

SRO03 OUTDOOR RECREATION TRAINING PACKAGE

Volume 1

The contents of this volume refer only to the endorsed components of SRO03 Outdoor Recreation Training Package. This volume should not be read in isolation but in the context of the Training Package as a whole. Please refer to the following page for details of other volumes in this Training Package.

To be reviewed by 30 January 2007.

This volume contains
Generic Units of Competency

Associated Outdoor Recreation Training Package volumes contain:
**Qualifications Framework, Assessment Guidelines, Competency Standards and
Mapping Tables**

Volume 2: Generic Units of Competency

Volume 3: Generic Units of Competency

Volume 4: Outdoor Recreation Specific Units of Competency

Volume 5: Outdoor Recreation Specific Units of Competency

Volume 6: Outdoor Recreation Specific Units of Competency

SRO03 Outdoor Recreation Training Package

This Training Package has been produced on behalf of the national training system. It was funded under National Programmes administered by the Australian National Training Authority until 25 August 2005 and subsequently by the Commonwealth of Australia from that date.

© Commonwealth of Australia 2006

This work is copyright. It may be reproduced in whole or in part for study or training purposes, subject to the inclusion of an acknowledgement of the source and it is not used for commercial use or sale. Reproduction for purposes other than those indicated above requires the prior written permission from the Commonwealth. Requests and enquiries concerning reproduction and copyright should be addressed to:

Branch Manager
Technology and Information Services Branch
Industry Skills Development Group
Department of Education, Science and Training
GPO Box 9880
CANBERRA CITY ACT 2601

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

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

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

Published by: *Australian Training Products Ltd*
PO Box 12211
MELBOURNE VIC 8006
Level 25 150 Lonsdale St
MELBOURNE VIC 3000
Telephone: (03) 9655 0600
Facsimile: (03) 9639 4684
Email: sales@atpl.net.au
Website: www.atpl.net.au

First published: *March 2003*
Stock Code Number: *ATP12383H*
ISBN: *0 642 80457 5*
Printed by: *Document Printing Australia*
AEShareNet Code: *Ffe*
Print Version No: *2*
Release Date: *13 September 2006*

Contents of SRO03 Outdoor Recreation Training Package

Competency Standards	Volume 1 Generic Units of Competency	Volume 2 Generic Units of Competency	Volume 3 Generic Units of Competency
Assessment Guidelines			
Qualifications Framework	Volume 4 Outdoor Recreation Specific Units of Competency	Volume 5 Outdoor Recreation Specific Units of Competency	Volume 6 Outdoor Recreation Specific Units of Competency
Mapping Tables			

IMPORTANT

Training Packages are not static documents. Changes are made periodically to reflect the latest industry practices.

Before commencing any form of training or assessment, you must ensure delivery is from the *current version* of the Training Package.

To ensure you are complying with this requirement :

- Check the Print Version Number just below the copyright statement on the imprint pages of your current Training Package.
- Access the ATP website (www.atpl.net.au) and check the latest Print Number.
- In cases where the Print Version Number is later than yours, the Print Version Modification History in the Training Package sample on the ATP website will indicate the changes that have been made.

The Modification History is also available on the website of the developer of the Training Package: Sport & Recreation Training Australia Ltd www.srt.org.au

The National Training Information Service (www.ntis.gov.au) also displays any changes in Units of Competency and the packaging of qualifications.

MODIFICATION HISTORY – ENDORSED MATERIALS			
Please refer to the National Training Information Service for the latest version of Units of Competency and Qualification information (http://www.ntis.gov.au).			
SRO03 Outdoor Recreation Training Package			Sheet: 1 of 1
Version	Date of Release	Authorisation	Comments
2	13 September 2006	NQC	- Repackaging of ALL SRO qualifications. Core BSB and ICAITU units moved to the elective stream, where appropriate - Inclusion of the Units of Competency from TAA04 to replace the BSZ98 Training and Assessment units - Correction of typographical errors in the codes imported from the TDT Training Package
1	21/10/2005	DEST	Insertion of SRO50404 Diploma of Facility Management. Insertion of THT50203 Diploma of Event Management.
1.00	22/05/03	ANTA	Removal of “nominal hours”
1.00	13/3/03	NTQC	Primary Release of fully revised version which supersedes the previous version coded SRO99

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.

TABLE OF CONTENTS

SECTION 1:

COMPETENCY STANDARDS

ASSESSMENT GUIDELINES.....

QUALIFICATIONS FRAMEWORK.....

MAPPING TABLES.....

SECTION 2:

Volume 1 SPORT AND RECREATION GENERIC UNITS OF COMPETENCY

GENERAL ADMINISTRATION.....	(ADM)
COACHING AND INSTRUCTION.....	(CAI)
COMMUNICATION.....	(COM)
DISABILITY.....	(DIS)
EMERGENCY RESPONSE.....	(EMR)
ENVIRONMENT.....	(ENV)
EVENTS.....	(EVT)
FACILITY MANAGEMENT.....	(FAC)
FIRST AID.....	(FAD)
FINANCE.....	(FIN)

Volume 2 SPORT AND RECREATION GENERIC UNITS OF COMPETENCY

FRONT LINE MANAGEMENT.....	(FLM)
CLIENT SERVICE.....	(GCS)
ORGANISATION GOVERNANCE.....	(GOV)
GROUPS.....	(GRO)
HOSPITALITY.....	(HOS)
HUMAN RESOURCE MANAGEMENT.....	(HRM)
HORTICULTURE.....	(HRT)
INNOVATION.....	(INN)
INDUSTRY.....	(INU)

Volume 3 SPORT AND RECREATION GENERIC UNITS OF COMPETENCY

MARKETING.....	(MKT)
ORGANISATION OF WORK.....	(OGN)
OCCUPATIONAL HEALTH AND SAFETY.....	(OHS)
PLANNING.....	(PLA)
RESOURCE MANAGEMENT.....	(RES)
RETAIL.....	(RET)
RISK MANAGEMENT.....	(RIK)
SALES.....	(SAL)
SMALL BUSINESS.....	(SMB)
TECHNOLOGY.....	(TCN)
TRAINING AND ASSESSMENT.....	(TAA)
WORKING IN TEAMS.....	(TEM)
YOUTH.....	(YTH)

Volume 4 OUTDOOR RECREATION UNITS OF COMPETENCY

ABSEILING – ARTIFICIAL SURFACE.....	(ABA)
ADVENTURE BASED LEARNING.....	(ABL)
ABSEILING – NATURAL SURFACE.....	(ABN)
AQUATICS.....	(AQU)
ARCHERY.....	(ARC)
BOATING OPERATIONS.....	(BOP)
BUSHWALKING.....	(BWG)
CANYONING.....	(CAY)
CLIMBING – ARTIFICIAL SURFACE.....	(CLA)
CLIMBING – NATURAL SURFACE.....	(CLN)
CANOEING.....	(CNE)
COMMUNITY RECREATION DEVELOPMENT.....	(CRD)
COMMUNITY RECREATION OPERATIONS.....	(CRO)
CHALLENGE ROPES COURSE.....	(CRP)

Volume 5 OUTDOOR RECREATION UNITS OF COMPETENCY

CAVING.....	(CVE)
CYCLING TOURS.....	(CYT)
DRIVING.....	(DRV)
EQUESTRIAN ACTIVITIES (INCLUDING RECREATIONAL HORSERIDING, HORSE TRAIL RIDING AND/OR SPORTS).....	(EQO)
FIRE ARM SAFETY.....	(FAS)
RECREATIONAL FISHING.....	(FSH)
INTERPRETATION.....	(INT)
KAYAKING.....	(KYK)
SEA KAYAKING.....	(KYS)
MOUNTAIN BIKING.....	(MBK)
NAVIGATION.....	(NAV)
OUTDOOR RECREATION.....	(ODR)

Volume 6 OUTDOOR RECREATION UNITS OF COMPETENCY

FIELD OPERATIONS.....	(OPS)
PERSONAL WATER CRAFT.....	(PWC)
RAFTING.....	(RAF)
SCUBA.....	(SCB)
SNOWBOARDING.....	(SKB)
SKIING.....	(SKI)
SKIING – SKI TOURING.....	(SKT)
SNORKELLING.....	(SNK)
SURFING.....	(SRF)
TRAIL BIKE RIDING.....	(TBR)
TOUR GUIDING.....	(TRG)
VERTICAL RESCUE.....	(VTR)
WHITE WATER RESCUE.....	(WWR)
YACHTING – BALLASTED YACHT.....	(YAC)
YACHTING – MOTOR CRUISERS.....	(YMC)
YACHTING – WINDSURFING.....	(YSA)
YACHTING – SMALL BOAT.....	(YSB)

GENERAL ADMINISTRATION

Contents

BSBADM307A Organise schedules.....	1
BSBADM402A Produce complex business documents	7
BSBADM405A Organise meetings	15
BSBADM406A Organise business travel	22
BSBADM502A Manage meetings.....	29
BSBADM504A Plan or review administrative systems	36
BSBADM506A Manage business document design and development	43
BSBCMN105A Use business equipment	49
BSBCMN205A Use business technology	55
BSBCMN206A Process and maintain workplace information	61
BSBCMN212A Handle mail.....	67
BSBCMN305A Organise workplace information.....	75
BSBCMN307A Maintain business resources	82
BSBCMN407A Coordinate business resources	88

BSBADM307A	ORGANISE SCHEDULES
ADM	General administration

DESCRIPTION: This unit covers managing appointments and diaries for personnel within the organisation, using both manual and electronic diary/appointment systems.

ELEMENT	PERFORMANCE CRITERIA
1 Establish schedule requirements	1.1 Organisational requirements and protocols for diaries and staff planning tools are identified 1.2 Organisational procedures for different types of appointments are identified 1.3 Personal requirements for diary/schedule items are determined for individual personnel 1.4 Appointment priorities are established and clarified in discussion with individual personnel
2 Manage schedules	2.1 Recurring appointments and deadlines are identified and scheduled in accordance with individual and organisational requirements 2.2 Availability of attendees is established and new appointments are scheduled in accordance with required timelines and diary commitments 2.3 Alternative arrangements are negotiated and confirmed when established appointments are changed 2.4 Appointments are recorded and schedules managed in accordance with organisational policy and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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, industrial relations and anti-discrimination • relevant industry codes of practice
Organisational requirements	may include • availability of information • priority clients / personnel • recording systems • protocols in contacting other personnel within and outside organisation • electronic linked diaries/schedules • linking personal and executive diaries
Planning tools	may include • manual planners • planning wall chart • in/out boards/whiteboards • appointment book • calendar • desk diary • electronic calendar/diary • appointment view; planner view in electronic scheduling systems
Diary / schedule items	may include • meetings • conferences • teleconferences • recurring appointments • deadlines • leave (for both immediate person and others whose absence affects the person) • travel
Recurring appointments	may include • board meetings

	committee meetings
Alternative arrangements	may include - inserting additional appointments after a schedule has been prepared - cancelling pre-arranged appointments - re-scheduling existing appointments
Records	may include - diary - calendar - paper based - electronic - filing system
Organisational policy and procedures	may include - Occupational Health and Safety issues - adequate time between appointments - lunch breaks - limit on total appointments in any one day - sufficient time to complete projects and meet deadlines - stress minimisation - leave - time off in lieu
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of managing appointments and diaries for personnel • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ establish schedules which meet individual and organisational needs ○ prioritise and negotiate ○ demonstrate knowledge of occupational health and safety issues related to scheduling and workload
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBADM405A Organise meetings ○ BSBADM406A Organise business travel
Required knowledge and skills	• Required 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 ○ Policies and procedures in regard to making appointments ○ Types of manual and electronic diary systems ○ The relationship between organising another person's schedule satisfactorily and achieving team goals ○ An understanding of the responsibility involved in making other's arrangements ○ Information sources • Required skills ○ Literacy skills to read a range of procedural texts; write simple instructions for a particular routine task; sequence writing; interpret information gained from diaries and charts ○ Communication skills to discuss and confirm requirements and priorities of others; question to clarify information ○ Time-management skills to allow realistic timelines to schedule appointments ○ Problem-solving skills to negotiate task distribution with other members of the group; select most appropriate times for appointments etc ○ Numeracy skills for time estimation, accurate planning and record keeping ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	• Physical resources - assessment of this competency requires access to

	○ appropriate documentation and resources normally used in the workplace which may include ▪ manuals and reference materials outlining policies and procedures regarding appointments ▪ diary and planner resources to record and schedule appointments ▪ calendar ▪ appointment books, diaries and other recording systems ▪ maps • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 • Assessment of performance requirements in this unit should be taken in an actual workplace or simulated environment • Assessment should reinforce the integration of the key competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this level

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To find common available times for appointments • Communicating ideas and information - To discuss and confirm appointments • Planning and organising activities - To manage diaries and schedules • Working with teams and others - To negotiate appointment times • Using mathematical ideas and techniques - To timetable appointments • Solving problems - To re-schedule meetings • Using technology - To maintain electronic diaries and use group meeting software Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM402A	PRODUCE COMPLEX BUSINESS DOCUMENTS
ADM	General administration

DESCRIPTION: This unit covers design and development of business documents using complex technical features of word processing and/or desktop publishing software.

ELEMENT	PERFORMANCE CRITERIA
1 Use safe work practices	1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user 1.2 Work organisation meets organisational and statutory requirements for computer operation 1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements
2 Analyse document requirements	2.1 Organisational and task requirements are identified prior to document design 2.2 Complex technical functions of the software are evaluated for their usefulness in fulfilling the requirements of the task 2.3 Document requirements are matched with software functions to provide efficient production of documents
3 Design complex documents	3.1 Document structure and layout are designed to suit the purpose, audience and information requirements of the task 3.2 Document is designed to enhance readability and appearance and meet organisational and task requirements for style and layout 3.3 Complex software functions are used to enable efficient manipulation of information and other material and ensure consistency of design and layout 3.4 Manuals, user documentation and on-line help are used to overcome problems with document design and production
4 Produce documents	4.1 Complex operations used in development of documents achieve desired results 4.2 Documents are previewed, adjusted and printed in accordance with organisational and task requirements 4.3 Documents are named and stored , in accordance with organisational requirements and the application exited without information loss/damage 4.4 Documents are prepared within designated timelines and organisational requirements for speed and accuracy

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, codes and national standards relevant to the workplace	which may include • award 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
Complex documents	may include • long documents • multiple sections • multiple headers and footers • different odd and even pages • master documents • subdocuments • primary mail merge documents • mail merge data documents • templates • multiple users • hyperlinks • concordance files • document protection • linked and/or embedded objects • captions • call outs • drawing • WordArt • forms with fields
Software	may include • word processing • advanced desktop publishing
Organisational policy and procedures	may include • log-on procedures • password protection • storage/location of data • standard formats • author's instructions

	• use of templates
Ergonomic requirements	may include • workstation height and layout • chair height, seat and back adjustment • footrest • screen position • keyboard and mouse position • document holder • posture • avoiding radiation from computer screens • lighting • noise minimisation
Work organisation	may include • mix of repetitive and other activities • rest periods • exercise breaks
Conservation techniques	may include • double-sided paper use • re-used paper for rough drafts (observing confidentiality requirements) • recycling used and shredded paper • utilising power-save options for equipment
Organisational requirements	may include • consistent corporate image • company logo • company colour scheme • established guidelines and procedures for document production • 'house styles' • content restrictions • templates • organisation name, time, date, document title, filename, etc in header/footer • observing copyright legislation
Complex technical functions	may include • table of contents • index • importing • exporting • linking • embedding • merge criteria • fields • form fields

	• formulae • sort criteria • macros • templates • display features • data transfer
Structure and layout	may include • white space • typeface • graphics • photographs • drawing • boxes • colour • page layout • headings • columns • letter and memo conventions
Design choices	may include • simplicity • diversity • balance • typography • text flow • relative positioning of graphics
Consistency of design and layout	may include • indentations • spacing • page numbers • typeface styles and point size • captions • bullet/number lists • footnotes/endnotes • annotated references • borders • consistency with other business documents
Printing	may include • with drawing objects • with comments • with hidden text • with field codes • to fit number of specific pages • print to file

	• print merge
Naming and storage of documents	may include • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date etc • file names according to organisational procedure, eg, numbers rather than names • storage in folders/sub-folders • storage on hard/floppy disk drives, CD ROM, tape backup • organisation policy for backing up files • organisation policy for filing hard copies of documents • filing locations • security • authorised access
Designated timelines	may include • timeline agreed with supervisor/person requiring spreadsheet • timeline agreed with internal/external client • organisation timeline eg deadline requirements
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of designing and developing complex business documents • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ◦ demonstrate knowledge and application of complex software functions
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ◦ Nil • This unit must be assessed in conjunction with the following unit(s) ◦ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units ◦ BSBADM304A Design and develop text documents ◦ BSBADM506A Manage business document design and development
Required knowledge and skills	• Required 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 ◦ Advanced functions of word processing and/or desktop publishing software applications ◦ Impact of formatting and design on the presentation and readability of documents ◦ Organisational policies and procedures • Required skills ◦ Literacy skills to interpret and evaluate the purposes and objectives of various types of software; consider aspects of context, purpose and audience when generating and formatting texts; display logical organisation of written information through the use of coherently linked paragraphs; use a variety of strategies for planning and reviewing own work; demonstrate drafting techniques; use simple and complex syntactic structures; select vocabulary to create nuances of meaning in particular contexts ◦ Proofreading and editing skills to ensure clarity of meaning and conformity to organisational requirements; check for accuracy and consistency of information by consulting additional resources ◦ Problem solving skills to use processes flexibly and interchangeably ◦ Numeracy skills to collate and collect data; graphs and annotated references ◦ Communication skills to follow complex oral instructions when using technology; listen to and interpret complex sequenced instructions ◦ Keyboarding skills ◦ ability to relate to people from a range of social, cultural and ethnic

	backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace which may include - workplace references such as computer user manuals, organisational policies and procedures and workplace procedure manuals - computer equipment including relevant software, printer - guide/example of 'house style' - equipment, eg, paper and other materials - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	In order to achieve consistency in 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 for assessment	- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and 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 - 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 for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To determine document requirements • Communicating ideas and information - Through well-designed business documents • Planning and organising activities - To meet designated timelines • Working with teams and others - To determine document purpose and audience • Using mathematical ideas and techniques - To determine design requirements • Solving problems - Using manuals and on-line help • Using technology - To produce complex business documents Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM405A	ORGANISE MEETINGS
ADM	General administration

DESCRIPTION: This unit covers organising meetings including agendas, papers, participant and minutes

ELEMENT	PERFORMANCE CRITERIA
1 Make meeting arrangements	1.1 The type of meeting and purpose are identified 1.2 Any legal or ethical requirements are identified and complied with 1.3 Requirements of meeting and participants are identified 1.4 Meeting arrangements are made in accordance with requirements of meeting 1.5 Participants are advised of any changes to original meeting details
2 Prepare documentation for meetings	2.1 Notice of meeting, agenda and meeting papers are prepared in accordance with meeting requirements 2.2 Documentation is checked for accuracy and any errors are corrected 2.3 Documentation is dispatched to participants within designated timelines 2.4 spare sets of documents are prepared
3 Record and produce minutes of meetings	3.1 Notes are taken with the required degree of speed and accuracy to ensure an accurate record of the meeting 3.2 Minutes are produced that reflect a true and accurate account of the meeting 3.3 Minutes are checked for accuracy and submitted for approval by the nominated person 3.4 Copies of minutes are dispatched within designated timelines

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Type of meeting	may include • face-to-face • teleconference • videoconference • annual general meeting • board meeting • staff meeting
Legal and ethical requirements	may include • requirements for public meetings • codes of practice • legislation relating to companies, associations etc
Meeting requirements	may include • purpose of the meeting • meeting structure • voting procedures • number of participants • special needs of participants • specific resources and equipment required by participants, eg, video projectors • telephone or videoconferencing equipment • teleconferencing or videoconferencing meeting protocols
Meeting arrangements	may include • scheduling the date and time for the meeting • booking an appropriate venue • organising catering • organising accommodation and transport • organising appropriate communication technology

	• establishing costs and operating within a budget • preparing relevant documentation for participants
Meeting style and structure	may include • formal • informal • semi-formal • structured • self-managed
Agenda	may include • statement of the meeting's purpose • date, time and location of meeting • welcome • minutes of the previous meeting • matters or business arising from the meeting • correspondence • reports • major agenda items • general business • date of next meeting
Meeting papers	may include • financial reports • chairperson's report • research reports • itemised meeting papers • draft documentation • correspondence • committee reports • minutes of previous meeting
Notes	may include • record of participants who were present at or absent from the meeting (attendees and apologies) • points discussed at the meeting • suggestions made at the meeting • issues raised at the meeting • decisions taken at the meeting • action items • formal motions • future action • arrangements for next meeting
Minutes	may include • using previous minutes to determine required format • using organisation templates

	• meeting details ○ title ○ date ○ time ○ location • welcome • names of absent and attending participants • apologies • approval of the record of the previous minutes • matters arising from the previous meetings • correspondence • agenda items • reports • other business • date of the next meeting • lists rather than complete sentences
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspect of evidence to be considered	- Assessment must confirm sufficient knowledge for organising meetings - Assessment of performance should be over a period of time covering all categories from the range statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate knowledge of meeting procedure/protocols for different types and modes of meeting - identify issues for minutes from general discussion
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBADM307A Organise schedule - BSBADM502A Manage meetings - BSBADM406A Organise business travel
Required knowledge and skills	- Required 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 - Policies and procedures in regard to meetings, agenda and minute-taking - Meeting terminology - Meeting structures - Meeting arrangements - Minute format - Agenda format - Required skills - Literacy skills to write and compile agenda items and record minutes; make notes from spoken texts in meetings; use a variety of strategies for planning, reviewing and proofreading documentation - Communication skills to co-ordinate and consult with participants; orally present written reports with a number of defined sections; clarify points made in meetings - Research skills to select categories by which to organise information and assess information for relevance, accuracy - Time-management skills to allow sufficient time to prepare for and conduct meetings - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace which may include - reference material in regard to meeting venues, catering

	▪ companies, transport suppliers ▪ names and contacts for meeting participants ▪ office supplies and equipment ▪ equipment, eg, computer and software, meeting technology • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To prepare meeting papers • Communicating ideas and information - Through accurate minutes • Planning and organising activities - To set up agendas and organise meetings • Working with teams and others - To confirm accuracy of minutes • Using mathematical ideas and techniques - To sequence and number sections and subsections in agendas and minutes • Solving problems - To check documents and minutes for accuracy • Using technology - To organise meetings and record minutes if required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM406A	ORGANISE BUSINESS TRAVEL
ADM	General administration

DESCRIPTION: This unit covers organising domestic and overseas business trips and associated itineraries and making travel arrangements.

