance measurement skills to develop and manage key performance indicators
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT603A****Unit Descriptor****Review and develop business plans**

This unit covers those areas of business planning and system review undertaken by an operational manager and incorporates the development of various tactical and operational plans incorporating risk management plans.

Consider co-assessment with BSBMGT604A Manage business operations.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Develop tactical and operational plans | <ul style="list-style-type: none"> <li>1.1 Pre-existing <i>tactical and operational plans</i> have been reviewed and evaluated</li> <li>1.2 Strategic objectives are analysed, interpreted and relevant operational objectives are developed</li> <li>1.3 <i>Project management protocols</i> for the organisation are developed</li> <li>1.4 Consultation with appropriate groups and individuals is built into plans</li> <li>1.5 Requirements of internal/external customers are identified through consultation and documented</li> <li>1.6 Plans include methods for measuring customer satisfaction and obtaining feedback</li> <li>1.7 Operational performance objectives, measures and criteria are developed through consultation with relevant groups and individuals</li> <li>1.8 Tactical and operational plans identify financial, human and physical resource requirements</li> <li>1.9 Scheduling of activities meets customer/marketing requirements</li> <li>1.10 Plans contain clear profitability, productivity and performance targets for key result areas (e.g. OHS, environment, quality, customer service)</li> <li>1.11 Plans are concise, logical and comply with organisation requirements</li> <li>1.12 Plans address all relevant operational issues, including internal/external environmental factors</li> <li>1.13 <i>Tactical and operational plans</i> have been subject to risk assessment and analyses, and include <i>risk management plans</i></li> </ul> |
|---|---|

2. Review business systems
- 2.1 Reviews are undertaken regularly of the implementation of tactical and operational plans
  - 2.2 Information/reports are available to compare plans, budgets and forecasts to actual performance
  - 2.3 *Systems* are reviewed in consultation with users and people responsible for implementing the business plans
  - 2.4 *Systems* provide for identification of system variance or failure, to allow early intervention and prompt remediation
  - 2.5 *Systems* monitor resource usage in a timely manner
  - 2.6 *Systems* allow for flexible responses to changing and emerging situations
  - 2.7 *Systems* are in place to provide feedback to relevant groups and individuals on their performance
  - 2.8 *Systems* provide for immediate response to incidents involving potential risk to people, product or the environment
  - 2.9 *Systems* are designed to achieve the organisation's energy saving targets

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to internal/external customers and review systems	3
Collecting analysing and organising information	to prepare the tactical and operational plans	3
Planning and organising activities	to develop plans and review/redesign systems	3
Working with others and in teams	to consult with them and obtain their input into planning and system review activities	3
Using mathematical ideas and techniques	to ensure appropriate measurement activities are in place	2
Solving problems	to improve existing systems and achieve tactical/operational objectives	3
Using technology	to improve system's performance	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Tactical and operational plans means:**

- plans to fine-tune a strategy. It involves less organisational resources and is usually relatively easy to implement or reverse. They include the plans for specific tactical responses to the marketplace and the day-to-day plans associated with the production and delivery of a product or service

**Project management protocols means:**

- the rules of behaviour relating to the development, planning, approval, implementation, management and evaluation of projects

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Systems means:**

- a detailed description/depiction of how organisations relate to their environments and how they process information through strategic and tactical management to develop actual operating procedures

**Electronic commerce refers to:**

- business-to-business, business-to-consumer, government to business activities conducted via electronic communication methodologies and networks
- cost centre/department - to cost centre/department

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Assessment for this unit will need to occur over a sufficient period of time to allow an holistic assessment of the tactical and operational planning activities
- Plans developed must meet the organisation's criteria as well as those set down in the unit
- Systems review and revision is a crucial aspect of the business planning process and needs to be clearly evidenced

### OHS considerations may include:

- review and evaluation of previous OHS plans and programs
- implementation of OHS systems for projects
- use of participative arrangements for review of OHS in operational performance
- development and review of OHS performance targets
- framework and components of OHS management system, its structures and performance
- systemic review procedures

### Underpinning Knowledge

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Strategic planning
- All legislation relevant to the organisation's operation
- Critical path/PERT methodology
- Relevant industrial awards and agreements
- Electronic commerce systems
- Consultative methods and processes
- Performance measurement and benchmarking methodology
- Operations management
- High reliability organisational concepts
- Energy management
- Capital investment evaluative methodology including NPV and ROI

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Analytical skills to interpret strategic objectives and develop tactical and operational objectives
- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Risk management skills to analyse, identify and develop mitigation strategies for identified risks
- Systems analysis and design skills to ensure that system outputs meet tactical/operational objectives and measure performance in a timely way
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels earlier in this unit

**BSBMGT604A****Unit Descriptor****Manage business operations**

The unit covers those activities required of a manager running a business operation and links closely with the business planning units. The emphasis is on the implementation of plans and the monitoring and response to systems failures.

This unit is the implementation of the work done in BSBMGT603A Review and develop business plans; co-assessment should be strongly considered.

Consider co-assessment also with BSBMGT606A Manage customer focus and BSBMGT609A Manage risk.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Implement tactical and operational plans | <p>1.1 <i>Supply chains</i> of resources to organisation or department established and operating effectively</p> <p>1.2 Requirements for skilled labour are met in accordance with plans</p> <p>1.3 Activities are brought on line in accordance with scheduling requirements of plans</p> <p>1.4 <i>Preventative and breakdown maintenance arrangements</i> for business systems are integrated into operations</p> <p>1.5 Cost maintenance and control systems are implemented</p> <p>1.6 <i>Performance measurement systems</i> are tested and operational</p> <p>1.7 Projects are commenced consistent with the project management plan</p> <p>1.8 Co-ordination of people, resources and equipment provide <i>optimum results</i></p> <p>1.9 Products/services meet <i>quality</i> and functional specifications</p> <p>1.10 Communication/consultation is undertaken according to plans</p> <p>1.11 Implementation is consistent with business and strategic plans in place</p> |
| 2. Monitor performance                      | <p>2.1 Performance indicators and criteria for assessment are confirmed and in place</p> <p>2.2 Indicators/criteria are consistent with organisational objectives and planned outcomes</p> <p>2.3 Projects are managed in accordance with established <i>project management protocols</i></p> <p>2.4 <i>Timely</i> reports on all key aspects of the business are available and user-friendly, and balanced in terms of financial and non financial performance</p> <p>2.5 System failures, product failures and variances to plan are reported as they occur</p>   |