ELEMENT	PERFORMANCE CRITERIA
1 Organise business itinerary for domestic and overseas travel	1.1 Purpose of domestic and overseas travel, budgets, meeting requirements and traveller preferences are confirmed 1.2 Points of contact and names of contact persons are identified and arrangements for meetings are made and confirmed in accordance with planned itinerary 1.3 Daily itineraries are prepared with appointments, arrival and departure times, accommodation and other details in accordance with travel purpose 1.4 Documents and support material for meetings are sourced and prepared within designated timelines 1.5 Itinerary is prepared in accordance with meeting requirements, travel demands and occupational health and safety requirements for the traveller 1.6 Itinerary and meeting documents are dispatched to the traveller within designated timelines
2 Make travel arrangements	2.1 Bookings are made in accordance with organisational policies and procedures for business travel 2.2 Travel documents are identified and arranged in accordance with itinerary and individual requirements 2.3 Travel arrangements are confirmed and confirmation documents checked and dispatched to the traveller within designated timelines 2.4 Alternative arrangements are negotiated and confirmed in response to changed requirements 2.5 Travel details and itinerary are recorded in accordance with organisational requirements 2.6 Communication arrangements are negotiated and confirmed in accordance with organisational requirements
3 Arrange credit facilities	3.1 Methods of payment are checked and confirmed 3.2 Credit arrangements are made in accordance with organisational policy and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Travel demands	may include • mode of travel • class of travel • transport timetables • connections and transfers • time differences • budget • available accommodation • class of accommodation • time management
Other itinerary details	may include • daily itinerary details ○ transport arrangements ○ arrangements for meals ○ required documentation for each appointment ○ contact names and numbers of all personnel involved ○ suggested leisure activities
Material for meetings	may include • overhead transparencies • electronic presentations • promotional brochures • product samples • catalogues • work completed for the client • product prototypes/samples • business proposals • tenders • reports • contracts • meeting papers

	• presentation kits • office supplies • information technology, eg, laptop, computer software • telecommunication equipment, eg, mobile phone, teleconferencing equipment
Traveller Occupational Health and Safety	may include • time between appointments • limit on total appointments in any one day • travelling time to reach venues • time for connections and transfers • limit on total amount of travel per day • rest periods • lunch breaks • leisure time
Bookings	may include • on line • telephone • travel agent
Travel documents	may include • passport • visa/s • insurance • health/medical documents • travel itinerary • timetables • maps • accommodation guides • travel vouchers • business schedule • meeting agenda and other documents • list of contacts
Confirmation documents	may include • e-ticket • paper ticket/s • travel vouchers • electronic or printed air-line itinerary • accommodation confirmation email, facsimile or letter • travel agent itinerary
Recording travel details	may include • separate file for each business trip • individual travel file for each key aspect of the trip • using a prepared checklist

	• using the organisation's standard checklist • using a diary
Communication arrangements	may include • points of contact • mobile access • email and facsimile access
Methods of payment	may include • accounts established with the organisation • purchase order • company credit cards • traveller pays and is reimbursed at a later date • the organisation provides the traveller with a cash advance • special arrangement made between the organisation and individual suppliers
Credit arrangements	may include • cab charge • debit/credit cards • currency • traveller's cheques • electronic transfer
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge for organising domestic and overseas business trips and associated itineraries and making travel arrangements - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate arrangements meet the requirements and preferences of the traveller and the organisation
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBADM307A Organise schedules - BSBADM405A Organise meetings
Required knowledge and skills	- Required 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 - Policies and procedures regarding travel - Internet/websites - Itinerary formatting and preparation - Filing systems - Checklist systems - Booking procedures - Sources of relevant documents and support material - Required skills - Literacy skills to read a variety of texts, eg, policy and procedures, travel timetables, conference brochures; write clear and detailed instructions in logical sequence - Research skills to locate specific information regarding appropriate transport, meeting venues, accommodation, contacts, etc; analyse and summarise data to produce schedule/itinerary/report - Communication skills to participate effectively in spoken interactions; listen to detailed oral instructions; question to clarify and evaluate information; offer opinion on information gathered from a variety of sources - Time management skills to allow sufficient time to prepare business and travel documentation - Problem-solving skills to choose appropriate solution from a range of available solutions - Numeracy skills for estimating time and planning; interprets, comparing and calculating with money - Technology skills to access the Internet and make on-line bookings

	○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace which may include ▪ policies and procedures regarding travel ▪ timetables and forms ▪ reference material, such as accommodation and transport suppliers ▪ calendar ▪ appointment books, diaries and other recording systems ▪ preferred suppliers and contact details ▪ maps ▪ credit facilities • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 • Assessment of performance requirements in this unit should be taken in an actual workplace or simulated environment • Assessment should reinforce the integration of the key competencies and common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this level

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify travel requirements • Communicating ideas and information - To negotiate meeting times and travel arrangements • Planning and organising activities - To arrange meetings and itineraries • Working with teams and others - To coordinate arrangements • Using mathematical ideas and techniques - For timetable planning and time management • Solving problems - To find alternative solutions for changed requirements • Using technology - To make on-line bookings and record travel arrangements Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM502A	MANAGE MEETINGS
ADM	General administration

DESCRIPTION: This unit covers managing the preparation of meetings, chairing the meetings, organising the minutes and reporting outcomes.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare for meetings	1.1 Purpose of meeting is clarified and the agenda developed in line with stated purpose 1.2 The style and structure of the meeting is appropriate to the meeting's purpose 1.3 Meeting participants are identified and notified in accordance with organisational procedures 1.4 Meeting arrangements are confirmed in accordance with requirements of meeting 1.5 Meeting papers are dispatched to participants within designated timelines
2 Conduct meetings	2.1 Meetings are chaired in accordance with organisational requirements, agreed conventions for the type of meeting and legal and ethical requirements 2.2 Meetings are conducted to ensure they are focused and time efficient 2.3 Meeting facilitation enables participation, discussion, problem solving and resolution of issues 2.4 Minute taker is briefed on recording meeting notes in accordance with organisational requirements and conventions for the type of meeting
3 Follow up meetings	3.1 Transcribed meeting notes are checked to ensure they reflect a true and accurate record of the meeting and are formatted in accordance with organisational procedures and meeting conventions 3.2 Minutes and other follow-up documentation are distributed within designated timelines and stored in accordance with organisational requirements 3.3 Outcomes of meetings are reported as required, within the designated timelines

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, code 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
Agendas	may include • statement of the meeting's purpose • date, time and location of meeting • welcome • minutes of the previous meeting • matters or business arising from the minutes • correspondence • reports • major agenda items • general business • date of the next meeting
Meeting purpose	may include • range of business items • setting of enterprise/team goals • planning and development of project • discussion forum for internal/external clients
Meeting arrangements	may include • scheduling the date and time for the meeting • booking an appropriate venue • recording of meeting • organising catering • organising accommodation and transport • organising appropriate communication technology • establishing costs and operating within budget • preparing relevant documentation for participants • organising a minute taker
Meeting papers	may include

	• notice of meeting • agenda • previous minutes • financial reports • chairperson's report • research reports • itemised meeting papers • draft documentation • correspondence
Designated timelines	may include • time frame decided by participants • formal time frame set by the organisation • informal time frame set by the administrative organiser • project timelines • contractual obligations • statutory requirements, eg, for annual general meetings
Meeting conventions	may include • quorum requirements • informal discussion • waiting to be recognised by the chairperson • speaking through the chairperson • restricting discussion to agenda items • time limit on speakers • moving and seconding formal motions • voting procedures • conflict of interest provisions • consensus required • majority of members to agree • casting vote for chairperson
Legal and ethical requirements	may include • requirements for public meetings • codes of practice • legislation relating to companies, associations etc
Resolution	may include • agreeing on a course of action • deferring decisions to another meeting
Minutes	may include • formatting from previous minutes • organisation templates • meeting details ○ title ○ date

	○ time ○ location • welcome • names of absent and attending participants • apologies • approval of the record of previous minutes • matters arising from the previous meetings • correspondence • agenda items • reports • other business • date of the next meeting • action items • lists rather than complete sentences
Naming and storage of documents	may include • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date etc • file names according to organisational procedures, eg, numbers rather than names • electronic storage in folders, sub-folders, hard/floppy disk drives, CD ROM, tape backup • organisation policy for backing up files • organisation for filing hard copies of documents • filing locations • security • authorised access
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of managing the preparation of meetings, chairing the meetings, organising the minutes and reporting outcomes • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate knowledge of conventions and procedures for both formal and informal meetings ○ delegate tasks to staff with relevant skills
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction the following unit(s) ○ BSBADM405A Organise meetings ○ BSBADM503A Plan and manage conferences
Required knowledge and skills	• Required 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 ○ The organisation's procedures and policies in regard to meetings, chairing and minute-taking ○ Meeting terminology, structures and arrangements ○ Minute-taking format ○ Agenda format ○ Chairing format ○ The organisation's record and circulation systems ○ Group dynamics • Required skills ○ Literacy skills to express complex relationships between ideas and purposes ○ Report-writing skills to select categories by which to organise information, and assess information for relevance and accuracy; identify and elaborate on key agenda items; source additional information as required ○ Communication skills to take part in sustained and complex interpersonal exchanges; interact with others; listen to and incorporate/encourage feedback; conduct oral presentations to a group; answer questions; manage and work with a group to construct an action plan; consult participants; chair meetings ○ Numeracy and time-management skills to allow sufficient time to prepare for meetings; make predictions; use developed estimating skills to check calculations and outcomes ○ Problem solving skills to choose appropriate solution from a range of available methods

	○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace which may include ▪ reference material in regard to meeting venues, catering, transport suppliers ▪ names and contacts for meeting participants ▪ office supplies and equipment ▪ computer and relevant software • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To develop agendas • Communicating ideas and information - Through effective chairing of meetings • Planning and organising activities - To organise meetings • Working with teams and others - To facilitate input to meetings • Using mathematical ideas and techniques - To manage time and meet designated timelines • Solving problems - To resolve issues • Using technology - To record and store minutes as required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM504A	PLAN OR REVIEW ADMINISTRATIVE SYSTEMS
ADM	General administration

DESCRIPTION: This unit covers the planning and/or the requirements of effective administration systems and procedures for implementing, monitoring and reviewing the system.

ELEMENT	PERFORMANCE CRITERIA
1 Plan or review administration systems	1.1 Requirements of, or modifications to the administration system are identified through consultation with system users and other stakeholders in accordance with organisational and budgetary requirements 1.2 Quotations from suppliers or developers of system are obtained in accordance with organisational policy and procedures 1.3 Selection of supplier or developer is made in accordance with organisational policy and procedures
2 Implement new or modified administration system	2.1 Implementation strategies are identified and developed in consultation with staff 2.2 Staff are encouraged to participate at all stages of the implementation process 2.3 System is implemented in accordance with organisational requirements 2.4 Procedures for using the system are defined and communicated to staff 2.5 Training and support is provided for staff on the use of the new or modified system 2.6 Contingencies are dealt with to ensure minimal effect on users
3 Monitor administration system	3.1 System is monitored for usage, security and output in accordance with organisational requirements 3.2 System is modified to meet changing needs in accordance with organisational requirements 3.3 Further modifications are clearly identified and users are notified 3.4 Staff training needs are monitored and new staff trained on administration system

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
System requirements	may include • components of the system • type of system • size of system • work practices • organisation/staff requirements • number and type of users • purpose and nature of the organisation • purpose and nature of system • skills of existing staff • staff training needs
Administration system	may include • paper-based system • electronic system
System users	may include • the organisation's personnel • casual personnel • external clients
Suppliers/developers	may include • internal staff/clients • administration systems consultants • information technology technicians • efficiency consultants • computer/software suppliers • information technology trainers • office equipment suppliers

Implementation strategies	may include • testing • trialling • temporary reduction of work load • boosting staff confidence • team goal setting • changing team/organisational culture • re-defining staff roles • re-distributing office tasks • change management strategies • providing staff training/information sessions • external consultants • modifying system • informing relevant persons • ensuring systems functions correctly
Communication strategies	may include • internal newsletter • meetings • training days • professional development time • office memorandum • facsimile messages • email messages • photocopied instructions
Training for staff	may include • professional development • on the job trainers • videos • on-line tutorials • training handbooks • coach, mentor and/or buddy systems • skills assessment
Contingencies	may include • temporary reduction of work output • loss of staff confidence • need for additional training • need to modify system
Monitoring of a system	may include • feedback from internal/external clients • observation of trained technician(s) • extra administrative support and back-up • utilising monitoring tools and processes

Security	may include • safeguards against computer viruses • passwords • confidentiality agreements
Changing needs	may include • growth or decline in the size of system • change in the nature and purpose of the system/organisation • technological advances in administrative systems • change in user requirements
Further modifications	may relate to • specialised software • additional equipment, training • redefinition of administrative roles and duties • negotiation of timeframes for system implementation
Monitoring staff training needs	may include • ongoing assessment of staff skills • ongoing feedback opportunities • providing professional development opportunities
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge planning and/or the requirements of effective administration systems • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ◦ demonstrate the administration system meets the organisation's requirements as identified
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ◦ Nil • This unit must be assessed in conjunction with the following unit(s) ◦ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ◦ Nil
Required knowledge and skills	• Required 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 ◦ The organisation's policies and procedures in regard to administrative systems and procedures, training of staff, monitoring and review of systems and administrative expenditure ◦ Financial/budgetary arrangements ◦ Planning tools and resources ◦ Monitoring/reviewing tools and resources • Required skills ◦ Literacy skills to follow and interpret the organisation's policies and procedures; write detailed procedural text, including alternative courses of action, after defining needs of audiences and purposes of information; follow complex flow chart in order to identify and distil relevant information ◦ Research and report writing: skills to assemble evidence and evaluate for accuracy and relevance; summarises data in logically coherent structures; use a variety of strategies for planning, reviewing and proof-reading own writing ◦ Problem-solving skills to choose appropriate solutions from a range of possible solutions; use processes flexibly and interchangeably; anticipate problems and modify systems accordingly ◦ Communication skills to consult and negotiate with consultants and staff; recommend alternative ways of completing tasks; discuss changes in routines and procedures; monitor and define objectives ◦ Time-management skills using a range of planning tools to implement system smoothly and with a minimum of disruption; anticipate modifications and plan system overhauls; allow sufficient time for training

	○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace which may include ▪ organisation policy and procedure manuals ▪ reference materials ▪ appropriate equipment ▪ contact persons, eg, trainers, technicians, suppliers ▪ budget • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	3	2	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To determine the organisation's requirements for an administrative system • Communicating ideas and information - To suppliers/system developers • Planning and organising activities - To implement the administrative system • Working with teams and others - To determine staff training needs • Using mathematical ideas and techniques - To select supplier's quotation • Solving problems - To deal with contingencies • Using technology - As the basis of, or support for the administrative system Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM506A	MANAGE BUSINESS DOCUMENT DESIGN AND DEVELOPMENT
ADM	General administration

DESCRIPTION: This unit covers setting standards for organisational documents and managing document design and production to meet standards.

ELEMENT	PERFORMANCE CRITERIA
1 Establish documentation standards	1.1 Organisational requirements for information entry, storage, output, and quality of document design/production are identified 1.2 The organisation's present and future information technology capability is evaluated in terms of its effect on document design and production 1.3 The types of documents used/required by the organisation are identified 1.4 Documentation standards are established for organisational documents in accordance with information, budgetary and technology requirements
2 Manage template design and development	2.1 Standard formats/templates suit the purpose, audience and information requirements for each document 2.2 Document templates enhance readability and appearance and meet the organisational requirements for style and layout 2.3 Templates are tested, organisational and user feedback is obtained and amendments are made as necessary to ensure maximum efficiency and quality of presentation
3 Develop standard text for documents	3.1 Complex technical functions of software are evaluated for their usefulness in automating aspects of standard documentation production 3.2 Requirements of each document are matched with software functions to allow efficient production of documents 3.3 Macros are tested to ensure they meet the requirements of each document in accordance with documentation standards
4 Develop and implement strategies to ensure the use of standard documentation	4.1 Explanatory notes are prepared for the use of standard templates and macros using content, format and language style to suit existing and future users 4.2 Training on the use of standard templates and macros is developed and implemented, adjusting the content and level of detail to suit the user needs 4.3 Master files and print copies of templates and macros are produced, circulated, named and stored in accordance with organisational procedures
5 Develop and implement strategies for maintenance and continuous improvement of standard documentation	5.1 Use of standard documentation templates and macros is monitored and the quality of documents produced is evaluated against documentation standards 5.2 Documentation standards are reviewed against the changing needs of the organisation, and improvements planned and implemented in accordance with organisational procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Standards for document design/production	may include • enterprise templates/house style, margins, fonts, usage of colour • language/style of document • enterprise policies and procedures • client requirements • quality standards • print quality • use of page layout software • colour photocopying • binding media • final document presentation • production of multiple/subsequent copies • electronic/paper-based
Document design/production tasks	may include • drafting • locating/gathering appropriate information/precedents • writing • drawing • production of graphics • liaison with external personnel • editing • formatting • checking final print copy • printing • binding • copying • creation of templates, style/procedures manual
Complex technical functions	may include • table of contents • index

	• importing • exporting • linking • embedding • merge criteria • fields • form fields • formulae • sort criteria • macros • display features • data transfer
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of setting standards for organisational documents and managing document design and production - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate knowledge and application of complex software functions - demonstrate knowledge of advanced document design principles - implement production of effective user manuals
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBADM402A Produce complex business documents
Required knowledge and skills	- Required 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 - Organisational policies and procedures - Computer hardware and software - Document production processes - Cost constraints - Available external expertise if required - Various storage media - Required skills - Literacy skills to read and interpret policies and procedures; review and select technological designs; consider aspects of context, purpose and audience when designing and formatting texts - Research and analysis skills to evaluate content, structure and purpose of technical texts; adapt task instructions to suit changes in technology - Technological skills to manage design requirements and layouts - Communication skills to present complex instructions orally; communicate ideas logically; explain technological concepts and designs to others - Keyboarding - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace which may include - computer hardware and other document production

	▪ equipment ▪ a range of software applications appropriate to the task ▪ media for production of documents • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	3	2	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To determine organisational needs • Communicating ideas and information - Orally and in writing to introduce users to documentation standards • Planning and organising activities - To implement and monitor documentation standards • Working with teams and others - To gain feedback on documentation templates • Using mathematical ideas and techniques - To work within budgetary constraints • Solving problems - To maximise design features of macros and templates • Using technology - To design and store standard documentation Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM105A	USE BUSINESS EQUIPMENT
ADM	General administration

DESCRIPTION: This unit covers the skills and knowledge required to choose resources to complete a variety of tasks under direct supervision and includes operating equipment, undertaking routine maintenance and reporting faults to the appropriate person.

ELEMENT	PERFORMANCE CRITERIA
1 Select equipment/resources	1.1 Business equipment or resources required to complete task are identified and accessed under direct instructions 1.2 Quantities and resources are correctly estimated to complete the task 1.3 Equipment is checked for serviceability in accordance with equipment instructions
2 Operate equipment	2.1 Equipment is operated in accordance with manufacturer's instructions and under direct instructions 2.2 Equipment faults are accurately identified and action taken to ensure equipment is repaired in accordance with manufacturer's instructions 2.3 Repairs outside area of operator's responsibility are reported to appropriate persons
3 Maintain equipment/resources	3.1 Equipment/resources to support completion of tasks are maintained under direct instructions 3.2 Maintenance is undertaken to ensure equipment meets manufacturer's specifications 3.3 Records concerning equipment/resources are maintained under direct instructions 3.4 Equipment and resources are stored under direct instructions

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti-discrimination and diversity • relevant industry codes of practice
Business equipment	may include • photocopier • printer • binder • answering machine • fax machine • telephone
Business resources	may include • facilities • equipment • human resources • Occupational Health and Safety resources • stock and supplies
Equipment instructions	may include • manufacturers guidelines • procedures manual • Occupational Health and Safety guidelines and procedures • training notes
Organisational requirements	may be included in • goals, objectives, plans, systems and processes • legal and organisation policy/guidelines and requirements • business and performance plans • confidentiality and security requirements • access and equity principles and practice • ethical standards • Occupational Health and Safety policies, procedures and programs

	defined resource parameters
Appropriate persons	may include - supervisor - colleagues - external organisations - line management
Maintenance	may include - adding toner - cleaning equipment regularly - replacing paper - clearing paper jams - organising service calls
Records	may include - equipment service call forms - service repair forms - purchase orders - warranties
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to choose resources to complete a variety of tasks under direct supervision • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ provide evidence of listening carefully and following instructions on how to select and operate equipment ○ undertake routine maintenance while following instructions in accordance with operating manual ○ communicate faults and/or risks to appropriate people
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN205A Use business technology
Required knowledge and skills	• Required knowledge ○ Relevant legislation from all levels of government which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti-discrimination and diversity ○ Relevant industry codes of practice ○ Knowledge of the organisation's policies, plans and procedures that relate to the use of business equipment ○ Understanding the functions of a range of business equipment ○ Knowledge of the correct shut-down procedures for a range of business equipment ○ Knowledge of common equipment faults ○ Knowledge of routine maintenance procedures • Required Skills ○ Literacy skills to identify work requirements and process basic, relevant workplace documentation ○ Communication skills to identify lines of communication, request advice, effectively question, follow instructions, receive feedback and report equipment faults ○ Problem solving skills to solve routine problems related to business equipment and to determine appropriate fault repair actions while under direct supervision ○ Technology skills to use business equipment under direction ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ business equipment ○ appropriate documentation and resources normally used in the workplace

	- Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 - Assessment of performance requirements in this unit should be undertaken in actual workplace or simulated environment - Assessment should reinforce the integration of the key competencies and common Competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify resource needs • Communicating ideas and information - To collect information • Planning and organising activities - To complete a task • Working with teams and others - To complete scheduled tasks • Using mathematical ideas and techniques - As an aid to measure and schedule tasks • Solving problems - To identify equipment faults • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN205A	USE BUSINESS TECHNOLOGY
ADM	General administration

DESCRIPTION: This unit covers the skills and knowledge required to select, use, and maintain business technology. This technology includes the effective use of computer software to organise information and data.

ELEMENT	PERFORMANCE CRITERIA
1 Select and use technology	1.1 Appropriate technology and software applications are selected to achieve the requirements of the task 1.2 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user 1.3 Technology is used according to organisational requirements and in a way which promotes a safe work environment
2 Process and organise data	2.1 Files and records are identified, opened, generated or amended according to task and organisational requirements 2.2 Input devices are operated according to organisational requirements 2.3 Data is stored appropriately and applications are exited without damage to or loss of data 2.4 Manuals, training booklets and/or on-line help or help-desks are used to overcome basic difficulties with applications
3 Maintain technology	3.1 Used technology consumables are identified and replaced in accordance with manufacturer's requirements 3.2 Routine maintenance is carried out and/or arranged in order to ensure that equipment is maintained in accordance with manufacturer's instructions and organisational requirements 3.3 Equipment faults are accurately identified and action taken in accordance with manufacturer's instructions or by reporting fault to designated person

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Technology	may include • computer technology, such as laptops and Personal Computers • digital cameras • zip drives • modems • scanners • printers
Software applications	may include • email, internet • word processing, spreadsheet, database, accounting or presentation packages
Organisational requirements	may relate to procedures including • log-on procedures • correctly identifying and opening files • locating data • saving and closing files • Occupational Health and Safety policies, procedures and programs • storing data • manufacturer's guidelines • legal and organisational policy/guidelines and requirements
Input devices	may include • keyboard • numerical key pad • mouse • scanner

Storage of data	may include • storage in directories and sub-directories • storage on CD-ROMs, hard and floppy disk drives or back up systems • appropriate storage/filing of hard copies of computer generated documents
Technology consumables	may include • printer ribbons and cartridges • CD-ROM • zip drives • print heads • floppy disks • toner cartridges • backup tapes
Routine maintenance	may include • regular checking of equipment • replacing consumables • 'in-house' cleaning and servicing of equipment according to manufacturer's guidelines • periodic servicing by qualified or manufacturer approved technician
Equipment faults or problems	may be identified or anticipated by • routine checking of equipment • preparation of a maintenance program • encouraging feedback from work colleagues • regular back-ups of data • keeping a log book of detected faults • regular Occupational Health and Safety inspections • checking that repairs have been carried out
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to select, use and maintain business technology • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability ○ for selection and application of functional software applications to produce workplace documents ○ demonstrate application of Occupational Health and Safety procedures for set up of workstation, operation of computer, changing toner cartridges and other work with plant and substances ○ access, retrieval and storage of required data
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This units must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN307A Maintain business resources
Required knowledge and skills	• Required 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 ○ The organisation's policies, plans and procedures, especially in regard to file-naming and storage conventions ○ The correct log-on and shut-down procedures for computer equipment ○ Organisational Information Technology procedures including back-up and virus protection procedures ○ Basic technical terminology in relation to reading help-files and manuals ○ Methods of detecting faults in and solving problems with business technology • Required skills ○ Literacy skills to identify work requirements and understand and process basic, relevant workplace information; follow written instructions ○ Communication skills to request advice, receive feedback and work with a team ○ Problem solving skills to solve routine problems ○ Keyboarding skills to produce basic workplace documents ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ technology consumables

	○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 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 in the Range Statement • Assessment must take account of the endorsed assessment guidelines • 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 common Competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To store and despatch information • Communicating ideas and information - With members of the work team • Planning and organising activities - For collating and filing information • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In filing information • Solving problems - To store and despatch information • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN206A	PROCESS AND MAINTAIN WORKPLACE INFORMATION
ADM	General administration

DESCRIPTION: This unit covers the skills and knowledge required to collect, process, store and maintain workplace information and its systems. It includes the maintenance of filing and record systems.