3. Respond to performance data
- 3.1 Relevant performance reports are identified and analysed in detail
  - 3.2 System specifications and protocols are reviewed to eliminate future failure
  - 3.3 Groups and individuals contributing to under-performance are *coached*, and training provided where appropriate
  - 3.4 System processes and work methods are regularly reviewed as part of continual improvement

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to ensure that all appropriate individuals understand the plans and systems	3
Collecting analysing and organising information	to ensure plans in place meet all quality requirements	3
Planning and organising activities	to review systems and processes to achieve continuous improvement	3
Working with others and in teams	to ensure that they are pro-active in the management of the operations	3
Using mathematical ideas and techniques	to analyse system/product failures	2
Solving problems	to eliminate any negative variances to the plan	3
Using technology	to improve system processes and work methods wherever appropriate	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Supply chains means:

- a network of facilities that procures raw materials, transforms them into intermediate products (or services) and then finished goods (or services), and delivers them through a distribution system. It spans procurement, production and distribution; views them not as discrete elements but interlinked

**Preventative and breakdown maintenance arrangements may include:**

- programmed maintenance
- preventative maintenance plans
- emergency response plans

**Performance measurement systems means:**

- those systems designed to collect quantitative and qualitative indicators of performance in all of the Key Result Areas for the organisation so as to identify and remediate variances to plans

**Optimum results means:**

- that the best overall mix of results is achieved across the organisation's Key Result Areas. Outcomes are measured within the applicable constraints

**Quality means:**

- meeting all quality assurance specifications of the organisation

**Project management protocols means:**

- the rules of behaviour relating to the development, planning, approval, implementation, management and evaluation of projects

**Timely means:**

- in accordance with time limits established in the operational planning process

**Coaching refers to:**

- informal on-the-job and off-the-job advice and training to improve performance

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- The evidence must cover the translation of the plans previously developed, into workable activities or projects
- There must be evidence of a systematic value chain analysis of all of the support activities of the business and the outcomes of that analysis being translated into action
- Evidence of risk management and evaluation of performance leading to effective remediation also needs to be present

**OHS considerations may include:**

- review of OHS records and performance management measures
- establishment and maintenance of OHS risk management approaches
- systemic use of hierarchy of control measures
- establishment and maintenance of OHS systems for project management

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Strategic planning
- All legislation relevant to the organisation's operation
- Critical path/PERT methodology
- Relevant industrial awards and agreements
- Electronic commerce systems
- Consultative methods and processes
- Performance measurement and benchmarking methodology
- Operations management
- High reliability organisational concepts
- Energy management
- Capital investment evaluative methodology including NPV and ROI

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Analytical and evaluative skills to assess supply chain performance
- Performance measurement skills to develop and manage key performance indicators
- Planning and co-ordination skills to ensure the people resources and equipment work in a functional manner to achieve optimum results
- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Project management skills to ensure project objectives, outcomes and outputs are delivered on time, within budget, and incident free
- Communication and report writing skills to keep all internal customers informed of activities and developments
- Systems analysis and design skills to ensure that system outputs meet tactical/operational objectives and measure performance in a timely way
- Coaching and training skills to remediate any under-performance present in the work group or individuals
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels earlier in this unit

**BSBMGT605A****Unit Descriptor****Provide leadership across the organisation**

This unit covers the demonstration of leadership behaviour and personal and professional competence necessary to manage at a senior level. It may relate equally to leadership of a small to medium sized organisation or a significant unit of activity in a large organisation.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Communicate organisational mission and goals | <ul style="list-style-type: none"> <li>1.1 Objectives, values and standards are clarified in accordance with organisation's strategic direction</li> <li>1.2 Linkages between organisational objectives, values and standards and the responsibilities of relevant groups and individuals are established</li> <li>1.3 Media and language used is appropriate to individuals and group circumstances</li> <li>1.4 Expectations of internal groups and individuals are clearly stated and explained in a manner which builds commitment to the organisation</li> <li>1.5 Community expectations of the organisation including product safety, OHS, environmental management and any other factors which could potentially impact on the community, are addressed</li> <li>1.6 <i>Incidents</i> are investigated promptly, and results clearly communicated to relevant groups and individuals</li> </ul>   |
| 2. Influence groups and individuals             | <ul style="list-style-type: none"> <li>2.1 Trust, confidence and respect of diverse groups and individuals, are built through positive role modelling and effective communication and consultation</li> <li>2.2 Organisational and workplace culture improvements are embraced, resourced and implemented effectively</li> <li>2.3 Understanding of the global environment and new technology is demonstrated in work activities</li> <li>2.4 Actions convey flexibility, adaptability to change and accessibility</li> <li>2.5 Consultation and participation in decision making occurs with relevant groups and individuals where appropriate</li> <li>2.6 Decision making takes into account needs and expectations of both internal and external groups</li> <li>2.7 Decision making occurs in accordance with <i>risk management</i> plans for all options, and within appropriate time frames</li> <li>2.8 Exemplary conduct and performance is demonstrated to build trust and support of both colleagues and those to whom you report</li> <li>2.9 Public relations strategy is in place to represent the organisation positively in the media and community</li> </ul> |

3. Build and support teams
- 3.1 *Accountabilities and responsibilities* are assigned to teams consistent with their competencies and operational plans
  - 3.2 Teams are resourced to allow them to achieve their objectives
  - 3.3 Teams and individuals are empowered through effective delegations and support for their initiatives
  - 3.4 *A positive work environment* is created and maintained
  - 3.5 Teams and individuals are encouraged to develop innovative approaches to the performance of work
4. Demonstrate personal and professional competence
- 4.1 Personal qualities and managerial performance are modelled consistent with the performance standards/Code of Conduct of the organisation
  - 4.2 Self control and self regulation are demonstrated at all times
  - 4.3 Appropriate interpersonal and leadership styles are adopted to meet particular circumstances and situations
  - 4.4 Personal objectives and work program outcomes are set and met
  - 4.5 New knowledge and technology is utilised to continuously improve business processes and product delivery
  - 4.6 Self performance and *professional competence* is continuously improved through engagement in a range of professional development activities
  - 4.7 Participation in industry/professional networks and groups occurs regularly
  - 4.8 Conflict issues and problems are managed through effective negotiations, to achieve optimum business outcomes
  - 4.9 Problems are handled in a professional and empathetic way
  - 4.10 Action is preceded by analysis planning and strategic thinking

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to ensure that commitment is gained towards the organisation's objectives/direction	3
Collecting analysing and organising information	to ensure that individuals and teams across the organisation are well informed	3
Planning and organising activities	to provide the necessary support to team members	3
Working with others and in teams	to develop innovative approaches to achieving organisational objectives	3
Using mathematical ideas and techniques	to assist in the calculation of organisation targets, objectives and performance criteria	2
Solving problems	to achieve business outcomes and assist teams	3
Using technology	to manage personal time and communicate with relevant groups and individuals	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Personal competence means:**