ELEMENT	PERFORMANCE CRITERIA
1 Collect information	1.1 Collection of information is timely and relevant to organisational needs 1.2 Business equipment/technology available in the work area is used to obtain information effectively 1.3 Organisational requirements relating to security and confidentiality are applied to information handling
2 Process workplace information	2.1 Business equipment/technology is used to process information in accordance with organisational requirements 2.2 Information is processed in accordance with defined timeframes, guidelines and procedures 2.3 Information is updated, modified and filed in accordance with organisational requirements 2.4 Information is collated and despatched in accordance with specified timeframes and organisational requirements
3 Maintain information systems	3.1 Information and filing systems are maintained in accordance with organisational requirements 3.2 Inactive or dead files are identified, removed and/or relocated in accordance with organisational requirements 3.3 New files are established and assembled in accordance with organisational requirements 3.4 Reference and index systems are updated in accordance with organisational requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Information	may include • correspondence ○ faxes ○ memos, ○ letters ○ emails • computer databases ○ library catalogue ○ customer records • computer files ○ letters ○ memos ○ other documents • sales records ○ monthly forecasts ○ targets achieved • forms ○ insurance forms ○ membership forms • invoices ○ from suppliers ○ to debtors • personnel records ○ personal details ○ salary rates • minutes of meetings
Business equipment/technology	may include • photocopier • computer • printer • binder • filing systems ○ manual ○ computerised

	○ electronic • answering machine • fax machine • telephone
Organisational requirements	may include • procedures for deciding which records should be captured and filed • security procedures • legal and organisation policy/guidelines and requirements • despatching and collecting procedures • procedures for updating records • Occupational Health and Safety policies, procedures and programs
Removing inactive or dead files	may include • transferring records from the active filing system to secondary storage • transferring files at regular intervals or routinely checking for dead or inactive files • periodically archive or delete files • compressing computer files prior to archiving
Relocation of information	may include • electronic ○ email ○ internet access ○ diskette, tape ○ CD-ROM • microfilm • printed material • photographic material
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge required to collect, process, store and maintain workplace information and its systems - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability - to show the application of organisational policies and procedures for collecting and processing workplace information - maintain accuracy in recording and documenting information - demonstrate the correct storage and classification of documents - demonstrate the maintenance of information records
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s): - Nil - This unit must be assessed in conjunction with the following unit(s): - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBCM305A Organise workplace information
Required knowledge and skills	- Required 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 and structure - Knowledge of the organisation's record keeping/filing systems and security procedures - Understanding organisational policies and procedures relating to collecting and processing workplace information - Required skills - Literacy skills to read and understand the organisation's record keeping and information (including classification) systems; follow sequenced written instructions; to comprehend/interpret nature of record content - Interpreting and applying relevant access and security rules and conditions - Planning skills to organise work priorities and arrangements - Problem solving skills to solve routine problems - Technology skills including the ability to select and use technology appropriate to a task - Communication skills including reporting of information - Numeracy skills in relation to sequencing and indexing files - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - business equipment and technology - appropriate documentation and resources normally used in the workplace

	- Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 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 Statements - Assessment must take account of the endorsed assessment guidelines - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To store and despatch information • Communicating ideas and information - With members of the work team • Planning and organising activities - For collating and filing information • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In filing information • Solving problems - To store and despatch information • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN212A	HANDLE MAIL
ADM	General administration

DESCRIPTION: The unit is based on and equivalent to BSAINF101A and BSAINF201A (together) from BSA97 Administration Training Package (enhanced).

The unit covers receiving and distributing incoming mail, collecting and despatching outgoing mail, and organising and sending electronic mail.

ELEMENT	PERFORMANCE CRITERIA
1 Receive and distribute incoming mail	1.1 Incoming mail is checked and registered in accordance with organisational policy and procedures 1.2 Titles and locations of company personnel and departments are identified 1.3 Urgent and confidential mail is identified and distributed in accordance with organisational requirements 1.4 Mail is sorted and despatched to the nominated person/location in accordance with organisational requirements 1.5 Damaged, suspicious or missing items are recorded and/or reported in accordance with organisational policy and procedures
2 Receive and despatch outgoing mail	2.1 Outgoing mail is collected, checked and sorted to ensure all items are correctly prepared for despatch in accordance with organisational policy and procedures 2.2 Outgoing mail is recorded and processed for despatch in accordance with organisational requirements 2.3 Mail is despatched to meet designated timelines
3 Organise urgent and same day deliveries	3.1 Items are prepared for urgent delivery in accordance with organisational requirements and the carrier's specifications 3.2 Delivery options are evaluated and the best option for delivery is selected 3.3 Lodgement or pick up of emergency deliveries is organised and followed up if necessary
4 Organise and send electronic mail	4.1 Distribution lists are prepared/ maintained in accordance with organisational requirements 4.2 Mail message/s are checked for accuracy and any attachments are identified and prepared in accordance with organisational and service provider requirements 4.3 Outgoing mail is recorded/stored in accordance with organisational requirements 4.4 Mail is despatched to meet designated timelines

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, codes and national standards relevant to the workplace	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
Incoming mail	may include • paper based • electronic ○ faxes ○ emails to central address • internal • external • urgent • confidential/personal • letters • journals/magazines • other correspondence
Checking mail	may include • mail marked 'confidential', 'urgent' or 'personal' • mail sent "express post" or registered • mail that has been damaged • mail that looks suspicious • enclosures
Registering of mail	may include • the date received • the sender • the addressee • the subject • the contents, eg, cheque • assigning a file number • the condition of mail item, eg, damaged, no return address
Delivery of urgent and confidential mail	may include

	• separating and prioritising urgent mail • immediate, hand delivery, express post, registered
Sorting mail	may include • separating urgent mail to be distributed first • sorting by departments • sorting by location • sorting by seniority of personnel • separating internal (organisational) mail and external mail • separating by order of importance for each individual • separating junk mail • sorting invoices, cheques and accounts • adding a circulation slip
Nominated person/location	may include • department • individual addressee • administrative support person
Damaged, suspicious or missing items	may include • mail exposed to the weather, eg, water damage from rain • mail roughly handled, eg, broken contents, torn address labels • pilfered mail, eg, contents may be missing, parcels slit opened • mail that looks unusual • mail that makes noises • mail that smells strange • mail that looks like it has been interfered with (re-sealed mail)
Action in relation to damaged, missing or suspicious items	may include • contacting the sender to ensure everything sent was received • negotiating the replacement of missing or damaged items with the sender • filling out forms for the sender's insurance company • not touching or moving suspicious mail • calling the supervisor or security staff immediately
Correctly preparing mail items for despatch	may include • checking the address details and layout are correct • checking letter and envelope are addressed to same person • checking that the letter has been signed • checking enclosures • checking that the address is not obscured • checking that the return address is included • determining the most appropriate carrier • ensuring the correct requirements for the chosen carrier are being followed • preparing bulk mail outs

Mail records	may include • electronic ○ specialist software ○ database ○ spreadsheet systems • paper based ○ mail book ○ form ○ file
Processing mail for despatch	may include • calculating and paying for postage • registering mail • DX mail
Records of outgoing mail	may include • date of despatch • sender • sender's department • addressee/organisation • appropriate carrier ○ courier ○ normal mail ○ express post • reference number • receipts attached where appropriate
Delivery options	may include • express mail • overnight bag • courier
Best option	may be determined by • cost • time constraints • delivery location • nature of contents ○ bulky ○ fragile ○ confidential • quantity of delivery items
Distribution lists	may include • electronic address books • database or spreadsheet records

	word processing tables or data files
Maintenance of distribution lists	may include - deleting records - adding new records - updating records or deleting returned mail addresses
Checking electronic mail for accuracy	may include - spelling - grammar - punctuation - intended meaning
Preparing attachments	may include - checking that the file size will negotiate the Internet Service Provider gateway - separating large documents into a number of files - compressing files - preparing self-executable files
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge receiving and distributing incoming mail, collecting and despatching outgoing mail and organising and sending electronic mail • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate all elements of competency and their performance criteria ○ demonstrate knowledge of the organisation's policies and procedures relating to mail and electronic mail ○ demonstrate justification for choice of carrier for urgent and same day deliveries ○ demonstrate knowledge of carriers' requirements, eg, postal and courier
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN305A Organise workplace information
Required knowledge and skills	• Required 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 ○ Organisational structure ○ Titles, roles and locations of the organisation's personnel ○ Range of mail services available ○ Procedural requirements for receiving despatching and prioritising correspondence ○ Organisational policies and procedures that are specific to handling electronic mail • Required skills ○ Literacy skills to keep records, check accuracy of written material and follow policies and procedures ○ Numeracy skills for checking weights and addresses, sorting and collating and estimating time for mail despatches and bulk mail outs ○ Communication skills to receive instructions of several steps to complete task, give information to others and consult with or question supervisor and peers to clarify information ○ Computer/technology skills related to using electronic mail ○ Problem solving, eg, choosing appropriate delivery methods for urgent documents ○ Ability to relate to people from a range of social, cultural and

	ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	In order to achieve consistency in 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 for 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 - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To deal with incoming and outgoing mail • Communicating ideas and information - When organising couriers with other carriers • Planning and organising activities - To organise bulk mail despatch either electronically or paper-based • Working with teams and others - To collect and distribute mail • Using mathematical ideas and techniques - To estimate time and resources needed for bulk mailing • Solving problems - To identify the most appropriate and cost efficient option for urgent delivery • Using technology - To record incoming and outgoing mail if required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM305A	ORGANISE WORKPLACE INFORMATION
ADM	General administration

DESCRIPTION: This unit covers the skills and knowledge required to gather, organise and apply workplace information in the context of an organisation's work processes and information management systems.

ELEMENT	PERFORMANCE CRITERIA
1 Collect and assess information	1.1 Information held by the organisation on products and services is assessed for accuracy and relevance to organisational requirements 1.2 Methods of collecting information are reliable and make efficient use of available time and resources 1.3 Information collected is suitable for analysis, decision making and the development of plans, strategies and options 1.4 Information collection is participative and uses appropriate interpersonal skills to access relevant data from individuals and team members 1.5 Appropriate interpersonal skills are used to access relevant information from individuals and teams
2 Organise information	2.1 Information is organised in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements 2.2 Business equipment/technology is used to maintain information in accordance with organisational requirements 2.3 Information and materials are collated and communicated to relevant designated persons 2.4 Difficulties organising and accessing information are identified and solved collaboratively with individuals and team members 2.5 Information is updated and stored in accordance with organisational requirements
3 Review information needs	3.1 Feedback on sufficiency of information is actively sought to ensure relevance of information in accordance with organisational requirements 3.2 Contribution of information to decision-making is reviewed and appropriate modifications to collections processes are implemented 3.3 Future information needs are identified and incorporated in modifications to collection processes 3.4 Future information needs are documented and incorporated in modifications to reporting processes

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Information held by the organisation	may include • correspondence ○ faxes ○ memos ○ letters ○ email • computer databases ○ library catalogue ○ customer records • computer files ○ letters ○ memos ○ other documents • sales records ○ monthly forecasts ○ targets achieved • forms ○ insurance forms ○ membership forms • invoices ○ from suppliers ○ to debtors • personnel records ○ personal details ○ salary rates • financial figures • production targets
Organisational requirements	may include • quality assurance and/or procedures manuals • security and confidentiality requirements • legal and organisational policy/guidelines and requirements • management and accountability channels • Code of Conduct/Code of Ethics • procedures for updating records

	• Occupational Health and Safety policies, procedures and programs • information protocols
Methods used to collect information	may include • interviews with colleagues/customers • recruitment applications and other forms • classification tools • information from other organisations • previous file records • observation and listening • checking written material including referrals and client files • questioning (in person or indirect) • individual research • checking research provided by others
Interpersonal skills	may include • using appropriate body language • summarising and paraphrasing • networking • consultation methods, techniques and protocols • seeking feedback from group members to confirm understanding
Suitable format of information	may include • using tables and charts • using a particular software application • incorporating graphics and pictures • adding headers and footers • use of legends • inserting symbols
Business equipment/technology	may include • photocopier • computer • email • internet/extranet/intranet • shredder • answering machine • fax machine • telephone
Designated persons	may include • supervisor • clients • colleagues • external agencies • committee • line management

	statutory bodies
Feedback on sufficiency of information could be obtained	from - customer satisfaction questionnaires - audit documentation and reports - quality assurance data - returned goods - comments from clients and colleagues
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge required to gather, organise and apply workplace information in the context of an organisation's work processes and information management systems - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - provide accurate information for defined purposes - in maintaining and handling data and documents systematically - in checking and reviewing data for relevance and accuracy - present information and data clearly - for identifying and complying with organisational requirements - for using business technology to manage information
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBCM206A Process and maintain workplace information - BSBCM212A Handle mail - BSBCM405A Analyse and present research information - BSBCM306A Produce business documents
Required knowledge and skills	- Required 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 and structure - Knowledge of organisation's record keeping/filing systems and security procedures and safe recording practices - Knowledge of organisational policies and procedures relating to distribution of workplace information and legal and ethical obligations - Methods for checking that decisions are consistent with available information - Knowledge of safe record keeping procedures - Understanding methods for checking the validity of information and its sources - Knowledge of preparing and planning documentation - Principles of interpersonal communication - Required 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 ○ Planning skills to organise work priorities and arrangements ○ Problem solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate ○ Technology skills including the ability to select and use technology appropriate to a task; display information in a format suitable to the target audience ○ Writing and speaking skills to communicate advice and information effectively ○ Analytical skills to classify and report information ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ business equipment and technology ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 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 • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To store and despatch information • Communicating ideas and information - With members of the work team • Planning and organising activities - For collating and filing information • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In filing information • Solving problems - To store and despatch information • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN307A	MAINTAIN BUSINESS RESOURCES
ADM	General administration

DESCRIPTION: This unit covers the skills and knowledge required to determine, administer and maintain resources to complete a variety of tasks.

ELEMENT	PERFORMANCE CRITERIA
1 Advise on resource requirements	1.1 Estimates of future and present business resources are calculated in accordance with organisational requirements 1.2 Advice is clear, concise and relevant to achievement of organisational requirements 1.3 Information is provided on the most economical and effective choice of equipment, materials and suppliers 1.4 Resource shortages and possible impact on operations are identified
2 Monitor equipment/resource usage and maintenance	2.1 Resource handling is in accordance with established organisational requirements including Occupational Health and Safety requirements 2.2 Business technology is used to monitor and identify the effective use of equipment and resources 2.3 Consultation with individuals and teams is used to facilitate effective decision making on the appropriate allocation of resources 2.4 Relevant policies regarding resource use are identified and adhered to in the performance of operational tasks 2.5 Resource usage is routinely monitored and compared with estimate requirements in budget plans
3 Acquire resources	3.1 Acquisition and storage of resources is in accordance with organisational requirements 3.2 Acquisition of resources is cost effective and consistent with organisational timelines 3.3 Resources are acquired within available timelines to meet identified requirements 3.4 Resource acquisition processes are reviewed to identify improvements in future resource acquisitions

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 improvements 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be collected	• Assessment must confirm sufficient knowledge required to determine, administer and maintain resources to complete a variety of tasks • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ collect and record data on resource use ○ observe resource use over defined and operational timeframes ○ Preparing reports to advise on resource needs ○ access resources to maintain operations in line with requirement outcomes ○ undertake routine maintenance
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN205A Use business technology ○ BSBCMN406A Maintain business technology ○ BSBCMN407A Coordinate business resources
Required knowledge and skills	• Required 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 • Required 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	• Physical resources - assessment of this competency requires access to

	○ business equipment ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 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 Statements • 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 Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	1	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify resource needs • Communicating ideas and information - With members of the work team • Planning and organising activities - For self • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - As an aid to measure and schedule tasks • Solving problems - To identify equipment faults • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN407A	COORDINATE BUSINESS RESOURCES
ADM	General administration

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Determine resource requirements	1.1 Resource requirements are determined in accordance with business and operational plans and organisational requirements 1.2 Opportunities are given to individuals and workgroups to contribute to the identification of resource requirements 1.3 Resource expenditure is realistic and makes efficient use of available budget resources 1.4 Recommendations on resource requirements are presented in the required format, style and structure using relevant business equipment and technology
2 Acquire and allocate resources	2.1 Physical resources and services are required in accordance with organisational requirements 2.2 Resources are checked to ensure quality and quantity in line with service agreements 2.3 Resources are allocated promptly to enable achievement of work group objectives 2.4 Consultation with individuals and teams on allocation of resources is participative and is conducted using appropriate interpersonal skills
3 Monitor and report on resource usage	3.1 The effectiveness of resource planning is measured and assessed against actual costs and identified shortfalls and surpluses 3.2 Methods of monitoring resource use are developed and implemented to enable timely and accurate reporting against business and operating plans 3.3 Improvements in resource planning are identified through consultation and feedback and implemented in accordance with organisational requirements 3.4 Records concerning equipment and resource purchases are maintained in accordance with organisational requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to determine and analyse existing and required resources, their effective application and the accountability for their use • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ monitor resource usage to determine resource needs ○ maintain records of resource requirements ○ identify and communicate faults and/or risks to appropriate people ○ calculate costs and expenditures ○ negotiate with others in relation to access to resources
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units ○ BSBCMN307A Maintain business resources ○ BSBCMN406A Maintain business technology
Required knowledge and skills	• Required 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 • Required 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	• Physical resources - assessment of this competency requires access to ○ business equipment and technology ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify resource needs • Communicating ideas and information - With members of the work team • Planning and organising activities - To coordinate resources • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - As an aid to estimate resource usage • Solving problems - To identify equipment faults • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

COACHING AND INSTRUCTION

Contents

SRXCAI001B Assist in preparing sport and recreation sessions for participants	1
SRXCAI002B Assist in conducting sport and recreation sessions for participants ...	7
SRXCAI003B Provide equipment for activities	14
SRXCAI004B Plan a session or program for participants.....	21
SRXCAI005B Conduct a sport and recreation session for participants	30
SRXCAI006B Organise a sport and recreation program	38
SRXCAI007B Conduct a sport and recreation program	46
SRXCAI008B Plan and prepare an individualised long-term training program	53
SRXCAI009B Conduct, monitor and adjust individualised long-term training programs.....	65
SRXCAI010B Evaluate, analyse and modify long-term and/or high performance individualised training programs	78
SRXCAI011B Plan and prepare for participants to meet the demands of high level participation.....	89
SRXCAI012B Conduct, monitor and adjust high performance individualised training programs.....	98

SRXCAI001B	ASSIST IN PREPARING SPORT AND RECREATION SESSIONS FOR PARTICIPANTS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to assist in the planning and preparation of sessions within the sport and recreation industry.

ELEMENT	PERFORMANCE CRITERIA
1 Collect information to plan a session	1.1 Identify sources of information 1.2 Gather as much relevant information as possible 1.3 Ensure information collected is as up-to-date and comprehensive as available sources allow 1.4 Clarify information points which are not clear with a responsible person 1.5 Respect participants' rights to confidentiality
2 Contribute suggestions towards planning for a session	2.1 Ensure suggestions are broadly in line with the aims of the session and participants for whom it is being planned 2.2 Ensure suggestions take into account health and safety requirements 2.3 Ensure suggestions take into account available time and resources 2.4 Offer suggestions positively and without prompting 2.5 Check suggestions and confirm with a responsible person before being implemented
3 Assist in making arrangements for a session	3.1 Implement arrangements allocated promptly, efficiently and as directed 3.2 Ensure communications are clear, accurate and contain relevant information 3.3 Implement arrangements within the role and the ensure the responsible person is promptly notified of any difficulties 3.4 Keep commitments made to others 3.5 Implement arrangements in a way which maintains the goodwill of all involved 3.6 Confirm final arrangements and work environment with the person responsible for the session

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Aims	[one categories] • to enable participation
Arrangements	[all categories] • equipment • access to facilities • providing advance information to participants • refreshments
Information	[all categories] • needs and interests of participants • numbers • ages and gender of participants • previous experience of participants • special requirements • basic rules or codes covering the activity including health and safety issues
Participants	[all categories] • experienced • inexperienced • adults • children • school or youth groups, tourists, club members and general public • variety of ethnic groups • clients with special needs
Session	[all categories] • a task, game, activity or exercise • may be a component of a sequenced program of individual sessions • for individuals or groups
Sources of information	[all categories] • participants • senior colleagues

Suggestions	[all categories] • content of activity • methods of working with participants • timing and sequencing of component parts of session
Work environment	[all categories] • varies with respect to ○ size of organisation ○ type of organisation ○ location ○ complexity ○ product/service range

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of personal roles and responsibilities in the preparation on sessions in the work environment • Assessment of performance should be over a period of time covering all categories of information, arrangements and sources of information and at least one category from the remaining Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ collect information to plan a session ○ contribute suggestions towards planning for a session ○ assist in making arrangements for a session
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ BSBCMN102A Complete daily work activities • This unit must be assessed in conjunction with the following unit(s) ○ BSBCMN101A Prepare for work in business ○ activity specific competencies in fitness, community recreation, sport or outdoor recreation where required • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI002B Assist in conducting sport and recreation sessions for participants ○ SRXCAI003B Provide equipment for activities
Required knowledge and skills	• Required knowledge ○ Range of information sources in order to access current information on sport and recreation session ○ Organisation's hierarchy and individual's responsibilities within the hierarchy ○ Basic health and safety requirements appropriate to the session ○ Knowledge of the time and resources available within the organisation for sport and recreation sessions ○ Organisation's policies and procedures with respect to the conduct of sessions • Required skills ○ Questioning skills in order to clarify client requirements from sport and recreations sessions in order for this information to be included in the planning process ○ Communication skills in order to offer suggestions during the planning process for sport and recreation sessions ○ Numeracy and literacy skills, as required, to make session arrangements
Resource implications	• Physical resources - assessment of this competency requires access ○ to a real work environment • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the

	○ relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Gathering information to plan a session, • Communicating ideas and information - Contributing suggestions towards planning, • Planning and organising activities - Assisting with making arrangements • Working with teams and others - Liaise with responsible personnel, support and assist personnel • Using mathematical ideas and techniques - Assisting with the planning of sessions • Solving problems - Taking into account problems with the organisation of sessions • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI002B	ASSIST IN CONDUCTING SPORT AND RECREATION SESSIONS FOR PARTICIPANTS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to assist in the conduct and supervision of sessions within the sport and recreation industry.

ELEMENT	PERFORMANCE CRITERIA
1 Assist in preparing participants	1.1 Present participants with a positive image of the staff in the work environment 1.2 Ensure clothing is safe and appropriate to the activity 1.3 Check aspects of the clients' dress or equipment which may be unsuitable with the responsible person running the session 1.4 Assist participants to understand rules, codes and organisational Occupational Health and Safety requirements 1.5 Assist participants to 'warm up' and prepare mentally for the activity 1.6 Ensure all communications are clear, accurate and appropriate to the participant 1.7 Communicate basic health and safety hazards promptly to participants and the responsible person 1.8 Refer situations and occurrences outside of the area of responsibility to the responsible person
2 Help participants gain skills, techniques and knowledge	2.1 Ensure learning methods are clear, appropriate to the participants and as directed 2.2 Provide participants with equal and adequate attention and deal with their queries and difficulties patiently 2.3 Motivate and encourage participants in a way which conforms to good practice in the activity 2.4 Carry out assigned duties as directed 2.5 Refer points of knowledge, skill or technique beyond own level of ability to the responsible person
3 Assist in supervising participants	3.1 Monitor participant's performance continuously 3.2 Motivate participants in a way which conforms to good practice in the activity 3.3 Remind participants of the technique and skill required by the responsible person 3.4 Remind participants of rules and codes as necessary 3.5 Refer situations and occurrences beyond own area of expertise and responsibility to the responsible person
4 Assist in preparing participants to end the session	4.1 Assist participants to 'cool down' 4.2 Check issued equipment for wear and tear and refer any problems detected to the responsible person 4.3 Encourage participants to provide feedback and identify further needs 4.4 Clearly explain practices for following sessions as directed 4.5 Explain to participants the time, location and content of future sessions
5 Assist in the evaluation of the	5.1 Ensure feedback accurately reflects the progress of the session 5.2 Include the views of participants in the feedback

session	5.3 Ensure suggestions highlight areas of possible improvement 5.4 Offer feedback and suggestions constructively 5.5 Identify areas where personal performance could be improved and agree on ways of obtaining this improvement

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Evaluation	[all categories] • aims and objectives • participant progress/behaviour • suitability and safety of facilities and equipment • content • structure and processes of the activity
Feedback and suggestions	[one categories] • are discussed with senior colleagues and participants
Learning methods	[all categories] • explanation • demonstration • participation
Participants	[two categories] • experienced • inexperienced • adults • children • school or youth groups, tourists, club members and general public • variety of ethnic groups • participants with special needs
Session	[all categories] • a task, game, activity or exercise • may be a component of a sequenced program of individual sessions • for individuals or groups
Work environment	[all categories] • varies with respect to ○ size of organisation ○ type of organisation ○ location ○ complexity

	○ product/service range

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of practices to assist in the conduct of sport and recreation sessions in the work environment • Assessment of performance should be over a period of time covering two categories of clients from the Range Statement and all categories from the remaining range statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ assist in preparing participants ○ help participants gain skills, techniques and knowledge ○ assist in supervising participants ○ assist in preparing participants to end the session ○ assist in evaluating the session
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEMR001A Respond to emergency situations • This unit must be assessed in conjunction with the following unit(s) ○ BSBCMN101A Prepare for work in business ○ activity specific competencies in fitness, community recreation, sport or outdoor recreation where required • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI001B Assist in preparing sport and recreation sessions for participants ○ SRXCAI003B Provide equipment for activities
Required knowledge and skills	• Required knowledge ○ Safe and appropriate dress and equipment for the session ○ Basic health and safety hazards associated with the session ○ Role/responsibilities with respect to the session and assisting participants ○ Basic techniques and skills appropriate to the session ○ Boundaries of role/responsibilities and the importance of notifying supervisor/senior colleague of situations beyond current competence ○ Basic warm up and cool down activities appropriate to the session ○ Points to look for when checking equipment ○ Basic standards that equipment should meet • Required skills ○ Communication skills to interact with participants and colleagues
Resource implications	• Physical resources - assessment of this competency requires access ○ to a real work environment with clients • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for

	assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assisting with analysing the evaluation • Communicating ideas and information - Encourage participants to provide feedback • Planning and organising activities - Assisting participants in the sessions • Working with teams and others - Assisting participants to warm up, help participants gain skills and knowledge, refer issues to other personnel • Using mathematical ideas and techniques - Assisting with the evaluation • Solving problems - Assisting participants in sessions • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI003B	PROVIDE EQUIPMENT FOR ACTIVITIES
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to prepare, utilise and store equipment for activities.