- the acquisition and demonstration of the range of behaviours necessary to achieve the organisational objectives. They may include:
  - flexibility
  - adaptability to change
  - accessibility
  - self analysis
  - decisiveness
  - personal performance appraisal

**Professional competence means:**

- the acquisition and demonstration of the range of knowledge and skills necessary to deliver optimum results for that part of the organisation for which the person is accountable

**Incidents may include:**

- product failure
- emergency response
- workplace accident
- environmental event (emissions, noise, etc)

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Accountabilities and responsibilities means:**

- clarification of who is to be accountable for a decision or action prior to its execution, and identification of groups, individuals and activities for which a person is responsible for managing

**Positive work environment means:**

- an environment where employees identify with the organisation and its purpose and where communication is free-flowing, decisions are transparent and conflict is positive and constructive

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Critical Aspects of Evidence

- Evidence of effective communication skills and an ability to win commitment to the organisation and its activities must be produced
- The extent to which personal and professional competence is demonstrated, will require input from a wide range of sources providing evidence in respect to a broad range of activities and situations
- The organisation must have a clear definition of the personal competence requirements of their managers

### OHS considerations may include:

- establish and maintain framework for OHS system
- leadership in OHS practice as ethical standards, legislative requirements and good corporate governance
- support for, and use of, participative arrangements

### Underpinning Knowledge

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation mission, purpose and values
- Organisation objectives, plans and strategies
- Leadership styles
- Strategic planning methodologies
- Data collection methods
- Inventory management systems including material resource planning systems
- Value chain concepts
- External environment scanning relating to social, political, economic and technological developments
- Core competency concepts
- Concept of sustainable competitive advantage
- Consultative processes and methods
- Organisational change processes
- Organisational design principles
- Legislation, codes and by-laws relevant to the organisation's operations

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.



**Underpinning Skills**

- Networking skills to ensure support from key groups and individuals for concepts/ideas/products/services
- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Risk management skills to analyse, identify and develop mitigation strategies for identified risks
- Situational analysis skills to direct, motivate, consult and/or delegate with the leadership behaviour appropriate to the competence and confidence of the team/individual involved and the circumstances of the situation
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT606A****Unit Descriptor****Manage customer focus**

This unit covers planning at the tactical level, and the implementation of those plans, to ensure that business expansion and internal and external customer satisfaction levels are in keeping with business plans.

Consider co-assessment with BSBMGT604A Manage business operations.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |  |  |
|--|--|
| 1. Determine customer requirements                       | <ul style="list-style-type: none"> <li>1.1 Opportunities are provided for customers and staff to provide feedback on existing products/services</li> <li>1.2 The market is clearly identified in terms of past, present and potential customers</li> <li>1.3 Research is commissioned to capture the needs of the market, including <i>electronic commerce</i> solutions</li> <li>1.4 The market is provided with all relevant information about products/services supplies</li> <li>1.5 <i>Customer service standards and plans</i> are developed from research, customer feedback and consultation with relevant individuals</li> <li>1.6 Standards and plans clearly state quality, time and delivery specifications, and cost of products/services to be supplied</li> <li>1.7 Specifications meet all legal and organisational requirements</li> <li>1.8 <i>Risk management</i> plans have been implemented in relation to all products/services</li> </ul> |
| 2. Manage delivery of products and services to customers | <ul style="list-style-type: none"> <li>2.1 <i>Relevant groups and individuals</i> have access to customer service standards and plans</li> <li>2.2 <i>Relevant groups and individuals</i> are competent to deliver products/services to standards required</li> <li>2.3 Products/services are delivered to standard required</li> <li>2.4 Groups and individuals meet all <i>customer service standards and plans</i></li> <li>2.5 Performance improvement plans are developed and implemented where under-performance occurs or opportunity for improvement arises</li> </ul>   |
| 3. Monitor and evaluate quality of customer service      | <ul style="list-style-type: none"> <li>3.1 <i>Appropriate systems</i> are developed and technology used to effectively monitor performance against targets and standards</li> <li>3.2 Feedback is obtained in regard to <i>customer satisfaction</i>, on an on-going basis, and utilised to implement remedial action where necessary</li> <li>3.3 Appropriate groups and individuals are consulted to identify activities to be undertaken to improve customer service</li> <li>3.4 Continuous improvement strategies are built into future business plans of relevant groups and individuals</li> <li>3.5 Reports are prepared and circulated to relevant groups and individuals for follow-up</li> </ul>  |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to consult groups and individuals about improvement to customer service	3
Collecting analysing and organising information	to develop customer service standards and plans	3
Planning and organising activities	to assess performance	3
Working with others and in teams	to identify customer needs	3
Using mathematical ideas and techniques	to develop service standards, response times and measurement systems	2
Solving problems	to remove customer concerns	3
Using technology	to monitor performance against targets	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Electronic commerce refers to:**

- business-to-business, business-to-consumer, government-to-business activities conducted via electronic communication methodologies and networks

**Customer service standards and plans may include:**

- response times/delivery times
- protocols
- quality specifications

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Relevant groups and individuals means:**

- those persons who have a responsibility for the delivery of products/services to both external/internal customers

**Appropriate systems may include:**

- quality management
- customer feedback/response

**Customer satisfaction means:**

- the extent to which the product or service delivered matches the customer's expectations in regard to price, quality and value to them

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- All managers have customers (either internal or external) and assessment should cover the whole customer service/quality assurance process
- Managers should be actively involved in the development of customer service standards (clearly linked to the customer requirements) and clear evidence needs to be available of their effective oversight of the delivery of products and services to predetermined specifications and customer expectations

**OHS considerations may include:**

- review of standards, plans and specifications in terms of OHS legislation (supplier, importer, etc.)
- safe delivery of organisation's products/services
- systems for supply monitor OHS performance

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Marketing principles sufficient to communicate with marketing experts as necessary
- Electronic commerce applications relevant to the organisation
- Legal requirements to operate the organisation
- Organisational policies, principles, codes and performance standards
- Risk management
- Performance management systems used in the organisation
- Quality management systems

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Risk management skills to analyse, identify and develop mitigation strategies for identified risks
- Performance measurement skills to develop and manage key performance indicators
- Report writing skills to develop and disseminate information on customer service performance
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT607A****Unit Descriptor****Manage knowledge and information**