ELEMENT	PERFORMANCE CRITERIA
1 Issue equipment to the participant	1.1 Check the availability of equipment required by the participant 1.2 Explain clearly and accurately information with regards to any hire and deposit charges, where appropriate 1.3 Issue correct and suitable equipment and provide assistance with fitting where necessary 1.4 Collect the specified amount of money for hire charges and deposits, store monies safely and securely and record details, as required 1.5 Carry out the service politely and helpfully
2 Set up equipment	2.1 Identify equipment is correctly and remove from store 2.2 Set up equipment according to approved procedures and instructions 2.3 Leave assembled equipment in safe surroundings, so that potentially hazardous situations for staff and clients are avoided 2.4 Adopt specified lifting techniques and handle equipment in a way which avoids damage to the equipment and injury to self and other staff 2.5 Check the work environment and the equipment for damage or deterioration and report where appropriate to the responsible person
3 Take down equipment	3.1 Handle equipment in such a way as to avoid damage and danger to the handler, other staff and participants 3.2 Handle equipment so as to avoid damage to itself and the environment 3.3 Assess equipment being dismantled for damage and, where damage or deterioration has occurred promptly report to the responsible person 3.4 Carry out minor repairs as directed within the role and responsibility and to acceptable standards 3.5 Correctly follow the manufacturer's guidelines and codes of practice for dismantling equipment 3.6 Adopt the specified lifting techniques and move the equipment in such a way as to avoid injury to self and others
4 Check in equipment	4.1 Check equipment is in serviceable condition when taken back from the participant at the end of activity 4.2 Account for or report missing equipment to the responsible person 4.3 Return deposits to the participant on receipt of the equipment which has been on loan and make a suitable deduction where damage to the equipment is evident, as required 4.4 Record and report damaged or worn equipment to the responsible person, and remove, mark or store it in a way which demonstrates clearly that it is withdrawn from service, and a make a suitable report 4.5 Carry out minor repairs, as directed within the role and responsibility and to an acceptable standard 4.6 Prepare the equipment correctly for use by the next participant 4.7 Store equipment in the correct manner to ensure its future operation and serviceability

	4.8 Withdraw and dispose of equipment with expired life spans 4.9 Carry out the service politely and helpfully
5 Store equipment	5.1 Place equipment in correct storage area 5.2 Store and handle equipment so as to avoid damage to itself and the environment 5.3 Store equipment as directed 5.4 Maintain storage areas in a clean and tidy condition 5.5 Maintain accurate and up-to-date written records of stored equipment 5.6 Promptly report structural faults in the storage area to the responsible person 5.7 Follow procedures for the security of the stores 5.8 Comply with manufacturer's storage requirements correctly 5.9 Maintain necessary access and egress in the case of an emergency

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Access and egress	[all categories] • fire doors • exits
Damage or deterioration	[all categories] • damage to fabric • missing parts • failure to operate correctly
Equipment	[all categories] • simple items of equipment requiring only one person to set up • large items of equipment when the trainee is working as a member of the team and under direction • activity equipment • safety equipment
Record and report	[all categories] methods may include • written reports • verbal reports
Structural faults	[all categories] may include • cracks and warps • roof faults • damage to floor areas • leaks
Work environment	[all categories] • size of organisation • type of organisation • location • complexity

	• product/service range

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 of Variables statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of preparation, use and storage of equipment for activities in the work environment - Assessment of performance should be over a period of time covering all relevant categories within the Range Statements that are applicable in the learners work environment - In particular, assessment must confirm the ability to - issue equipment to the participant - set up equipment - take down equipment - check in equipment - store equipment
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - SRXCAI001B Assist in preparing sport and recreation sessions for participants - SRXCAI002B Assist in conducting sport and recreation sessions for participants
Required knowledge and skills	- Required knowledge - Equipment specifications and instructions for identified activities - Relevant rules, codes and guidelines for use of equipment for identified activities - Equipment testing and checking techniques for identified activities, as specified by manufacturer or organisation - Recording systems for establishing and maintaining accurate records of equipment use and maintenance - Storage requirements for identified equipment, as specified by manufacturer or organisation - Required skills - Ability to use identified equipment in order to pass this information onto participants - Communication skills (written and verbal) in advising participants on correct use of identified equipment - Interpersonal skills in order to develop rapport with participants and ensure equipment is used correctly and for intended purpose - Organisational skills in order to ensure equipment is used, maintained and stored correctly
Resource implications	- Physical resources - assessment of this competency requires access - to relevant rules, legislation, industry codes, policies and procedures as they apply to equipment in the work environment - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit

	○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	-	-	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Checking the availability of equipment, identifying equipment • Communicating ideas and information - Explaining hire and deposit charges • Planning and organising activities - Setting up the equipment, checking in equipment, checking equipment for damage, carrying out minor repairs, maintaining storage areas in clean condition • Working with teams and others - Reporting matters to the responsible person/s • Using mathematical ideas and techniques - Not applicable • Solving problems - Not applicable • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI004B	PLAN A SESSION OR PROGRAM FOR PARTICIPANTS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the basic knowledge and skills required to plan a session or program.

ELEMENT	PERFORMANCE CRITERIA
1 Collect information to plan a session or program	1.1 Identify sources of information required to plan a session or program 1.2 Ensure information is as up-to-date, accurate and comprehensive as available sources allow 1.3 Check conflicting information with relevant sources 1.4 Respect participants' and organisation's rights to confidentiality 1.5 Give consideration to the full range of participant's needs 1.6 Determine the condition of the participant in consultation with relevant support personnel and the participants aims and priorities 1.7 Conduct relevant tests and assessments 1.8 Assess the likely demands of the activity on the participants 1.9 Advise participants of any obvious reasons why they should not participate in a given session or program 1.10 Identify support personnel necessary for the session or program 1.11 Refer participants with special requirements beyond own level of responsibility to a competent person/agency 1.12 Assess the work environment with regards to the workplace context
2 Produce a session or program plan	2.1 Develop a plan which includes aims relevant to identified needs and learning 2.2 Ensure the plan includes tasks and activities to achieve the aims and is realistic to the participants and resources available 2.3 Identify and consider external factors which are likely to disrupt or influence the delivery, value and outcome of the session or program when planning the program 2.4 Assess and confirm session and participant-specific risks are within acceptable levels of supervision 2.5 Ensure the plan conforms to legislation, health and safety requirements and accepted good practice, taking into account age and stage of development of participants 2.6 Ensure the plan enables everyone to take part to the best of their ability, according to their needs and avoids discrimination or stereotyping 2.7 Seek agreement on the plan with staff, participants and organisations where relevant
3 Resource a session	3.1 Arrange a venue appropriate for the session, the participants and their abilities 3.2 Arrange equipment and resources appropriate for the activity and participants 3.3 Ensure equipment is safely modified and/or conditioned for use by different participant groups 3.4 Check resources for availability and safety 3.5 Arrange financial resources necessary for the session, where relevant 3.6 Ensure arrangements make the best use of available resources and minimise damage to the chosen environment 3.7 Ensure arrangements are sufficiently flexible to allow the activity to be modified to meet particular needs

	3.8 Confirm arrangements and resources with the appropriate staff, support personnel, organisations and participants 3.9 Provide advice to participants on physical resource requirements for the session 3.10 Organise and brief support personnel as to the extent and limitations of responsibilities, special needs of participants and expectations regarding attitudes to participants

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Equipment	[all categories] • safety requirements, eg, first aid kit and protective clothing • session/program - specific participant requirements • session/program - specific group requirements • equipment required by the session organiser
Information	[all categories] • organisational aims • expectations and aspirations of participants • numbers, ages and gender of participants • previous experience of participants • medical condition • special requirements • the session environment
Learning	[all categories] • can be through ○ demonstration and explanation ○ collaboration ○ self management ○ experimentation
Levels of supervision	[all categories] • minimal on-site supervision • restrictions on the type of site, location or facility used • restrictions on type of session conducted • restrictions on the number of participants • working within clearly defined organisational procedures and policies • restrictions on the conditions in which the session can be conducted, eg, environmental conditions, type of group
Participants	[all categories] • experienced • inexperienced • adults • children • school • variety of ethnic groups

	• participants with special needs • groups • tourists • club members • general public
Participants aims and priorities	[all categories] • competition/performance targets • self improvement • fitness targets • lifestyle adjustments • comfort/discomfort levels • technical • tactical • participation • social
Participant needs	[all categories] • physical • emotional • psychological • individual • group • individuals within group
Physical resources	[all categories] • food • water • clothing • personal equipment • safety equipment ○ sun protection ○ personal first aid requirements ○ medication
Resources	[all categories] • physical • human • financial • transport and related logistical requirements
Session or program	[all categories] • a task, game, activity or exercise in which the extent of instruction is minimal and covers only that which is required to allow the participant to participate safely and effectively • a component of a sequenced program of individual sessions • does not include drills, tasks and activities with the aim of skill

	development or enhancement in order to perform competitively or independently • of up to a day's duration, ie, no overnight component • are usually 1-2 hours duration but can be shorter or longer depending on the activity/sport and/or the aims and priorities of the participant • aimed at developing skill and tactical learning
Session or program plan	[all categories] • aim • date/s and time • physical, human and financial resources • activity stages or structure • logistics • information requirements
Sources of information	[all categories] • individuals • organisations • participants • recorded information • parents
Special requirements	[all categories] • age • medical condition • physical condition • ethnic origin • gender
Support personnel	[all categories] • coaches • administrators • teachers • health professionals • carers • assistant staff • parents/guardians • others involved/appropriate personnel
Venue	[all categories] • outdoor site/location • indoor facility
Workplace context	[all categories] • indoor or outdoor

	• within a recreation/sport activity-specific context
Work environment	[all categories] • varies with respect to • size of organisation • type of organisation • location • complexity • product/service range

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the planning of a session or program for participants using a particular facility or location • Assessment of performance should be over a period of time covering all relevant categories within the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ collect information to plan a session or program ○ produce a session or program plan ○ resource a session or program
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ BSBCMN202A Organise and complete daily work activities ○ SRXOHS001B Follow defined Occupational Health and Safety policies and procedures ○ SRXCAI001B Assist in preparing sport and recreation sessions for participants ○ SRXCAI003B Provide equipment for activities • This unit must be assessed in conjunction with the following unit(s) ○ activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI005B Conduct a sport and recreation session for participants
Required knowledge and skills	• Required knowledge ○ Sources of information on participant needs and expectations in order to effectively plan a sport and/or recreation session or program for participants ○ Legislation relevant to confidentiality to ensure this information is included in planning for a sport and/or recreation session or program for participants ○ Factors affecting group and individual needs to ensure this information is included in planning for a sport and/or recreation session or program for participants ○ Reasons for individual participation in a sport and/or recreation activity to ensure this information is included in planning for a sport and/or recreation session for participants ○ Health and other reasons affecting ability to participate in an activity ○ Organisation's policy and procedures in regard to planning a sport and/or recreation session for participants ○ Policies, procedures and requirements specific to the venue/facility ○ Risk analysis processes in order to evaluate the risk of planned sport and/or recreation activities ○ Activity specific knowledge of identified planned sport and/or recreation activities • Required skills

	○ Activity specific skills for identified planned sport and/or recreation activities ○ Organisational skills to coordinate resources necessary for planned sport and/or recreation activities ○ Ability to communicate effectively in order to plan effective sessions or programs for participants ○ Questioning skills in order to determine appropriate sport and/or recreation activities to meet participant needs ○ Ability to convey and interpret information in order to effectively and efficiently receive information and incorporate this into the planning of sessions or programs
Resource implications	• Physical resources - assessment of this competency requires access to ○ participants, equipment and a facility/venue for the conduct of a sport and/or recreation session • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the complete Range Statements and contexts applicable to planning a specific recreation session in defined locations
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	-	1	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Determining individual participants needs, assessing session or program risks, arranging resources and equipment, ensuring the plan conforms to health and safety requirements, making arrangements for the sessions and programs, arranging financial resources for the session or program, • Communicating ideas and information - Providing advice to participants, briefing support personnel, confirming arrangements with others • Planning and organising activities - Developing the session or program plan, assessing participants aims and priorities • Working with teams and others - Liaising with support personnel, developing the session or program plan • Using mathematical ideas and techniques - Not applicable • Solving problems - Planning for alternative arrangements to be in place in the event of unsuitable environmental conditions • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI005B	CONDUCT A SPORT AND RECREATION SESSION FOR PARTICIPANTS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the basic knowledge and skills to plan a non-instructional recreation session, of up to a day's duration, for participants.

ELEMENT	PERFORMANCE CRITERIA
1 Maintain participant's physical welfare	1.1 Assess participant status and condition as suitable for the session immediately prior to commencement 1.2 Monitor influencing factors which may influence the performance of the group or individual 1.3 Modify session, where necessary, based on an assessment of the conditions, participant status, facilities and equipment 1.4 Conduct activities within the session at a level and pace to suit the capabilities of individuals and/or the group
2 Maintain a positive social environment	2.1 Meet participants punctually and make them feel welcome and at ease 2.2 Inform participants of session aims and objectives and encourage them to set realistic goals 2.3 Balance group and individual needs appropriately and continuously monitor 2.4 Encourage group co-operation, participation and interaction 2.5 Establish group norms and standards and take appropriate action to address issues of equity, gender, ethnicity and emotional well-being 2.6 Balance, where relevant, levels of real and perceived risk in accordance with group and individual goals and abilities 2.7 Use negotiation and conflict resolution strategies to deal with potential problems 2.8 Use recognition and positive feedback to engender motivation and enjoyment 2.9 Make decisions over participant behaviour fairly and deal with any disagreements or conflicts with promptly and firmly
3 Establish effective communication	3.1 Establish strategies where relevant to maintain communication strategies between all group members 3.2 Communicate instructions in a manner suitable to the participants which is clear, accurate and contains all relevant information 3.3 Encourage participants to seek clarification of information when necessary 3.4 Communicate feedback to participant's at an appropriate time, on session technique and correct usage of equipment and aim to raise the participant's self-esteem and motivation
4 Ensure participant safety	4.1 Ensure personal skills are at an adequate level to engender participant confidence and to determine and maintain participant safety 4.2 Identify and note current standing practices for emergency procedures and situations outside the normal routine and deal with them in accordance with organisation's procedures 4.3 Brief participants on safe and responsible behaviour and make them aware of rules, codes, organisation's Occupational Health and Safety requirements, restrictions and the need to minimise damage to equipment and the environment 4.4 Organise participants into manageable groups with appropriate levels of supervision to situational variances and legislative requirements

	4.5 'Warm up' participants through safe and appropriate exercises relevant to the proposed session 4.6 Continuously monitor compliance with regulations and restrictions 4.7 Continuously monitor location of clients, as appropriate to the recreation session 4.8 Arrange equipment in a safe manner and appropriate to the session and continuously monitor equipment use for correct usage and compliance with safety procedures 4.9 Distribute safety equipment effectively throughout the group 4.10 Identify potential hazards, continuously assess risks during the session and confirm them as within acceptable limits in accordance with risk management policy and procedures
5 Prepare clients to end the session	5.1 Allocate sufficient time for 'cooling down' and discussions with participants 5.2 Collect and check issued equipment for damage and wear 5.3 Give participants the opportunity to provide feedback and identify further needs 5.4 Return the environment/facility to a condition acceptable for future use 5.5 Supervise participant's departure in a manner appropriate to the situation
6 Evaluate the session	6.1 Determine the parameters for evaluation 6.2 Ensure the evaluation includes the views of participants and other staff taking part 6.3 Offer feedback and receive suggestions constructively 6.4 Identify areas where personal performance could be improved and agree on ways of obtaining this improvement agreed

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Communication strategies	[all categories] • verbal • whistles • hand/arm signals • radios • phones
Emotional well-being	[all categories] • feelings • state of mind • perception of risk • self-esteem
Evaluation	[all categories] • original aims and objectives • participant satisfaction • suitability and safety of facilities and equipment • content, structure and processes of the session • personal and group objectives • personal performance
Hazards	[all categories] • environmental • people/human (behaviour) • product/equipment and their use
Influencing factors	[all categories] • weather • time of day • level of fatigue • health • injuries • environmental variables ○ heat ○ cold ○ condition of site/location

	• participant abilities
Interaction	[all categories] • group activities • games • discussions • tasks or drills
Level of supervision	[all categories] • minimal on-site supervision • restrictions on the type of site, location or facility used • restrictions on type of session conducted • restrictions on the number of participants • working within clearly defined organisational procedures and policies • restrictions on the conditions in which the session can be conducted, eg, environmental conditions, type of group
Participant	[all categories] • experienced or inexperienced • adults or children • school or youth groups • variety of ethnic groups • participants with special needs • tourists • club members • general public
Recreation session	[all categories] • a task, game, activity or exercise in which the extent of instruction is minimal and covers only that which is required to allow the participant to participate safely and effectively • may be a component of a sequenced program of individual activities • does not include drills, tasks and activity with the aim of skill development or enhancement in order to perform competitively or independently • of up to a day's duration, ie, no overnight component
Regulations and restrictions	[all categories] • imposed, recommended or enacted by ○ land/facility managers ○ organisation conducting session ○ regulatory or peak body ○ Occupational Health and Safety legislation
Situational variances	[all categories] • staff and participants abilities and experience • environmental conditions

	• age of participants • type of group • participant gender

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the conduct of a recreation session for participants using a particular facility or location • Assessment of performance should be over a period of time covering all relevant categories within the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to conduct a particular recreation session to suit ○ different participants needs ○ different session aims ○ different types of participant groups
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXFAD001A Provide first aid ○ SRXEME002A Participate in the control of minor emergencies ○ SRXCAI002B Assist in conducting sport and recreation sessions for participants • This unit must be assessed in conjunction with the following unit(s) ○ activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI003B Provide equipment for activities ○ SRXCAI004B Plan a session or program for participants
Required knowledge and skills	• Required knowledge ○ Duty of Care requirements when dealing with clients ○ Relevant Occupational Health and Safety Legislation pertaining to the conduct of activities and care of participants ○ Organisation's policy and procedures for conducting a sport and recreation session for participants ○ Activity specific Codes of Practice and guidelines for identified activities to ensure session is conducted according to these practices and guidelines ○ Site/facility requirements to ensure a sport and recreation session for participants is conducted appropriately ○ Activity aims and participants goals in order to ensure the sport and recreation session is conducted in a manner that will fulfil both ○ Group dynamics with respect to stages of group formation ○ Leadership styles in order to adjust presentation according to dynamics of the group ○ Decision making and conflict resolution strategies for dealing with group and individual situations • Required skills ○ Ability to conduct risk assessment of planned sport and recreation session to ensure safety of participants and staff ○ Problem solving strategies to resolve issues relevant to session-specific problems as well as participants interaction/conflict ○ Conflict resolution and negotiation skills to resolve conflict that arises

	○ Interpersonal skills to build rapport with participants and enhance interaction with participants ○ Communication (verbal and listening skills) in order to accurately and effectively pass on information about the sport and recreation session to participants and to hear possible problems/conflicts that participants may have during the session ○ Flexibility skills in order to modify session plans as required in order to achieve client's and organisation's aims from the activity
Resource implications	• Physical resources - assessment of this competency requires access to ○ participants, equipment and a facility/venue for the conduct of a recreation session • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the conduct of a recreation session within a particular activity area
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	2	2	2	1	1	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing participants status, ensuring participant safety, determining parameters for evaluation, • Communicating ideas and information - Informing session aims, encouraging group co-operation and participation, communicating instructions • Planning and organising activities - 'Warm up' and 'cool down' activities, supervising participants departure at the end of the session, distributing safety equipment • Working with teams and others - Seeking feedback from participants, maintaining communication with all group members • Using mathematical ideas and techniques - Using terms in sessions • Solving problems - Resolving conflict when it arises, modifying session where necessary • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI006B	ORGANISE A SPORT AND RECREATION PROGRAM
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to plan non-instructional recreation programs in a variety of contexts. Emphasis is on the depth and breadth of planning skills and knowledge to cater for a diversity of needs and situations.

ELEMENT	PERFORMANCE CRITERIA
1 Collect information to plan activities	1.1 Gather relevant information from a range of sources to plan a program of activities 1.2 Ensure information is as up to date, accurate and comprehensive as available sources allow 1.3 Seek information politely and sensitively and respect participants' and organisations' rights to confidentiality 1.4 Treat views of participants with respect and give consideration to individual participant needs as well as the group as a whole 1.5 Discuss and agree on identified needs with participants 1.6 Consider where relevant the level of interaction between participants and/or the stage of group development 1.7 Advise individual participants of any obvious reasons why they should not participate in a given activity or program of activities 1.8 Inform participants when their needs cannot be met, and give them information about other possible providers
2 Produce a plan for a program of recreation sessions	2.1 Ensure the program plan contains clear aims and objectives which can meet identified needs and makes the best use of available time and resources 2.2 Ensure the program plan provides a framework which is sufficiently flexible to allow alterations and to cope with unforeseen changes in circumstance 2.3 Encourage participants or their representatives to contribute to program design 2.4 Ensure the program plan conforms to legislation, health and safety requirements and accepted good practice 2.5 Ensure the program plan is consistent with strategies to overcome discrimination and stereotyping 2.6 Ensure the sequence of sessions within the program is designed to enhance participation and participants motivation 2.7 Ensure where relevant, the plan is agreed with staff, participants and organisations 2.8 Complete all documentation correctly
3 Coordinate and allocate program resources	3.1 Arrange a venue appropriate for the program, the participants and their abilities 3.2 Arrange equipment and resources appropriate for the program and participants 3.3 Take steps to ensure that selected staff have the necessary skills/qualifications and the ability to work sympathetically with the participants to achieve positive interaction and a supportive atmosphere 3.4 Select staff with adequate skills to engender confidence in the participants and enhance motivation throughout the program 3.5 Safely modify and/or condition equipment for use by different participant

	groups in a <i>variety of contexts</i> 3.6 Check <i>resources</i> for availability and safety 3.7 Arrange where relevant, financial <i>resources</i> necessary for the program 3.8 Ensure arrangements support the planned sequencing and coordination of sessions 3.9 Confirm arrangements and <i>resources</i> with the appropriate staff, organisations and participants 3.10 Provide clear, accurate and concise <i>information</i> and advice to participants on <i>physical resource</i> requirements for the activity 3.11 Brief, <i>assisting personnel</i> as to the extent and limitations of responsibilities, <i>special requirements</i> of participants and expectations regarding attitudes to participants

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Assisting personnel	[all categories] • teachers • carers • assistant staff • parents
Equipment	[all categories] • safety requirements, eg, first aid kit and protective clothing • session - specific client requirements • session - specific group requirements • equipment required by the session organiser
Information	[all categories] • needs and expectations of organisation • needs and expectations of participants • numbers, ages and gender of participants • previous experience and developmental stage of participants • available time • special requirements • staff, physical and financial resources • cultural and political influences
Participants	[all categories] • experienced or inexperienced • adults or children • school or youth groups • variety of ethnic groups • participants with special needs • tourists • club members • general public
Participant needs	[all categories] • physical • emotional • psychological • individual

	• group • individuals within group
Physical resources	[all categories] • food • water • clothing • personal equipment • safety equipment ○ sun protection ○ personal first aid requirements ○ medication
Program of recreation sessions	[all categories] • a sequence of tasks, games, activities or exercises in which the extent of instruction is minimal and covers only that which is required to allow the participant to participate safely and effectively • a sequenced program of individual sessions running sequentially or simultaneously, for individuals or groups • does not include drills, tasks and activities with the aim of physical skill enhancement in order to perform competitively or independently
Program plan	[all categories] • aim • date and time • physical, human and financial resources • sessions, stages or structure • logistics • information requirements
Resources	[all categories] • physical • human • financial • transport and related logistical requirements
Special requirements	[all categories] • age • medical condition • physical condition • ethnic origin • gender
Variety of contexts	[all categories] • different sites, locations or facilities used • working independently

	• different conditions in which the program sessions are conducted. That is, different ○ types of group ○ participant aims ○ session aims ○ sequences of individual sessions
Venue	[all categories] • outdoor activity site/location • indoor facility

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the planning of a recreation program for participants using a particular facility or location • Assessment of performance should be over a period of time covering all relevant categories within the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to plan a program of individual sessions to suit ○ different participant needs ○ different program aims ○ a minimum of three different types of participant groups ○ different program contexts from the range of variables statements
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXCAI003B Provide equipment for activities ○ SRXCAI004B Plan a session or program for participants ○ SRXCAI005B Conduct a sport and recreation session for participants ○ BSBCMN402A Develop work priorities ○ SRXRIK001A Undertake risk analysis of activities • This unit must be assessed in conjunction with the following unit(s) ○ activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI007B Conduct a sport and recreation program
Required knowledge and skills	• Required knowledge ○ Sources of information necessary to effectively organise an identified sport and recreation program ○ Legislation relevant to ensure compliance with confidentiality requirements of participants participating in a sport and recreation program ○ Knowledge of group dynamics and factors affecting group and individual needs in order to effectively organise a sport and recreation program ○ Reasons for client participation in a recreation program in order to ensure appropriate sport and recreation programs are organised ○ Health and other reasons affecting ability to participate in a session or a recreation program ○ Organisation's policies and procedures in regard to organising sport and recreation programs ○ Policies, procedures and requirements specific to the venue/facility in order to ensure appropriate sport and recreation programs are organised ○ Risk analysis processes in order to ensure all possible risks associated with an organised sport and recreation program have been identified and appropriate action taken to ensure safety of participants and staff ○ Activity-specific knowledge of the sport and recreation program

	organised • Required skills ○ Activity-specific skills of the sport and recreation program organised ○ Organisational skills in order to effectively plan a sport and recreation program, including all relevant details necessary to ensure smooth and efficient operation ○ Research skills to determine participant needs and organise a sport and recreation program that will suit these needs
Resource implications	• Physical resources - assessment of this competency requires access to ○ participants, equipment and a facility/venue for the conduct of recreation programs • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the organisation of programs within a recreation sector
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	2	1	2	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting a range of information, arranging resources for the program, arranging financial resources where relevant • Communicating ideas and information - Confirming arrangements and resources, seeking contribution from others to the plan • Planning and organising activities - Producing a plan, co-ordinating resources • Working with teams and others - Liaising with assisting personnel • Using mathematical ideas and techniques - Checking and modifying equipment • Solving problems - Resolving conflict when it arises • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI007B	CONDUCT A SPORT AND RECREATION PROGRAM
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to conduct non-instructional recreation programs. Emphasis is on the depth and breadth of skills and knowledge required to conduct programs in a wide variety of contexts for a diversity of needs and situations.

ELEMENT	PERFORMANCE CRITERIA
1 Coordinate resources	1.1 Ensure available resources are adequate for the planned program and satisfy health and safety requirements 1.2 Set up and arrange resources in a way which meets participants needs 1.3 Ensure access to the area is safe and possible for all participants 1.4 Ensure the coordination and allocation of resources optimises their use by participants 1.5 Brief any other staff as to their responsibilities and contributions to the program of recreation sessions
2 Conduct a program and monitor participant's condition and performance	2.1 Ensure the style of program delivery corresponds to agreed aims and is appropriate to the nature of the participants 2.2 Ensure activities/opportunities are available and meet the program aims 2.3 Monitor participants physical and emotional safety, ability and progress and regulate the level of challenge and difficulty on the basis of feedback and evaluation of the progress and emotional tolerance of the individual and group 2.4 Ensure vigilance is paid to the whereabouts of participants at all times and the form that this attention takes is consistent with the aims and objectives of the program and safety requirements 2.5 Ensure the numbers of participants remain within limits which are safe and allow all to benefit from the program 2.6 Intervene to reduce risk and ensure participant safety 2.7 Maintain the level of participant service to a high standard throughout each session within the program to ensure continuing participation in the program 2.8 Monitor motivation and/or participation levels and establish common reasons for discontinuation 2.9 Observe and analyse participants performance against criteria appropriate to the program aims 2.10 Ensure adequate and safe resources continue to be available throughout the program
3 Adjust the program to meet new needs and circumstances	3.1 Regularly monitor the program of recreation sessions and take appropriate action to keep behaviour and activities within acceptable boundaries 3.2 Attempt to obtain feedback from participants and adjust the program to meet their developing needs and capabilities 3.3 Continuously monitor venue, equipment and other resources to ensure suitability to participant and program needs 3.4 Implement contingency plans with a minimum of disruption 3.5 Keep participating staff informed of developments
4 Conclude a program	4.1 Conclude the program at a pace appropriate to the participant, their level of involvement and the duration of the program 4.2 Inform participants of any other suitable activities or programs which would

	take their development forward in a <i>variety of contexts</i>
5 Evaluate the effectiveness of a program of activities	5.1 Determine criteria upon which the <i>evaluation</i> will be conducted 5.2 Seek feedback from <i>participants</i>, staff, colleagues, organisations and other relevant stakeholders involved in individual sessions and in the program as a whole 5.3 Treat the views of all those involved positively 5.4 Evaluate all relevant components of the program, and individual sessions within the program 5.5 Analyse all information relevant to the program and record the results 5.6 Discuss the <i>evaluation</i> with the staff involved and note the ideas for the improvement of practice which have been agreed to 5.7 Use the <i>evaluation</i> to identify personal development objectives 5.8 Handle discussions and any disagreements in a way which promotes continuing and effective relationships

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Evaluation	[all categories] • aims and objectives of the program and each session • sequence of sessions • suitability and safety of facilities and equipment • content, structure and processes of the sessions within the program • constraints affecting the sessions and the overall program
Participants	[all categories] • experienced • inexperienced • adults • children • school • variety of ethnic groups • participants with special needs • youth groups • tourists • club members • general public
Participant needs	[all categories] • physical • emotional • psychological • individual • group • individuals within group
Program of recreation sessions	[all categories] • a sequence of tasks, games, activities or exercises in which the extent of instruction is minimal and covers only that which is required to allow the participant to participate safely and effectively • a sequenced program of individual sessions running sequentially or simultaneously, for individuals or groups • does not include drills, tasks and activities with the aim of physical skill enhancement in order to perform competitively or independently
Resources	[all categories]

	• physical resources • staffing • access to facilities • refreshments • finances
Variety of contexts	[all categories] • must include ○ different sites, locations or facilities used ○ working independently • different conditions in which the program sessions are conducted. That is, different ○ types of group ○ participant aims ○ session aims ○ sequences of individual sessions

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the conduct of a recreation program for participants using a particular facility or location • Assessment of performance should be over a period of time covering all relevant categories within the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to conduct a sport and recreation program including ○ co-ordinate resources ○ conduct a program and monitor participants condition and performance ○ adjust the program to meet new needs and circumstances ○ conclude a program ○ evaluate the effectiveness of a program of activities
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXCAI004B Plan a session or program for participants ○ SRXCAI005B Conduct a sport and recreation session for participants ○ SRXEMR003A Respond to emergency situations • This unit must be assessed in conjunction with the following unit(s) ○ activity - specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI003B Provide equipment for activities ○ SRXCAI006B Organise a sport and recreation program
Required knowledge and skills	• Required knowledge ○ Knowledge of group dynamics and factors affecting group and individual needs in order to effectively conduct a sport and recreation program ○ Reasons for individual participation in a recreation program in order to ensure appropriate sport and recreation programs are conducted ○ Organisation's policies and procedures in regard to conducting sport and recreation programs ○ Policies, procedures and requirements specific to the venue/facility in order to ensure appropriate sport and recreation programs are conducted ○ Risk analysis processes in order to ensure all possible risks associated with a sport and recreation program have been identified and appropriate action taken to ensure safety of participants and staff ○ Activity-specific knowledge of the sport and recreation program being conducted • Required skills ○ Activity-specific skills of the sport and recreation program being conducted ○ Communication skills

	○ Co-ordination skills ○ Evaluation skills
Resource implications	• Physical resources - assessment of this competency requires access to ○ participants, equipment and a facility/venue for the conduct of recreation programs • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the conduct of recreation programs to suit different participant groups and different participant needs
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	1	1	2	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Arranging and allocating resources, considering feedback, analysing program information • Communicating ideas and information - Keeping staff informed, seeking feedback from a range of others, advising participants of other programs • Planning and organising activities - Monitoring the program, observing performances, implementing contingency plans, • Working with teams and others - Liaising with other staff, • Using mathematical ideas and techniques - Evaluating the program, • Solving problems - Resolving conflict when it arises, adjusting program to meet participant needs, • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI008B	PLAN AND PREPARE AN INDIVIDUALISED LONG-TERM TRAINING PROGRAM
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to apply sport/activity specific knowledge to plan and prepare a long-term training program to develop participants.

ELEMENT	PERFORMANCE CRITERIA
1 Plan a long-term program	1.1 Analyse selected activity and/or position or discipline within an activity 1.2 Develop profiles for each individual, subgroup and/or group participating in the long-term program using appropriate assessment measures 1.3 Establish fixed points of the program and identify phases within the long-term program 1.4 Develop objectives for the long-term program, and each phase within the long-term program using a range of information and in consultation with the participants, and reflect the analysis of the activity and the participants profiles 1.5 Design processes to develop identified aims and integrate all components of the long-term program 1.6 Plan requirements for each session within the program 1.7 Empower the participants through the long-term program 1.8 Plan methods and scheduling of monitoring the long-term program prior to implementation
2 Apply common reasons for participation and discontinuation in activity to planning the long-term program	2.1 Identify and apply common reasons for participation in the planning of the activity 2.2 Identify and apply common reasons for discontinuation in the planning of the activity
3 Plan for competitive/performance situations within the long-term program	3.1 Develop a competition/performance strategy which matches the participants and/or teams' profiles 3.2 Identify strengths and weaknesses of the opposition in activities in which information will affect the participants' performances 3.3 Develop participant and/or team tactics and strategies to match the competition/performance strategy and the opposition profile where that is identified 3.4 Identify support needs for the competition/performance 3.5 Develop job descriptions for support personnel relevant to work environment 3.6 Match support needs with available resources 3.7 Identify potential barriers to communication with participants during competition/performance, and within relevant rules and regulations and develop strategies to overcome these barriers
4 Plan rehabilitation programs	4.1 Identify the body's physiological responses to injury and the healing processes and use in planning the activity 4.2 Identify potential psychological responses to injury and use in planning the activity 4.3 Develop a rehabilitation program plan/s

5 Assist <i>participants</i> to cope with retirement from activity	5.1 Identify <i>issues</i> which need consideration when preparing for retirement from activity 5.2 Explain <i>issues</i> to <i>participants</i> 5.3 Provide and/or coordinate counselling where adjustments to retirement cause difficulty
6 Liaise with other coaches/ instructors of <i>participants</i>	6.1 Establish on-going liaison between coaches/instructors where coaches/instructors work with the same participant 6.2 Identify role and responsibilities of the individual coaches/instructors 6.3 Identify and resolve <i>potential conflicts</i> or <i>conflict resolution</i>
7 Develop selection procedures	7.1 Develop selection policies, procedures and criteria 7.2 Critique methods of <i>testing and assessing participants</i> 7.3 Identify data required in relation to the <i>context of the selection</i> and explain the <i>strategy</i> 7.4 Develop <i>strategy</i> for determining an individual's skills in a team environment 7.5 Design <i>development program</i> for non-selected <i>participants</i> 7.6 Identify process for evaluating the management of <i>participants</i> not selected

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Analysed	[all categories] • physical • psychological • tactical • technical • leadership skills
Assessment measures	[all categories] • field assessments of fitness components • interviews with participants • observation of performance • performance history
Components	[all categories] • physical • psychological • tactical • technical and leadership skills
Conflict resolution	[all categories] • discussion • mediation • negotiation
Context of selection	[all categories] • level of participation selected participants will be involved in • duration of the participation • duration of the selection
Development program	[all categories] • support provided • options discussed • goals identified • achievement strategy identified

Empowers	[all categories] • awareness of the underlying principles and reasons for the program • opportunities for self directed learning • training diary • input into the program • participant's needs and commitments outside the activity are recognised
Fixed points	[all categories] • structure and subdivision of the competition/performance • availability of facilities • rules of the activity • rules of the competition/performance • individual and/or team involvement • intended peaks • selection dates and criteria • participant's lifestyle and availability of support personnel
Healing processes	[all categories] • first aid treatment for injuries common to the activity • recovery and rehabilitation period and activities • return to participation
Information	[all categories] • includes ○ expectations and aspirations of the participant ○ number, ages and gender of the participants ○ previous experience and developmental stage of participants, their background, special requirements, available time, expectations of organisations ○ activity national organisation codes and rules as they apply to the range of participants ○ staff and financial resources ○ cultural and political influences ○ involvement and interests of parents ○ details on time ○ necessary equipment, clothing and footwear ○ materials and provision ○ precautions and other health and safety information • is collected through ○ sport or activity specific performance tests ○ physiological procedures profiling protocols ○ discussions, and/or ○ observation • sources include ○ participants ○ parents ○ organisations ○ recorded information • is imparted ○ through demonstrations and explanations ○ through tactile input

	○ through self-exploration activity/ies, tasks or projects ○ in writing ○ verbally
Issues	[all categories] • reasons for retirement • time availability • financial resources • interpersonal relationships • anger and/or stress management • detraining • health • loss of support • transfer of skills • new skill development • career structure • self-discipline • on-going involvement in the activity at a different level
Job descriptions	[all categories] • total time • timing of position • skills • tasks and communication
Monitoring	[all categories] • fitness assessments • lab assessments • discussion with participants • training and competitive performances • training diaries
Objectives	[all categories] • participant enjoyment • competition/performance • physical • psychological • tactical • technical and leadership skills • selection • principles of training ○ specificity ○ progressive overload ○ rest and recovery ○ reversibility ○ frequency ○ intensity ○ duration ○ periodisation

	○ tapering ○ peaking ○ individuality and maintenance
Participants	[all categories] • are usually committed and self-motivated to return to optimal function and/or improve well-being • can be talented with various levels of motivation and commitment • may be beginner through to high performance level competitor • are usually over 16 years of age with some sports specific exceptions such as gymnastics or swimming where they may be younger and require parent/guardian consent prior to being included in a training program • can be ○ female or male ○ with or without disability or special needs ○ with or without social disadvantage ○ from minority ethnic and cultural groups
Phases	[all categories] • macro-cycles • micro-cycles • meso-cycles • pre-season • in-season • post-season
Potential barriers	[all categories] • background noise • time availability • stress level of coach/instructor and the participants • information overload
Potential conflicts	[all categories] • coaching/instructing styles • training program • competition/performance program • discipline procedures • techniques • tactics and time commitments
Profile	[all categories] • physical • psychological • tactical • technical • leadership skills

Psychological responses	[all categories] • denial • despair • anger and coping strategies
Reasons for discontinuation	[all categories] • coaching/instructing philosophy and/or style • time availability • boredom • competition/performance • lack of success • friends dropped out • interest in another activity • other interests outside the activity • family • culture
Reasons for participation	[all categories] • fun • skill development • fitness • competition • social interaction • self esteem • coaches and family
Requirements	[all categories] • objectives • structure • specific activities • range of activities • time • equipment and safety
Strategies	[all categories] • sign language • time outs • participants in charge of environment
Strategy	[all categories] • one or range of methods • weighting given to different sources of information • weighting given to different information

Strengths and weaknesses	[all categories] • physical • psychological • tactical • technical and leadership skills
Support needs	[all categories] • training facilities • equipment • finance • transport • coach/instructor • management and/or specialist support
Tactics	[all categories] • written competition/performance strategy • strategy communicated to participants
Testing and assessing	[all categories] • past performances • discussion with learners • physical ability tests • trial • performances in familiar environment • performances in unfamiliar environment • where relevant to the activity • positions trailed in • subjective assessments
Work environment	[all categories] • size of organisation • type of organisation • location • complexity • product/service range

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 of Variables statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of planning a long - term training program for competitive athlete/s in the work environment • Assessment of performance should be over a period of time covering all categories within the Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ develop a long-term program for competitive athlete/s that improves the performance of the athlete, while maintaining their well-being ○ take common reasons for participation and discontinuation in the activity into account when planning the long-term program ○ plan for competitive/performance situations within the long-term program ○ plan rehabilitation programs ○ assist clients to cope with retirement from activity ○ liaise with other coaches/instructors of clients ○ establish selection procedures
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXCAI004B Plan a session or program for participants • This unit must be assessed in conjunction with the following unit(s) ○ SRXCAI009B Conduct, monitor and adjust individualised long-term training programs ○ SRXCAI010B Evaluate, analyse and modify long-term and/or high performance individualised training programs ○ activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation
Required knowledge and skills	• Required knowledge ○ Relevant activity/sport specific knowledge to teach the skills being included in the training program ○ Advanced principles of skill acquisition in order to take account of all factors when planning and preparing a long term training program for an individual ○ Fundamental human anatomy and physiology necessary to consider when planning and preparing long term training programs ○ Fundamental principles of bio-mechanics necessary to consider when planning and preparing long term training programs ○ Fundamental structure and function of anatomical systems necessary to consider when planning and preparing long term training programs ○ Principles of planning and periodisation necessary to consider when planning and preparing long term training programs ○ Fundamental principles of group management necessary to consider when working with athletes in long term training programs

	○ Fundamental principles of growth and development and their relationship to coaching pedagogy ○ Sources of information that can be accessed to assist in planning and preparing long term training programs for individuals ○ Legislation relevant to ensure compliance with confidentiality requirements of participants participating in a long term training program ○ Reasons for client participation in a sport/activity in order to ensure long term training programs are meeting these needs ○ Reasons for continuation and/or discontinuation in a long-term program in order to discuss and include in planning and preparation of long-term training programs ○ Policies and procedures of the national governing body for each sport/activity ○ Organisation's policies and procedures for the conduct of individualised long - term training programs ○ Policies, procedures and requirements specific to the venue/facility ○ Knowledge of drills, activities and games to teach the fundamental sport/activity specific skills ○ Knowledge of the rules and regulations of the sport ○ Knowledge of relevant equipment and safety requirements (Note: this may include Occupational Health and Safety and legislative requirements for some sports/activities) ● Required skills ○ Ability to plan an individualised training program to improve skills ○ Ability to plan an individualised training program to improve physical performance ○ Ability to communicate effectively in order to ensure aspects of long-term plan are understood and agreed upon by the participants ○ Ability to convey and interpret information in order to ensure needs and concerns of participant are understood and included in long-term plan and this is understood by the participant ○ Adequate literacy and numeracy skills in order to be able to effectively prepare a long-term training program ○ Ability to apply the sport/activity specific rules and regulations as required in the long-term training program ○ Ability to demonstrate particular aspects of the long-term training program to participants in order to clarify points of training ○ Ability to analyse skills and break them into their component parts in order to teach others
Resource implications	● Physical resources - assessment of this competency requires access to ○ relevant sport/activity facilities, equipment and clients competing or participating at an appropriate level, ie, not the peers of the learner ● Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for</i>

	<i>Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Developing long term program, establishing fixed points of the program, developing job descriptions, identifying common reasons for continuation and discontinuation in the activity, planning rehabilitation programs, establishing selection procedures • Communicating ideas and information - Explaining retirement related issues to participants, developing long term program objectives in consultation with the participant • Planning and organising activities - Providing and /or co-ordinating counselling to participants, designing a development program for non selected participants, matching support needs for the competition to available resources • Working with teams and others - Liaising with other coaches and instructors, identifying the roles and responsibilities of individual coaches and instructors • Using mathematical ideas and techniques - Critiquing methods of assessing and testing participants • Solving problems - Identifying and resolving potential conflicts, identifying potential barriers to communication with participants • Using technology - Assisting with the testing and assessing of participants Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI009B	CONDUCT, MONITOR AND ADJUST INDIVIDUALISED LONG-TERM TRAINING PROGRAMS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to successfully utilise communication skills, sport/activity specific knowledge and combinations of teaching methods and coaching/instructional styles to conduct, monitor and adjust individualised long-term programs designed to develop a participant's skill and/or physical performance.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare the participant for involvement in a long-term training program	1.1 Identify and explain lifestyle issues associated with making a commitment to and undertaking a long-term program 1.2 Identify and explain components of a balanced lifestyle , and the relationship between those components 1.3 Establish and explain the effects of an unbalanced lifestyle through learning 1.4 Establish the participant's aims and priorities for undertaking a long-term program and ensure they are taken into consideration by them before committing to undertake a long-term program 1.5 Discuss common reasons for discontinuation in long-term programs with the participant so that they have an understanding that there are justifiable and recognised reasons for exiting a long-term program , ie, to assist in avoiding future 'self esteem' problems 1.6 Establish agreed program objectives and sport/activity specific skills 1.7 Identify the fundamental human anatomy and physiology and the fundamental principles of biomechanics
2 Implement a long-term program	2.1 Implement and monitor the long-term program 2.2 Monitor skill performance, physical performance and participant well-being throughout the long-term program 2.3 Adjust sessions and/or the long-term program according to the results of monitoring and accepted best practice principles of the sport/activity 2.4 Inform participant and, where appropriate, consult regarding adjustments to sessions and/or long-term programs in accord with accepted best practice principles of the sport/activity
3 Monitor participant during training sessions and competitions	3.1 Monitor skill performance, physical performance and participant well-being throughout the long-term program and adapt teaching methods and coaching/instructional styles as necessary 3.2 Regulate the level of challenge and difficulty on the basis of feedback and evaluation of the progress and emotional tolerance of the individual and group 3.3 Provide and/or coordinate counselling, where commitment to a long-term program causes difficulty 3.4 Ensure vigilance is paid to the whereabouts of participants at all times and the form that this attention takes and methods, resources and records used are consistent with the agreed program objectives and is in accord with accepted best practice principles of the sport/activity 3.5 Intervene to prevent hazards occurring and ensure participant safety 3.6 Follow recognised procedures calmly, correctly and with speed in accordance with accepted best practice principles of the sport/activity in

	the case of emergencies
4 Manage competitive/performance situations during the long-term program	4.1 Address relevant competitive/performance strategies, tactics and support needs 4.2 Continually monitor participants and the state of competitive/performance situation to determine factors that affect the participants' performance and participants goals 4.3 Implement intervention and communication strategies according to the results of monitoring and accepted best practice principles of the sport/activity
5 Provide feedback to participants	5.1 Provide information and feedback to participants in a manner conducive to improving performance by reinforcing progress and maintaining morale, as well as offering constructive criticism 5.2 Identify errors and areas for improvement in the performance of skills and draw them to the attention of the participant in a way which is consistent with the style of delivery 5.3 Provide feedback at a time when it is likely to have the greatest impact and cause the least disruption
6 Implement selection procedures	6.1 Develop or revise selection procedures and policies, document them and ensure they are endorsed by relevant personnel 6.2 Implement endorsed selection procedures and policies 6.3 Communicate team selections according to documented notification procedures 6.4 Implement development programs for participants not selected
7 Implement and monitor rehabilitation programs	7.1 Undertake consultation with other specialists during the development and management of rehabilitation programs 7.2 Monitor participant's progress and modify in consultation with other specialists 7.3 Assist injured participants to return to activity in accord with accepted best practice principles of the sport/activity and in consultation with other rehabilitation specialists and relevant support personnel using principles of client confidentiality