This unit covers the development and maintenance of information processing systems to support decision making and optimise the use of knowledge and learning throughout the organisation. The unit is related to almost every other unit in Strategic Management. Depending upon the circumstances, co-assessment could be undertaken with any number of them.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Obtain information relevant to business issues | <ul style="list-style-type: none"> <li>1.1 Staff and customer feedback, as well as business performance data, is reviewed</li> <li>1.2 Business problems and issues are identified, defined and analysed</li> <li>1.3 Information required to reach a decision on problems/issues, is identified</li> <li>1.4 Information is reliably sourced and efficiently gathered</li> <li>1.5 Information is tested for reliability and validity, and rejected where contradictory or ambiguous</li> <li>1.6 Formal and informal networks are utilised to access corporate knowledge/memory not held in formal systems, and are reviewed appropriately</li> </ul>  |
| 2. Analyse information and knowledge              | <ul style="list-style-type: none"> <li>2.1 Objectives for analyses are clear, relevant and consistent with the decisions required</li> <li>2.2 Patterns and emerging trends are correctly identified and interpreted as to cause and effect</li> <li>2.3 <i>Statistical analyses</i> and interpretation are utilised where appropriate</li> <li>2.4 <i>Sensitivity analysis</i> is undertaken on any options proposed</li> <li>2.5 Documentation reflects logical approach to the evaluation of the evidence and conclusions drawn</li> <li>2.6 <i>Management information systems/decision support systems</i> are adjusted to meet information processing objectives</li> </ul>   |
| 3. Take decisions on business issues identified   | <ul style="list-style-type: none"> <li>3.1 Sufficient valid and reliable information/evidence is available to support a decision</li> <li>3.2 <i>Risk management</i> plans are utilised to determine acceptable courses of action</li> <li>3.3 <i>Quantitative methods</i> which are appropriate, are utilised to assist decision making where appropriate</li> <li>3.4 Specialists and other <i>relevant groups and individuals</i> are consulted</li> <li>3.5 Decisions taken are within the delegation/accountability of the group/individual responsible</li> <li>3.6 Decisions reached are in accordance with organisation guidelines/procedures</li> <li>3.7 Decisions taken are consistent with organisation objectives, values and standards</li> <li>3.8 Decisions are taken in a <i>timely manner</i></li> </ul> |

4. Disseminate information to the organisation
- 4.1 *Research* and consultation is undertaken in respect to group/individual information needs
  - 4.2 Advice/information needs are documented and specific in respect to location, format and timeline requirements
  - 4.3 Information is documented and data bases updated regularly
  - 4.4 *Systems* are designed and tested to meet information requirements of decision makers
  - 4.5 Information is up-to-date, accurate and relevant and sufficient for the recipient
  - 4.6 *Communication plans* are developed which provide for recipient evaluation on a regular basis
  - 4.7 Confidentiality/privacy policies are adhered to in the transmission/release of information/advice
  - 4.8 *Communication plans* are regularly reviewed and up-dated
  - 4.9 *Technology*, which provides optimum efficiency and quality, is utilised
  - 4.10 *Corporate knowledge* is maintained and security is ensured

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to develop communication plans for decisions to be taken	3
Collecting analysing and organising information	to identify problems/issues requiring intervention	3
Planning and organising activities	to develop and maintain informal networks	3
Working with others and in teams	to ensure the quality and adequacy of the information available for the decision	3
Using mathematical ideas and techniques	to apply in quantitative decision making techniques	2
Solving problems	to identify and rectify problems/issues	3
Using technology	to collect and analyse information and disseminate decisions	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Statistical analyses may include:**

- short to medium term trend analyses
- long term trend analyses
- regulation analyses
- correlation calculations
- probability assessment

**Sensitivity analyses means:**

- applying what/if scenarios to the various options available

**Management information systems means:**

- the formal systems for collecting, storing and synthesizing information to be used in management decision making

**Decision support systems are:**

- management information systems which include some form of computer-based assistance to decision making (expert systems)

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Quantitative methods may include:**

- linear programming
- transportation methodology
- queuing theory
- dynamic programming
- simulation

**Relevant groups and individuals means:**

- those personnel who have knowledge about the issue being dealt with and the expertise to assist the decision making process

**Timely manner means:**

- promptly, and providing adequate time for planning and implementation



**Research may include:**

- surveys
- focus groups
- individual interviews
- group interviews

**Systems refers to:**

- a detailed description/depiction of how organisations relate to their environments and how they process information through strategic and tactical management to develop actual operating procedures

**Communication plans means:**

- a structured program for the dissemination of information, and the receipt of feedback information from individuals, relevant to the process or activity

**Technology may include:**

- telephone
- radio
- television
- internet
- intranet
- print media
- audio visual media

**Corporate knowledge may include:**

- technology
- copyright
- intellectual property

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence must be available which tracks a particular problem/issue through the information gathering and analysis phase and arrives at a decision (or decisions) which is/are taken and are disseminated to relevant groups and individuals in the organisation and outside it (where appropriate)
- Evidence should also be available of the development/utilisation of relevant information processing systems, as well as accessing informal information/knowledge from informal networks within the organisation

**OHS considerations may include:**

- provision of information about OHS and the organisation's OHS policies, procedures and programs
- establishment and maintenance of systems for OHS information records, data analysis and reporting

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Knowledge of the Key Result Areas of the organisation and their supporting strategies/plans/objectives
- Statistical techniques for analysing and interpreting data
- Decision systems to evaluate options and take the decision
- Risk management
- Information processing

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Networking skills to ensure support from key groups and individuals for concepts/ideas/products/services
- Analytical skills to identify improvement opportunities in relation to the services/products you deliver internally or concepts/ideas in your area of expertise
- Evaluative skills to maintain performance and assess the use of alternative suppliers/contractors
- Operations management skills to utilise quantitative techniques as an aid to decision making
- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT608A****Unit Descriptor****Manage innovation and continuous improvement**

This unit covers sustaining an environment in which continuous improvement and learning are promoted and rewarded, including the application of relevant technology.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |  |
|---|--|
| 1. Review programs, systems and processes     | 1.1 <i>Strategies</i> are established to monitor and evaluate performance of key systems and processes<br>1.2 Detailed analyses of <i>supply chains</i> , operational and product/service delivery systems are undertaken<br>1.3 Performance measures, assessment tools and techniques are identified, analysed and acted upon<br>1.4 <i>Performance reports</i> and variance from plans are analysed for all key result areas of the organisation<br>1.5 Changing trends and opportunities relevant to the organisation are identified and analysed<br>1.6 Advice is sought from <i>specialists</i> , where appropriate, to identify technology and electronic commerce opportunities   |
| 2. Develop options for continuous improvement | 2.1 Groups are briefed on performance improvement strategies and innovation as an essential element of competition<br>2.2 <i>Creative climate</i> and <i>organisational learning</i> is fostered through the promotion of interaction within and between work groups<br>2.3 New ideas and entrepreneurial behaviour are encouraged, tried and recognised where successful<br>2.4 <i>Failure</i> of an idea is accepted as a reasonable price during trialling; success is recognised and celebrated, and embedded into systems<br>2.5 <i>Risk management</i> and <i>cost benefit analyses</i> are undertaken for each option/idea approved for trial<br>2.6 <i>Innovations</i> are approved through agreed organisational processes                    |
| 3. Implement innovative processes             | 3.1 <i>Continuous improvement</i> is promoted as an essential part of doing business<br>3.2 Impact of change and consequences for people are addressed and <i>transition plans</i> implemented<br>3.3 Objectives, timeframes, measures and communication plans are in place to manage implementation<br>3.4 <i>Contingency plans</i> are implemented in the event of non-performance<br>3.5 <i>Failure</i> is followed by prompt investigation and analysis of causes<br>3.6 <i>Emerging challenges and opportunities</i> are managed effectively<br>3.7 <i>Continuous improvement</i> systems and processes are regularly evaluated<br>3.8 Costs and benefits of innovations and improvements are communicated to all relevant groups and individuals |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to brief groups on performance improvement strategies	3
Collecting analysing and organising information	to undertake performance/variance analysis	3
Planning and organising activities	to promote learning and interaction between work groups	3
Working with others and in teams	to undertake risk management and cost benefit analysis	3
Using mathematical ideas and techniques	to apply statistical and quantitative analysis	2
Solving problems	to ensure successful implementation of the innovation	3
Using technology	to enhance the innovation	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Strategies means:**

- long term plans which will guide the organisation in achieving its mission

**Supply chain refers to:**

- a network of facilities that procures raw materials, transforms them into intermediate products (or services) and then finished goods (or services), and delivers them through a distribution system. It spans procurement, production and distribution; views them not as discrete elements but interlinked

- Performance reports may include:**
- financial
  - budget/cost variance
  - OHS
  - environmental
  - quality
  - customer service
  - other operating parameters
- Specialists refers to:**
- those people inside and outside the organisation who are expert in the application of technology to process systems and procedures, relevant to the organisation's business
- Creative climate means:**
- a climate of high motivation, extensive expertise, deliberative and lateral thinking time to think through and test out ideas
- Organisation learning refers to:**
- the extent to which groups and individuals within an organisation are given the opportunity to learn from each other and encouraged to share their learning
- Failure means:**
- partial or total failure of an innovation or idea to meet the pre-determined objectives/outcomes
- Risk management means:**
- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur
- Cost benefit analyses means:**
- a calculation to determine whether the results/outcomes of a particular course of action are sufficient to justify the costs and risks in taking that action
- Innovations means:**
- to bring in something new to the organisation. It may be an adaptation or change to a process, product, service, procedure or system, as well as something completely new
- Continuous improvement means:**
- consistently reviewing what we do in search of a better way and improving the organisation in every aspect of its activities
- Resources may include:**
- physical
  - financial
  - human
- Transition plan means:**
- a process of communication and education to help people through major change programs which impact on the way they do their work or them personally

**Contingency plan means:**

- a plan which will deal with the uncertainty of a proposal and will come into operation in the event of a failure or non-conformance

**Emerging challenges and opportunities means:**

- events/incidents relating to the innovation being implemented which could lead to a less effective implementation (challenge) or greater benefits to the organisation than previously thought (opportunity)

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Whilst evidence of success in bringing an idea into the organisation and developing an innovation is always the objective of these activities, evidence of idea creation, innovation, testing and evaluation is more critical. The innovations do not have to work for successful promotion to be evidenced
- Evidence of both formal and informal consultation and participation in the search for continuous improvement is essential for this unit

**OHS considerations may include:**

- evaluation of organisation's OHS system and related policies, procedures and programs
- implementation of OHS management system with continuous improvement features

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Strategic planning
- Supply chain management
- Performance measurement
- Quality management
- Electronic commercial applications
- Creativity/innovation theories/concepts
- Risk management
- Contingency plans
- Continuous improvement

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Quantitative methods including queuing transport, ATM and linear programming techniques
- Analytical skills to identify improvement opportunities in relation to the services/products you deliver internally or concepts/ideas in your area of expertise
- Evaluative skills to maintain performance and assess the use of alternative suppliers/contractors
- Performance measurement skills to develop and manage key performance indicators
- Risk management skills to analyse, identify and develop mitigation strategies for identified risks
- Cost and benefit analysis skills to produce balanced arguments to support financial proposals
- Contingency planning skills to ensure that the risk of failure is minimised and/or in the event of failure, the consequences are minimal
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT609A****Unit Descriptor****Manage risk**

This unit covers the development, implementation and evaluation of a risk management plan for the organisation. It incorporates an assessment of all potential risks facing the organisation and the development of strategies and plans to mitigate all risk situations through elimination, isolation or protection.

This unit provides a foundation for other Strategic Management units available at Advanced Diploma level.

Consider co-assessment with any other unit in which risk analysis and risk management are an integral part, especially BSBMGT610A Manage environmental management systems.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |                                   |   |
|-----------------------------------|---|
| 1. Develop risk management plan   | <ul style="list-style-type: none"> <li>1.1 Strategic position and policy on <i>risk management</i> are analysed and interpreted</li> <li>1.2 Organisation is audited to identify risk management context and potential areas of risk</li> <li>1.3 Organisational capability to reduce/control the likelihood of both incidents and consequences is analysed</li> <li>1.4 <i>Risk register</i> is developed incorporating a probability/consequence matrix</li> <li>1.5 <i>Risk management</i> policies are documented and include provisions for training/education of all <i>relevant groups and individuals</i></li> <li>1.6 Access to <i>external specialist assistance</i> is identified within the plan</li> <li>1.7 Procedures for on-going identification of <i>risks</i> are established</li> </ul> |
| 2. Implement risk management plan | <ul style="list-style-type: none"> <li>2.1 Monitoring of activities to identify potential risk is undertaken continuously</li> <li>2.2 Sources of risk are clearly documented and analysed</li> <li>2.3 <i>Risks</i> are examined in terms of the criteria in the risk management plan</li> <li>2.4 <i>Risks</i> classified as low/acceptable are placed on a monitor/review watch list</li> <li>2.5 <i>Risks</i> that are unacceptable are eliminated wherever practicable</li> <li>2.6 <i>Risks</i> that cannot be eliminated are mitigated/minimised in accordance with the <i>risk management</i> plan</li> <li>2.7 Strategies for risk minimisation are documented</li> </ul>  |
| 3. Evaluate risk management plan  | <ul style="list-style-type: none"> <li>3.1 Procedures are in place to review <i>risk management</i> activities regularly</li> <li>3.2 Activities which do not achieve their objectives/performance outcomes are examined to determine cause</li> <li>3.3 Incidents which occur that indicate a <i>near miss</i> are analysed and the <i>risk management</i> plan reviewed on each occasion</li> <li>3.4 Evaluation of <i>risk management</i> is a key component of all projects/activities</li> </ul>   |



## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to educate managers about the importance of the risk management plan	3
Collecting analysing and organising information	to conduct the risk management audit	3
Planning and organising activities	to develop appropriate mitigation strategies	3
Working with others and in teams	to simulate/test the effectiveness of the risk management plan	3
Using mathematical ideas and techniques	to calculate probability and consequences associated with risk	2
Solving problems	to eliminate and/or minimise risk	3
Using technology	to provide timely access to risk management documentation	2

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

**Risk management means:**

- the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur

**Risk register refers to:**

- a register of all identified risks and documentation of the strategies/plans in place to deal with any event/incident which might occur

**Relevant groups and individuals refers to:**

- those personnel who have knowledge about the issue being dealt with and the expertise to assist the decision making process

**External specialist assistance means:**

- any group or individual in the community who has the expertise to assist the organisation to deal with any event/incident which may occur

**Risks may include:**

- Occupational Health & Safety (including disease)
- environmental
- product failure
- financial/economic loss/failure
- damage to property/equipment
- industrial disputation
- professional incompetence
- natural disasters
- security failure (including criminal or terrorist activities)
- equipment/system failures
- political events

**Near miss refers to:**

- an event or incident which, in other circumstances, may have resulted in an injury to a person, damage to property or some other negative impact on the organisation or the community

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- This unit is about managing risk. It is not about being an expert in every facet of the business and/or doing all of the risk management planning and implementation. There needs to be clear evidence of a systematic approach to the identification of risk in each of the relevant categories and the development of plans to eliminate, isolate or protect people (and/or equipment) in the event of the potential negative event occurring
- **Note:** Persons and organisations engaged in assessing managers in this unit need to themselves have appropriate qualifications and experience in risk management as well as assessment

**OHS considerations may include:**

- review and evaluation of previous OHS plans and programs
- implementation of OHS systems for projects
- use of participative arrangements for review of OHS in operational performance
- development and review of OHS performance targets
- framework and components of OHS management system, its structures and performance
- systemic review procedures

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Strategic, tactical and operational plans of the organisation
- Organisational capability to deal with events/incidents
- Disaster/emergency/evacuation plans
- Legal requirements for operating the business
- Relevant awards and industrial agreements
- Workplace standards for OHS and environmental requirements

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Conflict management skills to mediate, negotiate and/or attempt to obtain consensus between individuals/groups in conflict situations which are dysfunctional in relation to the organisation's performance
- Process analysis skills to identify potential risks/hazards of any type
- Problem solving skills to deal effectively with risks and hazards as identified
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMGT610A****Unit Descriptor****Manage environmental management systems**

This unit covers the scoping, establishment and review of the organisation's environmental management systems in regard to environmental sustainability as an integral part of business planning.

All those who have a senior management responsibility would be advised to undertake this unit.

This unit is related to BSBMGT505A Ensure a safe workplace and BSBMGT507A Manage environmental performance. Consider co-assessment with BSBMGT609A Manage risk.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |   |   |
|---|---|
| 1. Establish an environmental management system | <p>1.1 <i>Environmental management policies</i> that reflect the organisation's commitment to <i>environmental sustainability</i> are developed</p> <p>1.2 Environmental sustainability is identified as an integral part of business planning and promoted as a business opportunity</p> <p>1.3 Policies encourage all <i>stakeholders</i> to meet high standards of <i>environmental performance</i> and to support sustainable innovation and continuous improvement</p> <p>1.4 Policies and procedures are established to incorporate and support <i>triple bottom line principles</i></p> <p>1.5 Policies are established which <i>maximise opportunities</i> and <i>minimise environmental impacts</i></p> <p>1.6 Environmental management is addressed at the planning, design and evaluation stages of any change in the workplace to ensure that ongoing impacts and opportunities are identified</p>  |
| 2. Manage innovation and improvement            | <p>2.1 Changing trends and opportunities relevant to the organisation are identified, evaluated and taken into consideration for ongoing improvement programs</p> <p>2.2 <i>Continuous improvement</i> and <i>sustainable innovation</i> are promoted as an essential part of doing business and as a context for assessment and planning of environmental performance</p> <p>2.3 Continuous improvement and innovation policies and procedures, which include training and professional development, are established to optimise the environmental performance of the organisation</p> <p>2.4 A system is established to analyse and communicate the costs and benefits of innovations and improvements and to measure, monitor and record environmental performance</p> <p>2.5 <i>Performance benchmarks</i> and indicators are established and <i>targets</i> are set to maximise continuous improvement</p> |
| 3. Review environmental management system       | <p>3.1 Processes are developed to ensure that an integrated ongoing review is part of the organisation's policy and procedures</p> <p>3.2 Organisational performance is subject to ongoing evaluation and assessment, and changes to policies are made as required to promote improvement and sustainable innovation</p>  |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to promote environmental policies as an integral part of the organisation's operations	3
Collecting analysing and organising information	to aid planning and development of management systems	3
Planning and organising activities	to develop environmental management strategies	3
Working with others and in teams	to negotiate, consult and to gain support for environmental issues	3
Using mathematical ideas and techniques	to aid planning and development	3
Solving problems	to develop management strategies	3
Using technology	to access and record information	3

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### **Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### **Environmental management polices must be:**

- relevant to the organisation's operations
- and must be appropriate to the scope and scale of the business

### **Environmental management polices may include:**

- local, national and international innovations, programs and ideas
- business sustainability
- environmental load reduction
- waste minimisation
- tenders for the provision of goods and services that specify environmentally preferred selection criteria
- protection of land and habitat
- ecological considerations
- regeneration of damaged ecosystems
- media releases as a result of incidents
- environmental reporting

**Knowledge of legislation, codes, national standards, industry codes of practice and workplace policies and procedures must:**

- be strictly relevant to the particular workplace and is not intended to include detailed technical aspects of environmental science and
- details of legislation must be directly relevant to the workplace
- be consistent with the concept that people at this level, will be dealing with environmental concepts as part of an overall management responsibility and not as an environmental specialist

**Environmental improvement plans may be established at management level and may include:**

- measuring, monitoring and recording environmental performance, and continually setting targets for measurable improvements
- all aspects of environmental performance including energy and other resource use, waste minimisation, recycling, transport use etc.