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Agreed program objectives	[all categories] refers to objectives agreed to by the participant in consultation with the coach or instructor, other specialists, siblings and relevant personnel in relation to progress including • fitness targets • lifestyle adjustments • skill performance or technique development targets, and/or • competition/performance targets
Balanced lifestyle	[all categories] • family • financial security • health • social maturity and mental state • independence/dependence • vocation • education • other interests and commitments • time management
Best practice principles of the sport/activity	[all categories] • the sport/activity's coaches or instructors code of conduct policy • the Australian Sports Commission <i>Coach's Code of Conduct</i> policy • national activity organisation regulations and guidelines • relevant national, state/territory or local government regulations and guidelines • employer organisations policies and procedures • the culture of the sport/activity • accepted preventative practices adopted by self or peers to minimise safety hazards and risks in the same or similar situations • current and past good practice demonstrated by self or peers in the same or similar situation
Coaching/instructional styles	[all categories] • refers to the presentation style/s adopted by the instructor or coach to communicate with the participant • depending on the situation the coach or instructor should be able to incorporate a range of combinations of the following styles and/or any

	associated variations ○ friendly and approachable while maintaining a 'professional distance' ○ clear, precise and, if appropriate, directive regarding not-negotiable issues, eg, safety factors ○ humorous when appropriate ○ laissez faire (or casual) when appropriate ○ organised and efficient ○ a 'critical friend' ○ motivational and encouraging ○ disciplinarian, including modification of undesirable behaviours in participants
Common reasons for discontinuation	[all categories] • conflict with the coaching/instructing philosophy and/or style • time availability • boredom • lack of success • pressure to perform • loss of social networks and/or friends • interest in other activities and/or other priorities • family • culture • time commitment • level and/or pace of participation • costs • travel • media invasion of privacy
Effects of unbalanced lifestyle	[all categories] • stress • loss of self esteem • strained relationships • financial security and/or difficulties • mental state • poor health • lack of long-term planning
Feedback	[all categories] • can be ○ verbal ○ written ○ visual ○ tactile • should be an information exchange between participant and practitioner regarding treatment, progress and their perceived well-being • addresses ○ agreed and evolving program objectives ○ information pertinent to technical adjustments

Fundamental human anatomy and physiology	[all categories] • identification and palpation of ○ bones ○ bony structures ○ joints ○ major muscles, their origins, insertion and actions • fundamental understanding of the structure and function of the following anatomical systems ○ cellular ○ bone composition and repair ○ tissue type ○ respiratory ○ cardiovascular ○ digestive ○ lymphatic ○ urinary ○ reproductive ○ endocrine ○ nervous ○ integumentary ○ homeostasis
Fundamental principles of bio-mechanics	[all categories] • levers • loads • fulcrums • moment arms
Information	[all categories] • includes ○ expectations and aspirations of participants ○ numbers, ages and gender of participants ○ previous experience and developmental stage of participants, their background, special requirements, available time, expectations or organisations ○ activity national organisation codes and rules as they apply to the range of participants staff and financial resources ○ cultural and political influences ○ involvement and interest of parents ○ details on time ○ necessary equipment, clothing and footwear ○ materials and provision ○ precautions and other health and safety information • is collected through ○ sport or activity specific performance tests ○ physiological procedures profiling protocols ○ psychological profiling procedures and protocols ○ discussions, and/or ○ observation • sources include ○ participants ○ parents ○ organisations

	○ recorded information • is imparted ○ in writing ○ verbally ○ through task/project activity
Learning	[all categories] • demonstration and explanation • collaboration • self-management • experimentation
Long-term program	[all categories] • designed to improve the performance of a participant in a recreational activity and/or sporting competitions • usually about 12 months in duration, but can be shorter or longer depending on ○ the activity ○ the competition cycles of the sport ○ the aims and priorities of the client/athlete
Monitoring	[all categories] • questioning and discussions before, during and after training sessions or competitions • observations before, during and after training sessions or competitions • cross-referencing with session and/or agreed program objectives • ongoing functional assessments of skill performance, physical performance and participant well-being as part of the formative evaluation of training program • consultation with other personnel or specialists
Other rehabilitation specialists	[all categories] • doctors • psychologists • strength and conditioning coaches • sports trainers • physiotherapists
Participants	[all categories] • are usually committed and self-motivated to improve their performance • can be talented with various levels of motivation and commitment • may be beginner through to high performance level competitors • are usually over the age of 16 years with some sport specific exceptions such as gymnastics or swimming where they may be younger and require parent/guardian consent prior to being included in a training program • can be ○ female or male ○ with or without a disability or special needs

	○ with or without social disadvantage ○ from minority ethnic and cultural groups
Participant goals	[all categories] • physiological • psychological • technical • tactical • participation • social • performance
Participant well-being	[all categories] • injury status • psychological status • emotional status • general self-esteem
Personnel	[all categories] • team officials • administrators • participants and/or participant representatives • selectors • dieticians • doctors • physiotherapists • psychologists • strength and conditioning coaches • sports trainers • other coaches
Physical performance	[all categories] • skill development or performance • results on physiological tests • results in competitive situations • results in simulated competitive situations
Principles of client confidentiality	[all categories] • information regarding participant status and/or well-being should not be passed on to other individuals without the permission of the participant • refer to best practice principles of the sport/activity
Records	[all categories] • training diaries/logbooks • attendance and injury record forms

	notes from parents and doctors' notes
Resources	[all categories] - physical - equipment - materials - health and safety provisions - indoor facilities - outdoor facilities - provisions for sessions - supporting material - grants and/or sponsorship
Sessions	[all categories] - are usually 1-2 hours in duration, but can be shorter or longer depending on the activity/sport and/or the aims and priorities of the participant - aimed at developing skill and tactical learning
Sport/activity specific skills	[all categories] - physical/motor skills - tactical/mental skills - a combination of physical and tactical, forming a sequence of skills
State of the competitive/performance situation	[all categories] - the physical and psychological state of the participant - tactical and leadership skills being displayed by the participant and/or the opposition - close or unbalanced competitive/performance situation - winning or losing
Support personnel	[all categories] - administrators - coach/es - sports scientists - sports medicine providers - agents - other health professionals - parents/guardians - other involved/appropriate personnel
Teaching methods	[all categories] - instructional or coaching approaches adopted by the instructor or coach to convey instructional content to the participant - depending on the situation the coach or instructor should be able to incorporate a range of combinations of the following approaches and/or any associated variations

	○ whole, part, whole approaches ○ shaping approaches ○ modelling approaches ○ command and response approaches ○ directive approaches through specific set tasks ○ reciprocal or peer tutoring approaches ○ feedback and refinement approaches ○ guided discovery approaches (setting problems and allowing participants to discover solutions) ○ experiential or problem solving approaches

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 of Variables statements.

Critical aspects of evidence to be considered	- Assessment must confirm the ability to utilise communication skills, apply sport/activity specific knowledge and apply combinations of teaching methods and coaching/instructional styles to conduct, monitor and adjust individualised long-term training programs designed to develop a participant's skill and/or physical performance - Assessment of performance should be over a period of time covering all categories within the Range Statements that are applicable in the learners environment - In particular, assessment must confirm the ability to - prepare the participant for involvement in a long-term training program - implement a long term program - monitor participants during training sessions and competitions - manage competitive/performance situations during the long term program - provide feedback to participants - implement selection procedures - implement and monitor rehabilitation programs
Interdependent assessment of units	- This unit must be assessed after the attainment of competency in the following unit(s) - SRXCAI004B Plan a session or program for participants - SRXCAI005B Conduct a sport and recreation session for participants - This unit must be assessed in conjunction with the following unit(s) - SRXCAI008B Plan and prepare an individualised long-term training program - SRXCA010B Evaluate, analyse and modify long-term and/or high performance individualised training programs - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation
Required knowledge and skills	- Required knowledge - Relevant activity/sport specific knowledge to teach the skills being included in the training program - Advanced principles of skill acquisition in order to take account of all factors when conducting, monitoring and adjusting long term training program for an individual - Fundamental human anatomy and physiology necessary to consider when conducting, monitoring and adjusting long term training programs - Fundamental structure and function of anatomical systems necessary to consider when conducting, monitoring and adjusting long term training programs - Fundamental principles of bio-mechanics necessary to consider when conducting, monitoring and adjusting long term training programs

	○ Fundamental principles of group management necessary to consider when working with participants in long term training programs ○ Fundamental principles of growth and development and their relationship with coaching pedagogy ○ Sources of information that can be accessed to assist in conducting, monitoring and adjusting long term training programs for participants ○ Legislation relevant to ensure compliance with confidentiality requirements of individuals participating in a long term training program ○ Reasons for individual participation in a sport/activity in order to ensure long term training programs are meeting these needs ○ Reasons for continuation and/or discontinuation in a long-term program in order to discuss and include in monitoring and adjusting of long-term training programs ○ Policies and procedures of the national governing body for each sport/activity ○ Organisation's policies and procedures for the conduct of individualised long-term training programs ○ Policies, procedures and requirements specific to the venue/facility ○ Risk analysis processes in order to ensure all possible risks associated with a sport and recreation program have been identified and appropriate action taken to ensure safety of participants and staff ○ Knowledge of drills, activities and games to teach the fundamental sport/activity specific skills ○ Knowledge of the rules and regulations of the sport and, if applicable, knowledge of the relevant modified rules of the sport ○ Knowledge of relevant equipment and safety requirements (Note: This may include Occupational Health and Safety and legislative requirements for some sports/activities) ● Required skills ○ Ability to plan an individualised training program to improve skills ○ Ability to plan an individualised training program to improve physical performance ○ Ability to communicate effectively in order to ensure aspects of long-term plan are understood and agreed upon by the participants ○ Ability to convey and interpret information in order to ensure needs and concerns of participant are understood and included when monitoring and adjusting long-term plan and this is understood by the participant ○ Adequate literacy and numeracy skills in order to be able to effectively monitor and adjust a long-term training program ○ Ability to apply the sport/activity specific rules and regulations as required in the long-term training program ○ Ability to demonstrate particular aspects of the long-term training program to participants in order to clarify points of training ○ Ability to analyse skills and break them into their component parts in order to teach others
Resource implications	● Physical resources - assessment of this competency requires access to ○ a relevant sport/activity facility/ies, equipment and participants competing or participating at an appropriate level, ie, not the peers of the learner ● Human resources - assessment of this competency will require human

	resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over several sessions (minimum 3 sessions) one of which should be early in the program and the others at least 2 months apart to ensure consistency of performance and the ongoing development of the program • In addition other evidence should be reviewed and witnessed by the assessors as part of the assessment process including ○ coaches diary and/or instructor records ○ reports from other experienced personnel who are regularly involved with the coach or instructor
Context for assessment	• This unit of competency must be assessed in the context of a real coaching/instructional situation with genuine participants. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Identifying elements of a balanced lifestyle, establishing program objectives • Communicating ideas and information - Providing feedback to participants, communicating team selections, discussing reasons for discontinuation in programs • Planning and organising activities - Monitoring participants, implementing programs, providing and/or co-ordinating counselling • Working with teams and others - Consulting with other specialists, establishing participants aims and priorities • Using mathematical ideas and techniques - Monitoring long term program • Solving problems - Intervening to prevent hazards and ensuring participant safety, adjusting sessions as a result of monitoring • Using technology - Supporting the participants involvement Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI010B	EVALUATE, ANALYSE AND MODIFY LONG-TERM AND/OR HIGH PERFORMANCE INDIVIDUALISED TRAINING PROGRAMS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to evaluate, analyse and modify the outcomes and delivery of long-term and/or high performance individualised training programs designed to improve a participant's performance.

ELEMENT	PERFORMANCE CRITERIA
1 Establish benchmarks prior to or early in the program	1.1 Collect sufficient valid and reliable data to form a basis for future comparisons in order to analyse a participants' progress 1.2 Discuss with and seek agreement from the participant on testing methodologies to be used 1.3 Use testing methodologies which conform with accepted best practice principles of the sport/activity 1.4 Organise, resource and carry out sport specific tests correctly 1.5 Record information clearly and accurately and store for future use 1.6 Handle information in accord with the principles of participant confidentiality 1.7 Discuss and establish procedural protocols regarding invasive and non-invasive testing methodologies , draping, state of undress, clarification of areas to be touched and the need to clarify any variations to these factors as they arise during the testing process
2 Undertake formative/ongoing evaluation	2.1 Use testing methodologies which have been established with and agreed to by the participant 2.2 Apply testing methodologies systematically and analyse at appropriate times throughout the coaching/instructing program 2.3 Collect, record and correctly interpret sufficient valid and reliable data and analyse in relation to agreed program objectives
3 Obtain and evaluate information from other sources regarding participant progress	3.1 Obtain information from all appropriate, competent and approved sources within the limitation of available resources 3.2 Check information for validity and reliability 3.3 Carry out any arrangements for the collection of information within the coach's responsibility correctly and efficiently 3.4 Negotiate in a manner likely to engender good working relationships 3.5 Record information clearly for future use 3.6 Handle confidential information appropriately
4 Define participants' progress towards improved and/or high performance levels	4.1 Collate and evaluate information from all relevant sources for validity and reliability 4.2 Arrange for definitions of progress to occur at specified points during the coaching/instructing program 4.3 Measure information against agreed performance objectives and priorities 4.4 Check results for long-term program which do not correspond to predicted outcomes for possible errors 4.5 Record results accurately and clearly and store for future use 4.6 Identify where appropriate, new agreed performance objectives and priorities which reflect the results of assessment and are within the participants' potential to achieve

	4.7 Handle confidential information appropriately
5 Evaluate the program	5.1 Measure and compare outcomes of the program with agreed program objectives and pre-established benchmarks 5.2 Obtain and discuss the participant's evaluation of the program 5.3 Evaluate the content, structure, balance and processes of the program 5.4 Evaluate teaching methods and coaching/instructing styles 5.5 Evaluate the contributions of support personnel and organisations involved in the activity 5.6 Evaluate the suitability and safety of facilities and equipment 5.7 Seek feedback from and discuss with participants and support personnel 5.8 Treat the views of participants and support personnel with respect 5.9 Identify program deficiencies 5.10 Discuss or share results of the evaluation process with other support personnel in accord with the principles of participant confidentiality 5.11 Maintain results of the evaluation process in accord with the principles of participant confidentiality
6 Evaluate rehabilitation programs	6.1 Evaluate rehabilitation programs in relation to their ability to assist participants recover from injury 6.2 Discuss or share results of the evaluation process with other support personnel in accord with the principles of participant confidentiality 6.3 Maintain results of the evaluation process in accord with the principles of participant confidentiality
7 Evaluate selection procedures	7.1 Evaluate notification procedures using feedback from selected and non-selected participants, and forward this information to those responsible for developing notification procedures 7.2 Evaluate the management of non-selected participants 7.3 Discuss or share results of the evaluation process with other support personnel in accord with the principles of participant confidentiality 7.4 Maintain results of the evaluation process in accord with the principles of participant confidentiality
8 Establish personal development objectives through self-evaluation	8.1 Include self-evaluation as part of the evaluation process 8.2 Review own performance against agreed program objectives and in response to participants' comments 8.3 Use self-reflection tools to assist the self-evaluation process 8.4 Examine the effectiveness of coaching/instructional style 8.5 Identify gaps regarding the range and timing the use of various teaching methods 8.6 Implement alterations to coaching/instructing style and/or teaching methods in accord with the outcomes of the self-evaluation process 8.7 Seek advice from other support personnel regarding personal development objectives 8.8 Establish personal development objectives 8.9 Establish or revise a development plan to achieve the identified personal development objectives
9 Discuss outcomes of evaluation with participants and support personnel	9.1 Share and discuss feedback regarding the evaluation of the program and recommended future modifications with the participant and support personnel 9.2 Seek feedback which recognises performance and achievement and encourages individuals to contribute future successes 9.3 Agree to changes to future programs based on the recommendations of the evaluation process with the participant

10 Make program modifications	10.1 Discuss or share results of the <i>evaluation</i> process with other <i>support personnel</i> in accord with the <i>principles of participant confidentiality</i> 10.2 Discuss recommendations regarding future program modifications with the participant and relevant <i>support personnel</i> and seek their agreement 10.3 Implement agreed program modifications

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Agreed program objectives	[all categories] - objectives agreed to by the participant in consultation with the coach or instructor, other specialists, siblings and relevant personnel in relation to - physiological targets - psychological goals - lifestyle adjustments - tactical and strategic approaches - skill performance or technique development targets - competition/performance targets
Best practice principles of the sport/activity	[all categories] - the sport/activity's coaches or instructors code of conduct policy - the Australian Sports Commission Coach's Code of Conduct policy - national activity organisation regulations and guidelines - relevant national, state/territory or local government regulations and guidelines - employer organisations policies and procedures - the culture of the sport/activity - accepted preventative practices adopted by self or peers to minimise safety hazards and risks in the same or similar situations - current and past good practice demonstrated by self or peers in the same or similar situation
Coaching/instructing styles	[all categories] - refers to the presentation style/s adopted by the instructor or coach to communicate with the participant - depending on the situation the coach or instructor should be able to incorporate a range of combinations of the following styles and/or any associated variations - friendly and approachable while maintaining a 'professional distance' - clear, precise and, if appropriate, directive regarding not - negotiable issues, eg, safety factors - humorous when appropriate - laissez faire (or casual) when appropriate - organised and efficient - a 'critical friend' - motivational and encouraging - disciplinarian, including modification of undesirable behaviours in participants

Equipment	[all categories] • fixed pieces of apparatus for use by all participants • individual equipment required by each participant in order to undertake the sport/activity, eg, tennis racquet • personal protective or non-protective clothing or attire • technical • audio-visual
Evaluation	[all categories] • questioning and discussions • observations throughout the training program • cross - referencing with session and/or agreed program objectives, and/or • ongoing functional assessments of skill performance, physical performance and participant well-being as part of the formative evaluation of training program • consultation with other support personnel or specialists
Feedback	[all categories] • can be ○ verbal ○ written ○ visual, and/or ○ tactile • should be an information exchange between participant and practitioner regarding treatment, progress and their perceived well-being • addresses ○ agreed and evolving program objectives ○ information pertinent to technical adjustments
High performance programs	[all categories] • designed to enhance the performance of participants in major national or international competitions • usually about 12 months in duration, ie, between major seasonal events or competition cycles, but can be up to four years, ie, in accord with the Olympic cycle, or longer to meet the requirements of a particular sport specific preparation cycle
Long-term programs	[all categories] • designed to improve the performance of a participant in a recreational activity and/or sporting competitions • usually about 12 months in duration, but can be shorter or longer depending on ○ the activity ○ the competition cycles of the sport ○ the aims and priorities of the participant

Participants	[all categories] • are usually committed and self-motivated to return to optimal function and/or improve well-being and improve their performance • can be talented with various levels of motivation and commitment • may be beginner through to high performance level competitors • are usually over the age of 16 years with some sport specific exceptions such as gymnastics or swimming where they may be younger and require parent/guardian consent prior to being included in a training program • can be ○ female or male ○ with or without a disability or special needs ○ with or without social disadvantage ○ from minority ethnic and cultural groups
Principles of participant confidentiality	[all categories] • information regarding participant status and/or well-being should not be passed on to other individuals without the permission of the participant
Participant goals	[all categories] • psychological • physiological • technical • tactical • participation • social • performance
Records	[all categories] • training diaries/logbooks • attendance and injury record forms • notes from parents and doctors' notes
Resources	[all categories] • physical • equipment • materials • health and safety provisions • indoor facilities • outdoor facilities • provisions for sessions • supporting material • grants and/or sponsorship
Support personnel	[all categories] • administrators

	• other coach/es • sports scientists • sports medicine providers • agents • other health professionals • parents/guardians • other involved/appropriate personnel
Teaching methods	[all categories] • instructional or coaching approaches adopted by the instructor or coach to convey instructional content to the participant • depending on the situation the coach or instructor should be able to incorporate a range of combinations of the following approaches and/or any associated variations ○ whole, part, whole approaches ○ shaping approaches ○ modelling approaches ○ command and response approaches ○ directive approaches through specific set tasks ○ reciprocal or peer tutoring approaches ○ feedback and refinement approaches ○ guided discovery approaches, ie, setting problems and allowing participants to discover solutions ○ experiential or problem solving approaches
Testing methodologies	[all categories] • sport specific performance tests • physiological procedures profiling protocols • psychological profiling procedures and protocols • discussions, and/or • observation

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 of Variables statements.

Critical aspects of evidence to be considered	- Assessment must confirm the knowledge and ability to evaluate, analyse and modify the outcomes and delivery of long-term and/or high performance individualised training programs designed to improve a participant's performance - Assessment of performance should be over a period of time covering all categories within the Range Statements that are applicable in the learners environment - In particular, assessment must confirm the ability to - establish benchmarks prior to or early in the program - undertake formative/ongoing evaluation - obtain and evaluate information from other sources regarding participant progress - define participants' progress towards improved and/or high performance levels - evaluate the program - evaluate rehabilitation programs - evaluate selection procedures - establish personal development objectives through self-evaluation - discuss outcomes of evaluation with participants and support personnel - make program modifications
Interdependent assessment of units	- This unit must be assessed after the attainment of competency in the following unit(s) - SRXCAI004B Plan a session or program for participants - SRXCAI005B Conduct a sport and recreation session for participants - This unit must be assessed in conjunction with the following unit(s) - SRXCAI008B Plan and prepare an individualised long-term training program - SRXCAI009B Conduct, monitor and adjust individualised long-term training programs - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - activity-specific competencies in the area of fitness, community recreation sport of outdoor recreation
Required knowledge and skills	- Required knowledge - Relevant activity/sport specific knowledge to teach the skills being included in the training program - Fundamental principles of skill acquisition in order to effectively evaluate, analyse and modify long term and/or high performance individualised training programs as required - Fundamental principles of bio-mechanics necessary to consider when evaluating, analysing and modifying long term training and/or high performance individualised training programs - Fundamental principles of group management necessary to consider when working with participants in long term and/or high

	performance individualised training programs ○ Fundamental principles of growth and development and their relationship with coaching pedagogy ○ Sources of information that can be accessed to assist in evaluating, analysing and modifying long term training and/or high performance individualised training programs ○ Policies and procedures of the national governing body for each sport/activity ○ Organisation's policies and procedures for the conduct of long-term training and/or high performance individualised training programs ○ Policies, procedures and requirements specific to the venue/facility ○ Risk analysis processes in order to ensure all possible risks associated with a long term and/or high performance individualised training program have been identified and appropriate action taken to ensure safety of participants and staff ○ Knowledge of drills, activities and games to teach the sport/activity specific skills ○ Knowledge of the rules and regulations of the sport and, if applicable, knowledge of the relevant modified rules of the sport ○ Knowledge of relevant equipment and safety requirements (Note: This may include Occupational Health and Safety and legislative requirements for some sports/activities) ● Required skills ○ Ability to plan a long term and/or high performance individualised training program to improve skills ○ Ability to conduct, monitor and adjust a long term and/or high performance individualised training program to improve skills ○ Ability to communicate effectively in order to ensure aspects of a long term and/or high performance individualised training program are understood and agreed upon by the participants ○ Ability to convey and interpret information in order to ensure needs and concerns of participants are understood and included when evaluating, analysing and modifying a long term and/or high performance individualised training program and this is understood by the participant ○ Adequate literacy and numeracy skills in order to be able to effectively evaluate, analyse and modify a long term and/or high performance individualised training program ○ Ability to apply the sport/activity specific rules and regulations, eg, movement, voice, use of technical aids, judgement, reporting etc ○ Ability to provide demonstrations, ie, self, other participants as models, videos, etc ○ Ability to analyse skills and break them into their component parts in order to teach others
Resource implications	● Physical resources - assessment of this competency requires ○ access to relevant sport/activity facility/ies, equipment ● Human resources - assessment of this competency will require human resources ○ the coach/instructor to be involved in a long-term or high performance individualised coaching/instructing environment ○ participant/s that are committed to their respective program/s ○ consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit

	▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment and should incorporate observation of ○ the evaluations of the long-term and/or high performance individualised training programs of at least 2 participants over a period of 3 months, or ○ the evaluation of a program for one participant over a period of at least 12 months • In addition other evidence should be reviewed and witnessed by the assessors as part of the assessment process including ○ coaches diary and/or instructor records, and ○ reports from other experienced personnel who are regularly involved with the coach or instructor
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Establishing benchmarks, establishing testing methodologies, evaluating processes and procedures, establishing or revising a developmental plan, identifying program deficiencies, examining effectiveness of coaching/instructional styles • Communicating ideas and information - Discussing testing methodologies with the participant, discussing feedback regarding the evaluation of the program • Planning and organising activities - Undertaking testing methodologies, implementing self evaluation processes • Working with teams and others - Liaising with support personnel, facilitating good working relationships with others, seeking advice from others • Using mathematical ideas and techniques - Evaluating programs and activities, measuring outcomes of programs • Solving problems - Implementing program modifications, resolving conflict when it arises • Using technology - Implementing testing methodologies Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI011B	PLAN AND PREPARE FOR PARTICIPANTS TO MEET THE DEMANDS OF HIGH LEVEL PARTICIPATION
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to apply sport/activity specific knowledge to plan and prepare a high performance individualised training program to refine the skills and performance of individuals participating at a high level.

ELEMENT	PERFORMANCE CRITERIA
1 Identify and evaluate the current demands of high level participation in the activity	1.1 Obtain information from a comprehensive range of up-to-date sources 1.2 Ensure information collected is accurate, relevant and sufficient to identify the demands of participation 1.3 Accurately classify data on the demands of participation in the activity 1.4 Realistically prioritise the demands of participation in the activity 1.5 Base conclusions on the demands of participation on reasoned argument and appropriate evidence
2 Directly assess participants' ability to meet the demands of high level participation	2.1 Use approved assessment methods appropriate to the demands of participation in the activity 2.2 Provide relevant and adequate staff, materials, equipment, resources and facilities 2.3 Provide participants with all the necessary advice and information to perform the assessments to the best of their ability 2.4 Measure and evaluate data obtained from assessment activities against current identified demands of participation 2.5 Record accurately and clearly the results of the assessment 2.6 Handle confidential sources of information in an appropriate manner
3 Assess participants' ability to meet the demands of high level participation using other experts	3.1 Ensure experts selected to carry out assessments are appropriate, competent and approved 3.2 Correctly identify current demands of participation and requirements for assessment and clearly communicate that to the other experts 3.3 Agree on the arrangements and schedule for the assessments , and carry out those that are within the learner's responsibilities efficiently and effectively 3.4 Conduct negotiations in a manner likely to engender good working relationships 3.5 Collate and accurately evaluate the results of assessment 3.6 Handle confidential information in an appropriate manner
4 Provide reports on assessments of participants' ability to meet demands of high level participation	4.1 Present reports which comprehensively summarise the results of all assessments undertaken using reliable recording methods 4.2 Ensure reports evaluate the results of all assessments and make clear any recommendations for future action 4.3 Present information which is accurate, clear and adequate to the needs of those receiving reports 4.4 Provide reports in a language and form appropriate to the intended audience 4.5 Clearly identify information to be treated confidentially
5 Identify performance	5.1 Obtain and evaluate relevant information on current demands of participation and make known to participants and colleagues

objectives to meet the demands of participation	5.2 Obtain and evaluate relevant information on current and potential levels of ability , and make known to participants and colleagues 5.3 Ensure performance objectives relate to participants' current ability and the demands of participation 5.4 Ensure performance objectives correspond to accepted good practice in the activity and the participants' age, gender and maturation 5.5 Identify performance objectives which are within participants' potential to achieve according to the participation program 5.6 Provide adequate assistance to participants and colleagues to understand and agree to performance objectives
6 Prioritise performance objectives to meet the demands of participation	6.1 Review criteria for evaluating the relative importance of performance objectives and seek agreement with participants and colleagues 6.2 Identify and agree on factors which may inhibit or promote the achievement of performance objectives 6.3 Ensure priorities relating to performance objectives reflect participants' current ability and the participation program 6.4 Summarise priorities relating to performance objectives and agree on with participants and colleagues 6.5 Record agreed priorities and store for later use 6.6 Review priorities in the light of the participants progress and developments in participation
7 Promote and encourage commitment to enable clients to achieve performance objectives	7.1 Regularly remind participants of the benefits of achieving performance objectives 7.2 Provide participants with accurate information so that they may estimate personal time and resources required to achieve agreed objectives 7.3 Provide adequate assistance to enable participants to obtain necessary support from others 7.4 Identify and make available relevant and realistic information about the experience of others pursuing similar objectives 7.5 Clients are given regular opportunities and encouragement to measure their own achievement against objectives 7.6 Clients are regularly informed of their progress and praise and encouragement offered as appropriate 7.7 Offer any criticisms in a way unlikely to undermine participants' confidence 7.8 Provide opportunities to enable individuals and groups to share their experience and confirm and reinforce commitment
8 Plan a participation program for participants	8.1 Identify and evaluate opportunities for participation appropriate to participants abilities and objectives 8.2 Combine participation opportunities in the programs in a manner which is progressively demanding for participants 8.3 Ensure programs integrate all components of performance 8.4 Consult appropriate external agencies to facilitate the program 8.5 Identify and obtain necessary resources 8.6 Identify Individual clients and determine and agree on their availability 8.7 Confirm arrangements for the program and events and communicate them in good time to all relevant personnel and organisations

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Ability	[all categories] • current • potential
Accepted good practice	[all categories] • national activity organisation regulations and guidelines
Arrangements	[all categories] • information • staff • materials • equipment • facilities
Assessment methods	[all categories] • performance in the activity under realistic participative circumstances • set tests of skill, technique, tactics and strategy • set tests of physiological and psychological readiness
Assessments	[all categories] • by participant • by others
Components of performance	[all categories] • physiological • psychological • skill • technique • tactics • strategy
Demands of participation	[all categories] • psychological • physiological

	• skill • technique • tactics • strategy
Encouragement	[all categories] • provided to ○ individuals ○ groups
Events	[all categories] • national and international opportunities for participation or performance at the level of excellence in the activity
External agencies	[all categories] • employers • parents and school/education establishments • national activity organisations • foreign and international activity organisations • facility providers • sponsors
Other experts	[all categories] • scientists • psychologists • medical personnel • other coaches/instructors
Performance objectives	[all categories] • psychological • physiological • skill • technique • tactics • strategy • long-term • short-term
Recording methods	[all categories] • computer based • written reports • profiles
Relevant personnel and organisations	[all categories]

	• participants • officials of national activity organisations • employers • parents and school/educational institutions • media • facility providers • sponsors
Reports	[all categories] • written • oral
Requirements for assessment	[all categories] • current performance ability • potential performance ability
Resources	[all categories] • finance • facilities • support personnel • equipment and clothing • transport • accommodation
Sources of information	[all categories] • observation of participation and performances at the level of excellence • evaluation of participation and performances at the level of excellence carried out by others • literature on exercise physiology and sports psychology • exercise physiology and sports psychology specialists • other coaches/instructors
Those receiving reports	[all categories] • participants • other coaches/instructors • managers • selection committees

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 of Variables statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge and ability to apply sport/activity specific knowledge to plan and prepare a high performance individualised training program to refine the skills and performance of individuals participating at a high level - Assessment of performance should be over a period of time covering all categories within the Range Statements that are applicable in the learners work environment - In particular, assessment must confirm the ability to - identify and evaluate the current demands of high level participation in the activity - directly assess participants' ability to meet the demands of high level participation - assess participants' ability to meet the demands of high level participation using other experts - provide reports on assessments of participants' ability to meet demands of high level participation - identify performance objectives to meet the demands of participation - prioritise performance objectives to meet the demands of participation - promote and encourage commitment to enable participants to achieve performance objectives - plan a participation program for individuals
Interdependent assessment of units	- This unit must be assessed after the attainment of competency in the following unit(s) - SRXCAI008B Plan and prepare an individualised long-term training program - SRXCAI009B Conduct, monitor and adjust individualised long-term training programs - This unit must be assessed in conjunction with the following unit(s) - SRXCAI010B Evaluate, analyse and modify long-term and/or high performance individualised training programs - SRXCAI012B Conduct, monitor and adjust high performance individualised training programs - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant
Required knowledge and skills	- Required knowledge - Relevant activity/sport specific knowledge to teach the skills being included in the training program - Advanced principles of skill acquisition in order to plan and prepare for participants to meet the demands of high level participation as required - Fundamental human anatomy and physiology in order to effectively plan and prepare for participants to meet the demands of high level participation as required

	○ Fundamental structure and function of anatomical systems necessary to consider when preparing for participants to meet the demands of high level participation as required ○ Fundamental principles of bio-mechanics necessary to consider when preparing for participants to meet the demands of high level participation as required ○ Fundamental principles of group management necessary to consider when preparing for participants to meet the demands of high level participation as required ○ Fundamental principles of growth and development and their relationship with coaching pedagogy ○ Sources of information that can be accessed to assist in preparing for participants to meet the demands of high level participation as required ○ Legislation relevant to ensure compliance with confidentiality requirements of participants ○ Reasons for individuals participation in a sport/activity in order to ensure training program is meeting these needs ○ Reasons for continuation and/or discontinuation in a long-term program in order to discuss and include in monitoring and adjusting of long-term training programs ○ Policies and procedures of the national governing body for each sport/activity ○ Organisation's policies and procedures for the conduct of long-term training programs ○ Policies, procedures and requirements specific to the venue/facility ○ Risk analysis processes ○ Knowledge of drills, activities and games to teach the fundamental sport specific skills ○ Knowledge of the rules and regulations of the sport and, if applicable, knowledge of the relevant modified rules of the sport ○ Knowledge of relevant equipment and safety requirements (Note: This may include Occupational Health and Safety and legislative requirements for some sports/activities) • Required skills ○ Ability to plan an individualised training program to improve skills ○ Ability to plan an individualised training program to improve physical performance ○ Ability to communicate effectively in order to ensure aspects of a training program are understood and agreed upon by the participants ○ Ability to convey and interpret information in order to ensure needs and concerns of participant are understood and included in planning and preparing for high level participation and this is understood by the participant ○ Adequate literacy and numeracy skills in order to be able to effectively plan and prepare for high level participation ○ Ability to apply the sport specific rules and regulations, eg, movement, voice, use of technical aids, judgement, reporting etc ○ Ability to provide demonstrations, ie, self, other participants as models, videos, etc ○ Ability to analyse skills and break them into their component parts in order to teach others
Resource implications	• Physical resources - assessment of this competency requires access to ○ a relevant sport facility/ies, equipment and participants competing or participating at a high level

	- Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	- Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment and should incorporate observation of - planning and preparing high performance individualised training programs of at least 3 months in duration for at least 2 participants, or - plan and prepare a program for one participant over a period of at least 12 months - In addition other evidence should be reviewed and witnessed by the assessors as part of the assessment process including - coaches diary and/or instructor records, and - reports from other experienced personnel who are regularly involved with the coach or instructor
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	3	2	2	-	2	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Gathering from a range of sources, assembling data, obtaining demands of participation, summarising priorities • Communicating ideas and information - Communicating with other experts, providing reports, providing relevant information to participants, informing participants of their progress • Planning and organising activities - Using assessment methods, providing staff, materials and equipment to assess participants ability to meet the demands of participation • Working with teams and others - Involving experts, provide assistance to participants and others • Using mathematical ideas and techniques - Not applicable • Solving problems - Resolving conflict when it arises • Using technology - Not applicable Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXCAI012B	CONDUCT, MONITOR AND ADJUST HIGH PERFORMANCE INDIVIDUALISED TRAINING PROGRAMS
CAI	Coaching and instruction

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to successfully utilise communication skills, sport specific knowledge and combinations of coaching methods and styles to conduct, monitor and adjust high performance training programs designed to enhance the skill and/or physical performance of high performance participants.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare the participant for involvement in a long-term training program	1.1 Identify and explain lifestyle issues associated with making a commitment to and undertaking a long-term program 1.2 Identify and explain components of a balanced lifestyle , and the relationship between those components 1.3 Establish and explain the effects of an unbalanced lifestyle 1.4 Establish the participant's aims and priorities for undertaking a long-term program and ensure they are taken into consideration before committing to undertake a long-term program 1.5 Discuss common reasons for discontinuation in long-term programs with the participant so that they have an understanding that there are justifiable and recognised reasons for exiting a long-term program, ie, to assist in avoiding future 'self esteem' problems 1.6 Establish agreed program objectives
2 Implement a long-term program	2.1 Implement and monitor the long-term program 2.2 Monitor skill performance, physical performance , sport specific skills and athlete well-being throughout the long-term program 2.3 Adjust sessions and/or the long-term program according to the results of monitoring and accepted best practice principles of the sport 2.4 Inform the participant and, where appropriate, consult with them regarding adjustments to sessions and/or long-term programs in accord with accepted best practice principles of the sport
3 Monitor participant during training sessions and competitions	3.1 Monitor skill performance, physical performance and athlete well-being throughout the long-term program and adapt teaching methods and coaching/instructional styles as necessary 3.2 Regulate the level of challenge and difficulty on the basis of feedback and evaluation of the progress and emotional tolerance of the individual and group 3.3 Provide and/or coordinate counselling, where commitment to a long-term program causes difficulty 3.4 Be vigilant to the athletes well-being in accord with the agreed program objectives and the accepted best practice principles of the sport 3.5 Follow recognised procedures in the case of emergencies, calmly, correctly and with speed in accord with accepted best practice principles of the sport
4 Manage competitive/performance situations during the	4.1 Address relevant competitive/performance strategies, tactics and support needs 4.2 Continually monitor high performance participants and the state of the event and conditions for the event to determine factors that affect

long-term program	the participants' performance 4.3 Implement intervention and communication strategies according to the results of monitoring and accepted best practice principles of the sport
5 Provide feedback to participants	5.1 Provide feedback to participants in a manner conducive to improving performance by reinforcing progress and maintaining morale, as well as offering constructive criticism 5.2 Identify errors, potential problems and areas for improvement in the performance of skills and draw that to the attention of participants in a way which is consistent with the style of delivery for a high performance program 5.3 Give feedback at a time when it is likely to have the greatest impact and cause the least disruption
6 Implement selection procedures	6.1 Develop or revise selection procedures, policies and the daily schedule of an event documented and endorsed by relevant support personnel 6.2 Implement endorsed selection procedures and policies 6.3 Communicate team selections according to documented notification procedures 6.4 Implement development programs for participants not selected
7 Implement and monitor rehabilitation programs	7.1 Undertake consultation with other performance assessment specialists during the development and management of rehabilitation programs 7.2 Monitor and modify participant's progress in consultation with other specialists 7.3 Assist injured participants to return to activity in accord with accepted best practice principles of the sport and in consultation with other rehabilitation specialists and relevant support personnel

Range of Variables

The Range of Variables statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range of Variables statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

VARIABLE STATEMENT	CATEGORIES
Agreed program objectives	[all categories] refers to objectives agreed to by the participant in consultation with the coach or instructor, other specialists, siblings and relevant support personnel in relation to progressive • physiological/fitness targets • psychological targets • tactical and strategic approaches • lifestyle adjustments • skill performance or technique development targets • competition/performance targets
Athletes well-being	[all categories] • injury status • psychological status • emotional status • general self-esteem
Balanced lifestyle	[all categories] • family • financial security • health • social maturity and mental state • independence/dependence • vocation • education • other interests and commitments • time management
Best practice principles of the sport	[all categories] • the sport's coaches or instructors code of conduct policy • the Australian Sports Commission coach's code of conduct policy • national activity organisation regulations and guidelines • relevant national, state/territory or local government regulations and guidelines • employer organisations policies and procedures • the culture of the sport/activity • accepted preventative practices adopted by self or peers to minimise safety hazards and risks in the same or similar situations

	current and past good practice demonstrated by self or peers in the same or similar situation
Coaching /instructional styles	[all categories] - refers to the presentation style/s adopted by the instructor or coach to communicate with the participant - depending on the situation the coach or instructor should be able to incorporate a range of combinations of the following styles and/or any associated variations - friendly and approachable while maintaining a 'professional distance' - clear, precise and, if appropriate, directive regarding not-negotiable issues, eg, safety factors - humorous when appropriate - laissez faire (or casual) when appropriate - organised and efficient - a 'critical friend' - motivational and encouraging - disciplinarian, including modification of undesirable behaviours in participants
Common reasons for discontinuation	[all categories] - conflict with the coaching/instructing philosophy and/or style - time availability - boredom - lack of success - pressure to perform - loss of social networks and/or friends - interest in other activities and/or other priorities - family - culture - time commitment - level and/or pace of participation - costs - travel - media invasion of privacy
Conditions for the event	[all categories] - indoor or outdoor environment - current or prevailing weather patterns and changes in the weather - performance requirements - identity and abilities of other participants - available resources
Daily schedule of an event	[all categories] - event timings - meal timings - team/individual briefings

	travel arrangements
Effects of unbalanced lifestyle	[all categories] - stress - loss of self esteem - strained relationships - financial security and/or difficulties - mental state - poor health - lack of long-term planning
Feedback	[all categories] - can be - verbal - written - visual, and/or - tactile - should be an information exchange between participant and practitioner regarding treatment, progress and their perceived well-being - addresses - agreed and evolving program objectives - information pertinent to technical adjustments
High performance participants	[all categories] - are usually committed and motivated to reaching their maximum potential - can be talented with relatively poor motivation and commitment - are usually competitive at least at a state level in the sport - are usually over the age of 16 years, with some sport specific exceptions such as gymnastics or swimming where they may be much younger - are usually under the age of 35 years, with some sport specific exceptions such as shooting, archery, bowls and the like - can be - female or male - with or without a disability or special needs - with or without social disadvantage - from minority ethnic and cultural groups
High performance programs	[all categories] - designed to enhance the performance of participants in major national or international competitions - usually about 12 months in duration, ie, between major seasonal events or competition cycles, but can be up to four years, ie, in accord with the Olympic cycle, or longer to meet the requirements of a particular sport specific preparation cycle
Monitoring	[all categories] questioning and discussions before, during and after training sessions or competitions

	• observations before, during and after training sessions or competitions • cross-referencing with session and/or agreed program objectives, and/or • ongoing functional assessments of skill performance, physical performance and participant well-being as part of the formative evaluation of training program • consultation with other support personnel or specialists
Participants	[all categories] • are usually committed and self-motivated to improve their performance • can be talented with various levels of motivation and commitment • may be beginner through to high performance level competitors • are usually over the age of 10 years with some sport specific exceptions such as gymnastics or swimming where they may be younger • can be ○ female or male ○ with or without a disability or special needs ○ with or without social disadvantage ○ from minority ethnic and cultural groups
Performance assessment specialists	[all categories] • bio-mechanists • physiologists • psychologists • strength and conditioning coaches • fellow coaches
Physical performance	[all categories] • skill development or performance • results on physiological tests • results in events • results in simulated events
Potential problems	[all categories] • media pressures • personal to participants • accommodation and travel/transport arrangements • food and nutritional requirements • equipment failure at a critical moment
Rehabilitation specialists	[all categories] • doctors • psychologists • strength and conditioning coaches • sports trainers • physiotherapists

Sessions	[all categories] • are usually 1-2 hours in duration, but can be shorter or longer depending on the activity/sport and/or the aims and priorities of the participant • aimed at developing skill and tactical learning
Sport specific skills	[all categories] • physical/motor skills • tactical/mental skills • a combination of physical and tactical, forming a sequence of skills
State of the event	[all categories] • the physical and psychological state of the participant • tactical and leadership skills being displayed by the participant and/or the opposition • close or unbalanced competitive situation • winning or losing
Support personnel	[all categories] • other coach/es • selectors • sports scientists • participant managers or agents • parents/guardians • team officials • administrators • participants and/or participant representatives • dieticians • doctors • physiotherapists • psychologists • strength and conditioning coaches • sports trainers • other health professionals

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 of Variables statements.

Critical aspects of evidence to be considered	- Assessment must confirm the ability to utilise communication skills, apply sport specific knowledge, apply combinations of teaching methods and combinations of coaching/instructional styles to conduct, monitor and adjust high performance training programs designed to enhance the skill and/or physical performance of high performance participants - Assessment of performance should be over a period of time covering all categories within the Range Statements that are applicable in the learners environment - In particular, assessment must confirm the ability to - prepare the participant for involvement in a high performance training program - implement a long term program - monitor participants during training sessions and competition - manage competitive/performance situations during the long term program - provide feedback to athletes - implement selection procedures - implement and monitor rehabilitation programs
Interdependent assessment of units	- This unit must be assessed after the attainment of competency in the following unit(s) - SRXCAI008B Plan and prepare an individualised long-term training program - SRXCAI009B Conduct, monitor and adjust individualised long-term training programs - This unit must be assessed in conjunction with the following unit(s) - SRXCAI010B Evaluate, analyse and modify long-term and/or high performance individualised training programs - SRXCAI011B Plan and prepare for participants to meet the demands of high level participation - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation where relevant - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - activity-specific competencies in the area of fitness, community recreation, sport or outdoor recreation
Required knowledge and skills	- Required knowledge - Relevant activity/sport specific knowledge to teach the skills being included in the training program - Advanced principles of skill acquisition in order to conduct, monitor and adjust high performance individualised training programs - Fundamental human anatomy and physiology necessary to consider when conducting, monitoring and adjusting high performance individualised training programs as required - Fundamental structure and function of anatomical systems to be considered when conducting, monitoring and adjusting high performance individualised training programs - Fundamental principles of bio-mechanics necessary to consider when conducting, monitoring and adjusting high performance individualised training programs

	○ Fundamental principles of group management necessary to consider when conducting, monitoring and adjusting high performance individualised training programs ○ Fundamental principles of growth and development and their relationship with coaching pedagogy ○ Sources of information that can be accessed to assist in conducting, monitoring and adjusting high performance individualised training programs ○ Legislation relevant to ensure compliance with confidentiality requirements of participants ○ Reasons for individual participation in a sport/activity in order to ensure training program is meeting these needs ○ Reasons for continuation and/or discontinuation in a long-term program in order to discuss and include in the monitoring and adjusting process ○ Policies and procedures of the national governing body for each sport/activity ○ Organisation's policies and procedures for the conduct of high performance individualised training programs ○ Policies, procedures and requirements specific to the venue/facility ○ Risk analysis processes in order to ensure all possible risks associated with a high performance individualised training program have been identified and appropriate action taken to ensure safety of participants and staff ○ Knowledge of the rules and regulations of the sport and, if applicable, knowledge of the relevant modified rules of the sport ○ Knowledge of relevant equipment and safety requirements (Note: This may include Occupational Health and Safety and legislative requirements for some sports/activities) ● Required skills ○ Ability to plan an individualised training program to improve skills ○ Ability to plan an individualised training program to improve physical performance ○ Ability to communicate effectively in order to ensure aspects of a training program are understood and agreed upon by the participants ○ Ability to convey and interpret information in order to ensure needs and concerns of participants are understood and included ○ Planning and preparing for high level participation and this is understood by the participant ○ Adequate literacy and numeracy skills in order to be able to effectively plan and prepare for high level participation ○ Ability to apply the sport specific rules and regulations, eg, movement, voice, use of technical aids, judgement, reporting, etc ○ Ability to provide demonstrations, ie, self, other participants as models, videos, etc ○ Ability to analyse skills and break them into their component parts in order to teach others
Resource implications	● Physical resources - assessment of this competency requires access to ○ a relevant sport facility/ies, equipment and participants competing or participating at a high level ● Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry

	through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over several sessions (minimum 3 sessions) one of which should be early in the program and the others at least 3 months apart to ensure consistency of performance and the ongoing development of the program • In addition other evidence should be reviewed and witnessed by the assessors as part of the assessment process including ○ coaches diary and/or instructor records, and ○ reports from other experienced support personnel who are regularly involved with the coach or instructor
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should include real clients and be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Identifying lifestyle issues, analysing the results of monitoring the program, considering participant well being, establishing program objectives • Communicating ideas and information - Providing feedback to participants, consulting with support personnel, advising participants of errors and areas for improvement, advising team selections • Planning and organising activities - Implementing selection procedures • Working with teams and others - Liaising with support personnel, assisting injured athletes to return to activity in consultation with rehabilitation specialists • Using mathematical ideas and techniques - Monitoring of the program, training activities associated with the program • Solving problems - Resolving conflict when it arises, adjusting the program where and when required • Using technology - Using equipment in training programs, activities and general support of the participant/s Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

COMMUNICATION

Contents

BSBCMN103A Apply basic communication skills	1
BSBCMN203A Communicate in the workplace.....	7
BSBCMN403A Establish business networks	13
BSBCMN405A Analyse and present workplace information	19
BSBFLM303A Contribute to effective workplace relationships	26
BSBMGT607A Manage knowledge and information.....	33

BSBCMN103A	APPLY BASIC COMMUNICATION SKILLS
COM	Communication

DESCRIPTION: This unit covers the development of communication skills in the workplace. It covers the activities of gathering, conveying and receiving information, together with completing assigned written information under direct supervision.