**Environmental sustainability may be influenced by:**

- the organisational culture and operations
- internal or external economic climate
- political climate
- market focus/considerations
- environmental impacts of the business operation

**Business sustainability means:**

- A sustainable business in this sense is profitable and competitive in the foreseeable future. Effective management of environmental impacts and opportunities can contribute to business sustainability by reducing costs, differentiating goods and services and contributing to a better corporate image.

**Stakeholders may include:**

- board members, financial backers, owners
- all members of the organisation, including management and staff members
- suppliers
- contractors
- others acting on the organisation's behalf
- customers
- external individuals or bodies who may have an interest in, or may be affected by the organisation

**Environmental performance may be defined as:**

- a measure of an organisation's impact on the environment and of their ability to manage that impact

**Triple bottom line principles can be defined as:**

- the integration of environmental, commercial and social aspects of business operations

**Maximising opportunities may involve :**

- improved environmental performance
- increased efficiency
- use of alternative energy sources

**and may improve/enhance:**

- corporate image
- staff morale
- cost reduction
- product differentiation/branding
- identification of market potential

**To minimise environmental impact may include minimisation of:**

- waste/pollution
- emissions/spills
- use of resources, especially reduction of use of non-renewable resources

**Continuous improvement and innovation policies may include:**

- consistently reviewing activities in search of a better way, and improving the organisation in all aspects of its operation

**and may look at life cycle impacts of the organisation including:**

- activities and products that are designed to minimise life cycle impacts and maximises opportunities
- tendering and purchasing processes that include life cycle criteria
- product design and manufacture
- packaging policies
- product use and disposal
- vehicle policies that include use of cleaner fuels or alternative energy sources and regular servicing intervals to reduce pollution and improve efficiency

**Performance benchmarks and targets may include:**

- best practice or industry codes for the industry/sector
- levels of performance expected of organisation sectors and/or the organisation as a whole

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Evidence will need to be provided of the ability to develop and establish environmental management policies, systems and procedures in regard to managing sustainable business practices while encompassing environmental sustainability as an integral part of business planning
- N.B. Particular note must be taken that evidence must be strictly relevant to the particular management role and is not intended to include detailed technical aspects of environmental science

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Required knowledge is to be limited to that which is sufficient to perform the particular management function and is intended to promote environmental awareness rather than technical environment competencies
- Concepts of policy development and business planning
- Relevant system analysis and design principles
- Performance benchmarking and indicator development relevant to organisation's activities
- Environment sustainability as a " whole-system" approach
- Techniques to measure sustainability
- Quality systems
- Supply chain management
- Strategies to maximise opportunities
- Environment impact minimisation strategies
- Relevant knowledge of environmental issues, especially in regard to water catchments, air, noise, ecosystems, habitat, waste minimisation
- Relevant knowledge of ecological systems in regard to business operation

At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

**Underpinning Skills**

- Communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input
- Conflict resolution skills to mediate, negotiate and/or attempt to obtain consensus between parties
- Planning and evaluation skills to develop policies and procedures
- Process analysis skills to identify potential environmental and ecological impacts and opportunities
- Problem solving skills to deal effectively with environmental impacts and opportunities as identified
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations



**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBMKG407A****Unit Descriptor****Make a presentation**

This unit covers the preparation, delivery and review of a presentation to a target audience.

**Competency Field**

Business Development

**ELEMENT****PERFORMANCE CRITERIA**

- |                             |   |
|-----------------------------|---|
| 1. Prepare the presentation | 1.1 Written preparation is undertaken to support delivery of the presentation<br>1.2 Outcomes for the presentation are determined to provide focus<br>1.3 <i>Presentation strategies</i> are chosen to match the <i>characteristics</i> of the target audience, the location, the resources and the personnel needed<br>1.4 <i>Presentation aids and materials</i> are selected to enhance audience understanding of key concepts and ideas<br>1.5 A strategy for evaluating the effectiveness of the presentation is prepared<br>1.6 Presentation is scheduled to meet the requirements of the target audience, any other personnel needed and the location  |
| 2. Deliver a presentation   | 2.1 The desired outcomes of the presentation are explained to, and discussed with the target audience<br>2.2 Presentation aids, materials and examples are used to support target audience understanding of key concepts and ideas<br>2.3 Non verbal and verbal communication of participants is monitored to promote attainment of presentation outcomes<br>2.4 Opportunities are provided for participants to seek clarification on key ideas and concepts and the presentation is adjusted to meet participant needs and preferences<br>2.5 Key concepts and ideas are summarised at strategic points to facilitate participant understanding<br>2.6 Variations in verbal and non-verbal communication are used to maintain participant engagement |
| 3. Review the presentation  | 3.1 A <i>review strategy</i> is implemented to determine the effectiveness of the presentation<br>3.2 The strategy selected utilises feedback from participants<br>3.3 The reactions of key personnel to the delivery are sought and discussed<br>3.4 Adjustments to delivery are considered and incorporated   |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	Communicating ideas and information through using presentation aids and materials to support verbal explanation of concepts and ideas.	3
Collecting analysing and organising information	Collecting, analysing and organising information in preparing information to present to a target audience	2
Planning and organising activities	Planning and organising activities in scheduling the presentation and in ensuring materials and equipment are available	2
Working with others and in teams	Working with teams and others to coordinate the input of all personnel at the presentation	2
Using mathematical ideas and techniques	Using mathematical ideas and techniques in presenting numerical data to support a key idea or concept	1
Solving problems	Solving problems in deciding how to adjust a presentation during delivery to meet target audience needs	3
Using technology	Using technology in demonstrating audio and visual materials to support a presentation	1

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

### Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

### Delivery may be :

- face to face
- via teleconferencing
- via closed circuit television
- through computer assisted methods

**Presentation strategies may involve:**

- oral presentations
- discussion
- questioning
- simulations and role-play
- case studies
- group and/or pair work
- demonstration

**Characteristics of the target audience may relate to:**

- language, literacy and numeracy needs
- cultural and language background
- educational background or general knowledge
- gender
- age
- physical ability
- previous experience with the topic

**Presentation aids and materials may include:**

- video and audio recordings
- overhead projector
- paper-based materials
- models
- diagrams, charts and posters
- whiteboard
- computer simulations and presentations

**Review strategies may include use of:**

- one on one interviews with participants and other personnel
- focus groups interviews
- written feedback provided by participants
- action research
- critical "friends"

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Integrated demonstration of all elements of competency and their performance criteria
- A real or simulated presentation which meets the information needs of the target group.

**Underpinning Knowledge**

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Range of presentation strategies
- Range of presentation aids and materials available to support presentations
- Data collection methods that can be used to support review of presentations
- Key principles association with explanation and demonstration of concepts and ideas

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to prepare presentation information, and write in a range of styles for different target audiences
- Communication including questioning, clarifying, re-phrasing
- Presentation skills
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- Ability to utilise verbal and non-verbal techniques to sustain participant engagement

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
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- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

**BSBSBM406A****Unit Descriptor****Manage finances**

This unit involves the implementation, monitoring and review of strategies for the ongoing management of finance. It also includes day-to-day financial management of the business. It is suitable for existing micro and small businesses or a department in a larger organisation.

**Competency Field**

Business Management Services

**ELEMENT****PERFORMANCE CRITERIA**

- |                                  |   |
|----------------------------------|---|
| 1. Maintain financial records    | <p>1.1 <i>Financial information</i> requirements are identified and <i>specialist services</i> obtained, as required, to profitably operate and extend the business in accordance with the business plan</p> <p>1.2 Financial information records are identified to meet the needs of the business in accordance with legal requirements</p> <p>1.3 <i>Relevant accounting</i> procedures maintained according to legal requirements and/or specialist services sought as required</p> <p>1.4 Administration and financial record keeping procedures are developed and documented in accordance with legal requirements</p>   |
| 2. Implement financial plan      | <p>2.1 Financial budgets/projections, including cash flow estimates, are produced as required for each forward period, and distributed to <i>relevant people</i> in accordance with legal requirements</p> <p>2.2 Business capital is negotiated/ secured/ managed to best enable implementation of the business plan and meet the requirements of <i>financing bodies</i></p> <p>2.3 Taxation records are maintained and reporting requirements complied with</p> <p>2.4 Strategies to enable adequate financial provision for taxation developed and maintained in accordance with legal requirements</p> <p>2.5 Client <i>credit policies</i> including contingencies for debtors in default are developed, monitored and maintained to maximise cash flow</p> <p>2.6 Key performance indicators are selected to enable ongoing monitoring of financial performance</p> <p>2.7 Financial procedures are recorded and communicated to relevant people to facilitate implementation of the business plan</p> |
| 3. Monitor financial performance | <p>3.1 Financial performance targets are regularly monitored and reported and data is gathered to establish the extent to which the financial plan has been met</p> <p>3.2 Marketing and operational strategies are monitored for their effects on the financial plan</p> <p>3.3 Financial ratios are calculated and evaluated according to own/industry benchmarks</p> <p>3.4 Financial plan is assessed to determine whether variations or alternative plans are indicated and changed as required</p> <p>3.5 Appropriate action is taken to ensure the achievement of profit and return to enable business operation in accordance with the business plan and legal requirements</p>   |

## KEY COMPETENCIES

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Key Competency	Example of Application	Performance Level
Communicating ideas and information	to obtain and convey financial information	2
Collecting analysing and organising information	to acquire and manage finances	3
Planning and organising activities	to comply with legal requirements and manage finances	2
Working with others and in teams	to obtain financial information	2
Using mathematical ideas and techniques	to plan and maintain finances	2
Solving problems	to maximise business financial viability	3
Using technology	to optimise business performance	3

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

**Legislation, codes and national standards relevant to the workplace which may include:**

- award and enterprise agreements and relevant industrial instruments
- national, State/Territory and Local Government legislative requirements affecting business operation, especially in regard to Occupational Health and Safety and environmental issues, EEO, industrial relations and anti-discrimination
- relevant industry codes of practice

**Financial information may include:**

- financial budgets
- business capital
- cash flow forecasts
- statements/forecasts
- bookkeeping/accounting/stock/job costing records
- asset registers
- profit and loss statements
- balance sheets
- payroll records, superannuation entitlements
- accrual of staff leave/entitlements
- taxation returns including GST
- business activity statements
- ratios for profitability, liquidity/efficiency/financial structure
- risk management
- financial indicators may be short, medium and/or long term
- asset management strategies which may include:
  - owning, leasing, sharing, syndicating
  - maintaining and deploying assets

**Relevant accounting procedures may include:**

- accrual/cash
- single entry/double entry
- manual/computerised

**Specialist services may include:**

- accountants
- lawyers and providers of legal advice
- government agencies
- industry/trade associations
- online gateways
- business brokers/business consultants

**Relevant people may include:**

- owner/operator
- partners
- financial backers
- family members
- franchise agency
- trade or industry associations
- regulatory bodies

**Legal requirements may include:**

- contractual arrangements (eg partnership agreements, trust deeds)
- corporations law
- industrial law (for payroll records)
- taxation law

**Financial bodies may include:**

- financiers/banks/lending institutions
- shareholders/partners/owners



**Credit policies may include:**

- debt collection
- trading terms
- credit limits
- payment options
- credit references

**Financial ratios may include:**

- Gross profit percentage
- Net profit percentage
- Expense percentages
- Stockturn rates
- Staff productivity measures
- Return on investment/Return on total assets
- Current ratio
- Liquid ratio
- Days stock on hand
- Days debtors outstanding
- Proprietary/debt ratio

**EVIDENCE GUIDE**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Ability to develop, implement and review strategies for the ongoing management of finance and
- To maintain day-to-day financial management of the business as well as implementation of broad financial strategies.

**Underpinning Knowledge**

- National, State/Territory and Local Government legislative requirements affecting business operation, especially in regard to Occupational Health and Safety and environmental issues, EEO, industrial relations and anti-discrimination
- Financial decision making relevant to the business
- Basic knowledge of specific tax requirements relevant to the individual industry
- Legal obligations for record keeping
- Processing financial transactions
- Basic accounting principles (single entry/double entry)
- Purpose of financial reports
- Financial ratios
- Interpretation of comparative profit and loss statements
- Interpretation of comparative balance sheets
- Preparation and interpretation of budget/actual reports
- Stock records/stock control relevant to the business
- Benchmarking
- Methods and relative costs of obtaining finance

At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

**Underpinning Skills**

- Literacy skills to interpret legal requirements, company policies and procedures
- Communication including reporting
- Numeracy skills to undertake financial calculations
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

**Resource Implications**

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

**Consistency of Performance**

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

**Context/s of Assessment**

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels earlier in this unit



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