ELEMENT	PERFORMANCE CRITERIA
1 Identify workplace communication procedures	1.1 Workplace communication requirements are identified with assistance from appropriate people 1.2 Appropriate lines of communication with supervisors and colleagues are identified 1.3 Advice is sought on the communication method/equipment which is most appropriate for the task in hand 1.4 Effective questioning and active listening and speaking skills are used to gather and convey information 1.5 Instructions or inquiries are answered or followed promptly and appropriately 1.6 Appropriate non-verbal behaviour is used at all times 1.7 Constructive feedback is encouraged, acknowledged and acted upon
2 Draft written information	2.1 Relevant procedures and formats are identified 2.2 Assigned written information is drafted and presented for approval clearly and concisely within designated timelines 2.3 Written information meets required standards of style, format and detail 2.4 Assistance and/or feedback is sought to aid communication skills development

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti-discrimination and diversity • relevant industry codes of practice
Organisational procedures	may relate to • workplace procedures related to specific tasks • following instructions • answering telephone calls • requests from colleagues • use of voice mail • use of internet and email • informal discussions
Appropriate people	may include • supervisors, mentors or trainers • colleagues • other staff members
Lines of communication	may include • formal and informal means • oral or written
Communication method/equipment	may include but are not limited to • computer network systems • personal computer equipment including hardware, keyboards, software and communication packages • telephones • facsimile machines
Organisational requirements	may be included in • quality assurance and/or procedures manual • goals, objectives, plans, systems and processes • business and performance plans

	• 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
Written information	may include but is not limited to • handwritten and printed material • electronic mail • facsimiles • general correspondence or standard/form letters and memos • telephone messages or general messages
Standards	may include • standards set by work group • organisational policies
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge for the development of communication skills in the workplace • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ seek advice on most appropriate workplace communication methods and lines of communication are established ○ demonstrate that oral and written communication is clear, concise and correct and completed within designated timelines ○ prove instructions are followed promptly and appropriately and ○ show advice and feedback are actively sought, acknowledged and acted upon
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN203A Communicate in the workplace
Required knowledge and skills	• Required knowledge ○ Relevant legislation from all levels of government which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti-discrimination and diversity ○ Organisational policies, plans and procedures ○ Knowledge of a limited range of communication methods ○ Principles of effective listening, questioning and non-verbal communication ○ Writing techniques for basic workplace documents • Required skills ○ Literacy skills to identify work requirements, to draft written information and process basic, relevant workplace documentation ○ Communication skills to identify lines of communication, request advice, effectively question, follow instructions, and receive feedback and to convey messages clearly and concisely ○ Problem solving skills to solve routine problems related to the workplace under direct supervision ○ Technology skills to use business equipment under direction ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ communications equipment ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines.

	That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 • Assessment of performance requirements in this unit should be undertaken in actual workplace or simulated environment • Assessment should reinforce the integration of the key competencies and the common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - In drafting/preparing to draft written information • Communicating ideas and information - To communicate workplace information • Planning and organising activities - For own work area, under direction • Working with teams and others - To communicate information and receive feedback on performance • Using mathematical ideas and techniques - As an aid to solve problems • Solving problems - To gather and convey information under direct supervision • Using technology - To aid communication and the preparation of written information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN203A	COMMUNICATE IN THE WORKPLACE
COM	Communication

DESCRIPTION: This unit covers the skills and knowledge required to communicate in the workplace. It covers the activities of gathering, conveying and receiving information together with completing routine written correspondence.

ELEMENT	PERFORMANCE CRITERIA
1 Gather, convey and receive information and ideas	1.1 Information to achieve work responsibilities is collected from appropriate sources 1.2 The method(s)/ equipment used to communicate ideas and information is appropriate to the audience 1.3 Effective listening and speaking skills are used in oral communication 1.4 Input from internal and external sources is sought, and used to develop and refine new ideas and approaches 1.5 Instructions or enquiries are responded to promptly and in accordance with organisational requirements
2 Draft routine correspondence	2.1 Written information and ideas are presented in clear and concise language and the intended meaning of correspondence is understood by recipient 2.2 Correspondence is drafted and presented within designated timelines 2.3 Presentation of written information meets organisational standards of style, format and accuracy

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Communication equipment	may include but is not limited to • network systems • telephones • keyboard equipment including mouse, touchpad, keyboard • pens, pencils • information technology components including hardware, software and communication packages • facsimile machines
Oral communication	may include but is not limited to • handwritten and printed materials • electronic mail • internal memos • briefing notes • facsimiles • general correspondence • telephone messages
Written information	may include but is not limited to • handwritten and printed materials • electronic mail • internal memos • briefing notes • facsimiles • general correspondence • telephone messages
Organisational requirements	may be included in • quality assurance and/or procedures manual • goals, objectives, plans systems and processes

	• business and performance plans • legal and organisation policy/guidelines and requirements • access and equity principles and practice • ethical standards • Occupational Health and Safety policies, procedures and standards • defined resource parameters
Correspondence	may include but is not limited to • memorandums • messages • pro-formas • emails • standard/form letters
Standards	may include • standards set by work group • organisational policies and procedures • specified work standards • legislation • Australian Standards
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge required to communicate in the workplace - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate communication methods used are appropriate to the audience - demonstrate messages and written communication are clear, concise and correct - request for information are responded to promptly - demonstrate that information is given to clients in a clear and concise format - demonstrate correspondence produced is relevant to request
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBCMN103A Apply basic communication skills - BSBFLM303A Contribute to effective workplace relationships
Required knowledge and skills	- Required 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, especially style guide - Knowledge of and attention to standard turnaround times - Knowledge of spelling, grammar and punctuation - Principles of effective communication in relation to listening, questioning and non-verbal communication - Required skills - Literacy skills to identify work requirements and understand and process basic, relevant workplace documentation - Communication skills to request advice, receive feedback and work with a team - Planning skills to organise work priorities and arrangements - Problem solving skills to resolve routine problems - Technology skills including the ability to select and use technology appropriate to a task - Reading skills sufficient to understand basic workplace documentation - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	Physical resources - assessment of this competency requires access to

	○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 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 • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - In gathering information; in drafting correspondence • Communicating ideas and information - With members of the work team • Planning and organising activities - For self • Working with teams and others - To communicate information • Using mathematical ideas and techniques - As an aid to communicate ideas • Solving problems - To gather and convey information • Using technology - To prepare written correspondence Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM403A	ESTABLISH BUSINESS NETWORKS
COM	Communication

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Develop and maintain business networks	1.1 Appropriate network strategies are used to establish and maintain business relationships that promote organisational objectives 1.2 Network opportunities are identified and pursued to maximise a range of business contacts 1.3 Information regarding new networks is communicated to inform individuals and colleagues of potential benefits to the organisation 1.4 Professional networks and associations are participated in to obtain and maintain personal knowledge and skills
2 Establish and maintain business relationships	2.1 Business relationships are developed and maintained to promote benefits consistent with organisational requirements 2.2 Trust and confidence of business colleagues is gained and maintained through demonstration of high standards of business practices 2.3 A high level of negotiation skills are used to encourage positive outcomes 2.4 Difficult situations are identified and solutions are negotiated using collaborative problem solving techniques
3 Promote the organisation	3.1 Strategies are developed to represent and promote the organisation's interests and requirements 3.2 Appropriate presentation skills are used to communicate the goals and objectives of the organisation 3.3 Issues, policies and practices of the organisation are effectively communicated to a range of audiences in writing and orally 3.4 Feedback is obtained to identify and develop ways to improve promotional activities within available opportunities

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 • 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 membership • 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to develop and maintain effective workplace relationships and networks • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ negotiate solutions between groups and individuals ○ identify opportunities for networking ○ demonstrate presenting information in a variety of formats to a range of audiences ○ demonstrate establishing, creating and participating in networks ○ maintain records of relevant contacts ○ evaluate promotional strategies
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBFLM303A Contribute to effective workplace relationships
Required knowledge and skills	• Required knowledge ○ The relevant legislation from all levels of government 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 • Required 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify and promote networking opportunities • Communicating ideas and information - To relevant networks • Planning and organising activities - To promote the organisation • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - As an aid to measure and schedule tasks • Solving problems - To gather and convey information • Using technology - To prepare written correspondence Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM405A	ANALYSE AND PRESENT WORKPLACE INFORMATION
COM	Communication

DESCRIPTION: This unit covers the skills and knowledge required to gather, organise and present workplace information using available systems.

ELEMENT	PERFORMANCE CRITERIA
1 Gather and organise information	1.1 Information is gathered and organised in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements 1.2 Information held by the organisation is accessed and assessed for accuracy and relevance in line with established organisational requirements 1.3 Methods of collecting information are reliable and make efficient use of resources in accordance with organisational requirements 1.4 Business technology is used to access, organise and monitor information in accordance with organisational requirements 1.5 Information is updated, modified, maintained and stored in accordance with organisational requirements
2 Research and analyse information	2.1 Objectives of research are clearly defined and consistent with organisational requirements 2.2 Data used in research is valid and relevant to research purposes 2.3 Research strategies are appropriate to the requirements of the research and make efficient use of available resources 2.4 Methods of data analysis are reliable and suitable to research purposes 2.5 Assumptions used in analysis are clear, justified and consistent with research objectives 2.6 Conclusions are supported by evidence and contribute to the achievement of business objectives
3 Present information	3.1 Recommendations and issues are presented in an appropriate format, style and structure using suitable business technology 3.2 Structure and format of reports are clear and conform to organisational requirements 3.3 Research findings are reported and distributed in accordance with organisational requirements 3.4 Feedback and comments on suitability and sufficiency of findings is obtained in accordance with organisational requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Information	may include • correspondence ○ faxes ○ memos ○ letters ○ email • computer databases ○ library catalogue ○ customer records • computer files ○ letters ○ memos ○ other documents • sales records ○ monthly forecasts ○ targets achieved • forms ○ insurance forms ○ membership forms • invoices ○ from suppliers ○ to debtors • personnel records ○ personal details ○ salary rates • information on training needs • marketing reports/plans/budgets • financial figures • production targets
Organisational requirements	may include • quality assurances and/or procedures manuals • security and confidentiality requirements • legal and organisational policy/guidelines and requirements • management and accountability channels

	• Code of Conduct/Code of Ethics • procedures for updating records • Occupational Health and Safety policies, procedures and programs • information protocols • goals, objectives, plans, systems and processes • business and performance plans • anti-discrimination and related policy • ethical standards • defined resource parameters
Methods used to collect information	may include • interviews with colleagues/customers • recruitment applications and other forms • information from other organisations • previous file records • observation and listening • checking written material including referrals and client files • questioning (in person or indirect) • individual research • checking research provided by others
Business technology	may include • photocopier • computer • email • internet/extranet/intranet • answering machine • fax machine • telephone
Objectives of research	may include • hypothesis testing • situational diagnosis • identification of trends • process mapping • comparative analysis • industry pricing policies
Research strategies	may include • interviewing colleagues and clients • focus groups • data analysis • product sampling • documentation reviews
Methods of data analysis	may include • feedback on results

	• review of previous research • peer review • data sampling • statistical analysis
The organisation's 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 ○ business planning ○ marketing and customer service • organisational values and behaviours • work procedures and quality assurance manuals
Feedback on sufficiency of information	could be obtained from • customer satisfaction questionnaires • audit documentation and reports • quality assurance data • returned goods • comments from clients and colleagues
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to gather, organise and present workplace information using available systems • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ present information and data ○ maintain and handle data and documents systematically ○ demonstrate reviewing data for relevance and accuracy ○ analyse and interpret data to support organisational activities ○ demonstrate distributing information in an effective manner to gain access to a wider audience ○ clarify assumptions to assess validity of conclusions
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units ○ BSBCMN305A Organise workplace information ○ BSBCMN306A Produce business documents.
Required knowledge and skills	• Required 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 and structure ○ Knowledge of organisation's record keeping/filing systems and security procedures and safe recording practices ○ Knowledge of organisational policies and procedures relating to distribution of workplace information and legal and ethical obligations ○ Understanding methods to identify new sources of information and use them most efficiently and effectively ○ Knowledge of procedures to analyse information to identify patterns and trends ○ Understanding of qualitative and quantitative processes ○ Knowledge of information management systems and methods ○ Knowledge of principles or report writing and data presentation ○ Understanding of research processes and strategies • Required skills ○ Literacy skills to draft complex correspondence and reports, display logical information; 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 ○ Report writing skills to present information according to target

	audience; assess information for relevance and accuracy; source additional information as required ○ Problem solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate ○ Technology skills including the ability to select and use technology appropriate to a task ○ Research skills to identify and access information ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	2	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To prepare and present information • Communicating ideas and information - With members of the work team • Planning and organising activities - For preparing and presenting information • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - To analyse data • Solving problems - To present information • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBFLM303A	CONTRIBUTE TO EFFECTIVE WORKPLACE RELATIONSHIPS
COM	Communication

DESCRIPTION: This unit is equivalent to the original unit BSXFMI303A Establish and manage 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.

ELEMENT	PERFORMANCE CRITERIA
1 Gather, convey and receive information and ideas	1.1 Information to achieve work responsibilities is collected from appropriate sources 1.2 The method(s) used to communicate ideas and information is appropriate to the audience 1.3 Communication takes into account social and cultural diversity 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 2.2 The organisation's social, ethical and business standards are used to develop and maintain positive relationships 2.3 Trust and confidence of colleagues, customers and suppliers is gained and maintained through competent performance 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 3.2 Networks and other work relationships provide identifiable benefits for the team and organisation 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 4.2 Colleagues receive guidance and support to resolve their work difficulties 4.3 Poor work performance is managed within the organisation's processes 4.4 Conflict is managed constructively within the organisation's processes 4.5 Difficult situations are negotiated to achieve results acceptable to the participants, and which meet organisation's and legislative requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 Australian Qualifications Framework 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 • 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
Occupational Health and Safety considerations	may include • Occupational Health and Safety 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the

	activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to develop, establish and maintain effective workplace relationships and networks • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ establish and maintain positive work relationships ○ develop trust and confidence ○ access and analyse information to achieve planned outcomes ○ resolve problems and conflicts effectively and efficiently
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN203A Communicate in the workplace ○ BSBCMN403A Establish business networks ○ BSBFLM302A Support leadership in the workplace ○ BSBFLM304A Participate in work teams
Required knowledge and skills	• Required 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 ▪ 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 • Required 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 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competencies Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To support work responsibilities • Communicating ideas and information - With individuals and members of the work team • Planning and organising activities - In building networks • Working with teams and others - To assist improve their performance • Using mathematical ideas and techniques - To use appropriate calculations to resolve problems • Solving problems - As an aid to decision making • Using technology - To assist in the management of information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBMGT607A	MANAGE KNOWLEDGE AND INFORMATION
COM	Communication

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Obtain information relevant to business issues	1.1 Staff and customer feedback, as well as business performance data, is reviewed 1.2 Business problems and issues are identified, defined and analysed 1.3 Information required to reach a decision on problems/issues, is identified 1.4 Information is reliably sourced and efficiently gathered 1.5 Information is tested for reliability and validity, and rejected where contradictory or ambiguous 1.6 Formal and informal networks are utilised to access corporate knowledge/memory not held in formal systems, and are reviewed appropriately
2 Analyse information and knowledge	2.1 Objectives for analyses are clear, relevant and consistent with the decisions required 2.2 Patterns and emerging trends are correctly identified and interpreted as to cause and effect 2.3 Statistical analyses and interpretation are utilised where appropriate 2.4 Sensitivity analysis is undertaken on any options proposed 2.5 Documentation reflects logical approach to the evaluation of the evidence and conclusions drawn 2.6 Management information systems/decision support systems are adjusted to meet information processing objectives
3 Take decisions on business issues identified	3.1 Sufficient valid and reliable information/evidence is available to support a decision 3.2 Risk management plans are utilised to determine acceptable courses of action 3.3 Quantitative methods which are appropriate, are utilised to assist decision making where appropriate 3.4 Specialists and other relevant groups and individuals are consulted 3.5 Decisions taken are within the delegation/accountability of the group/individual responsible 3.6 Decisions reached are in accordance with organisation guidelines/procedures 3.7 Decisions taken are consistent with organisation objectives, values and standards 3.8 Decisions are taken in a timely manner
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

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base

	• high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge for the development and maintenance of information processing systems to support decision making and optimise the use of knowledge and learning throughout the organisation - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - track a particular problem/issue through the information gathering and analysis phase and arrive 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) - develop/utilise relevant information processing systems, as well as accessing informal information/knowledge from informal networks within the organisation - demonstrate Occupational Health and Safety considerations may include - provision of information about Occupational Health and Safety and the organisation's Occupational Health and Safety policies, procedures and programs - establishment and maintenance of systems for Occupational Health and Safety information records, data analysis and reporting
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required 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 - Required 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 of assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skill elaborated in the Evidence Guide, and within the scope as defined by the Range Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To identify problems/issues requiring intervention • Communicating ideas and information - To develop communication plans for decisions to be taken • Planning and organising activities - To develop and maintain informal networks • Working with teams and others - To ensure the quality and adequacy of the information available for the decision • Using mathematical ideas and techniques - To apply in quantitative decision making techniques • Solving problems - To identify and rectify problems/issues • Using technology - To collect and analyse information and disseminate decisions Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

DISABILITY

Contents

CHCDIS10A Provide care and support	1
CHCDIS11A Coordinate disability work.....	7
CHCDIS1B Orientation to disability work	15
CHCDIS2B Maintain an environment designed to empower people with disabilities	23
CHCDIS5B Contribute to positive learning.....	30
CHCDIS7A Design and adapt surroundings to group requirements	36

CHCDIS10A	PROVIDE CARE AND SUPPORT
DIS	Disability

DESCRIPTION: This unit covers the knowledge and skills required to provide support and assistance to maintain quality care for people with disabilities.

ELEMENT	PERFORMANCE CRITERIA
1 Establish and maintain an appropriate relationship with people with disabilities	1.1 All dealings with people with disabilities are aimed at generating a trusting relationship, and includes protecting confidentiality, privacy, individual choice and decision making 1.2 Respect for individual differences is demonstrated in all dealings with people with disabilities 1.3 Support for the interests, rights and decision making of people with disabilities is demonstrated in all dealings
2 Provide appropriate support to people with disabilities	2.1 All support to people with disabilities is provided in accordance with their needs, rights and self determination 2.2 Assistance is provided to people with disabilities according to organisational guidelines 2.3 Support is provided to people with disabilities in meeting their cultural needs 2.4 Assistance is sought when it is not possible to provide appropriate support to people with disabilities
3 Assist in maintaining an environment that enables maximum independent living	3.1 All support provided to people with disabilities is planned to enable them to direct their own care where appropriate, and is within organisational procedures 3.2 Assistance is provided in maintaining a safe and healthy environment, including minimising physical dangers and risks 3.3 People with disabilities are provided with support in maintaining a clean and comfortable environment 3.4 Situations of risk to health and safety are responded to in accordance with organisational procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Individual differences	may be • culture • age • economic • social • gender • physical • emotional • intellectual • language
Rights	may be detailed in • service/outcomes standards documents • legislation • organisational policies and practices
Support	will be in the context of services offered including • personal support • employment support • community access • accommodation support • lifestyle support
Assistance	may include • providing information • assistance with mobility or providing specific support such as transport • encouragement and support for decisions and actions • general household assistance and maintenance
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions

	• mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of assessment	• Assessment must confirm sufficient knowledge to provide care and support • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ provide appropriate support to the range of clients accessing the services of the organisation
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit must be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Relevant organisational policies and procedures and responsibilities within it ○ Relevant policies, protocols, and practices of the organisation in relation to own work activities ○ Basic knowledge of different types of disabilities and their effect on client needs ○ Understanding of support requirements for people with disabilities ○ Different religious, cultural, spiritual, physical and ceremonial perspectives ○ Depending on the work role or services provided, specific knowledge of particular groups or issues may be required, see additional information for assessors regarding the following ▪ alcohol and other drugs abuse ▪ cultural and linguistic diversity ▪ risk of self harm ▪ women ▪ men ▪ community education ▪ Aboriginal and Torres Strait Islander people ▪ mental health ▪ acquired brain injury • Required skills ○ Interpersonal skills appropriate to work with people with disabilities ○ Oral communication skills (language skills) necessary to develop a trusting relationship with people with disabilities. Language may be English or community language as required by service or organisation
Resource implications	• Physical resources - assessment of this competency requires access to ○ a relevant workplace or an appropriately simulated environment where assessment may take place • Human resources - assessment of this competency will require human

	resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency in performance should consider the range of clients and situations encountered in the workplace
Context of assessment	• This unit is best assessed in the workplace or a simulated workplace under the range of normal conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CHCDIS11A	COORDINATE DISABILITY WORK
DIS	Disability

DESCRIPTION: This unit covers the knowledge and skills to perform work within a legislative and ethical framework to ensure the provision of high quality service delivery which supports the rights and interests of people with disabilities.

ELEMENT	PERFORMANCE CRITERIA
1 Demonstrate commitment to high quality services for people with disabilities	1.1 All work undertaken demonstrates consideration and understanding of the context, models of service delivery, underpinning values and philosophy of the sector 1.2 All work undertaken is consistent with current relevant policies and legislative requirements for models of best practice service delivery for people with disabilities 1.3 All work reflects an understanding of the issues facing people with disabilities and their carers 1.4 All work in the sector demonstrates a commitment to access and equity principles
2 Support rights, interests and needs of people with disabilities	2.1 People with disabilities are supported and encouraged to exercise their rights and independence where appropriate 2.2 Different client requirements are incorporated in service delivery 2.3 Legal and ethical responsibilities and duty of care are complied with
3 Develop and implement a framework for quality service delivery	3.1 Strategies are devised to ensure that the delivery of high quality services continue to reflect best practice 3.2 Protocols and procedures are established and implemented for managing service delivery to reflect best practice in the disability sector 3.3 Barriers within the organisation which will impact on the delivery of high quality service delivery are identified and addressed 3.4 Procedures implemented for management of service delivery are regularly updated to reflect current best practice, relevant legislative changes, and changing client needs

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A commitment to principles of access and equity	includes • creation of a client oriented culture • a non-discriminatory approach to all people using the service, their family and friends, the general public and co-workers • ensuring the work undertaken takes account of, and caters for differences including ○ cultural ○ physical ○ religious ○ economic ○ social ○ developmental ○ behavioural ○ emotional ○ intellectual
Barriers	may include • negative personal attitudes and values of staff • organisational procedures and practices • client service strategies • social, cultural and religious • physical and economic
Context	includes • statutory framework within which work takes place • historical context of work, eg, changing attitudes; changing approaches to working with clients • changing social context of work, eg, consumer centred approach, changing government and societal views, approaches to working with clients • political context, eg, government policies and initiatives • economic context, eg, the current economic situation as it relates to and affects people with disabilities and the subsequent impact on client needs • facts/myths about disability
Different client requirements may depend upon	type of disability • physical • sensory • intellectual • psychiatric

	support availability including • family • financial • physical and emotional • employment • education and training
Different models of work in the sector	may include • community development and education • health promotion • case management • working with families • peer support/self help • residential services • respite care • home based support • community access • advocacy • employment support • lifestyle support • business services support • education and training
Interests	include • financial • accommodation • services • recreation
Issues	includes • access to services for people with disabilities and their carers • meeting individual needs and personal goals of people with disabilities • family and support structures • income and employment service • training for people with disabilities • participation and integration in the community • grieving and loss
Needs	may include • personal • security • safety
Protocols include	• communication with clients • assessment of client needs • collection, recording and reporting of information

	processes for decision making for consideration of client needs
Policy and legislative requirements include	- Disability Services Act - Disability Discrimination Act - Privacy Act - Equal Employment Opportunity principles - Guardianship Board - Individual rights - Disability Service Standards - Nurses Act - Medical Act - Medication regulations
Rights include principles expressed in	- charters of rights - outcomes standards documents - general human rights - freedom from discrimination - freedom of information
Rights may be detailed in	- legislation - resident handbooks - mission statements - industry and organisational service standards
Rights	include - privacy - confidentiality - common law - to be treated in a dignified, safe and comfortable manner - to express own feelings - freedom of association - choice to participate - access to complaint mechanisms
Strategies include those to address	- service access - individual needs - decision making and choice - privacy, dignity and confidentiality - participation and integration - valued status - complaints and disputes - service management - abuse prevention
The underpinning values and philosophies of the sector	may include - a holistic and consumer-centred approach - community education - targeting of appropriate services - commitment to meeting the needs and upholding the rights of clients

	• commitment to empowering clients
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of assessment	• Assessment must confirm sufficient knowledge to coordinate work in the disability sector • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ coordinate service or a range of services in the disability sector ○ develop or influence policy relating to quality service delivery
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Relevant legislation relating to disability issues ○ Knowledge of relevant specific culture and language used by people with disabilities ○ Knowledge specific to working with families and family systems ○ Understanding different client requirements according to different disabilities ○ Knowledge of networks in the disability sector ○ Consumer needs and rights including duty of care ○ Principles of empowerment/disempowerment in relation to people with disabilities ○ Principles of access and equity ○ Current issues facing clients and existing services for addressing needs and rights ○ Principles and practices of confidentiality ○ Knowledge specific to working with people from culturally and linguistically diverse backgrounds ○ Knowledge specific to working with people at risk of self harm ○ Organisational policies, practices and programs relating to the work role ○ Organisational occupational health and safety policies and procedures ○ Organisational philosophy and guidelines ○ Rights and responsibilities of people with disabilities ○ Understanding of stereotypes of people with disabilities ○ Available client services ○ Awareness of own attitudes to people with disabilities ○ Awareness of discriminatory actions ○ Common risks to safety ○ Depending on the work role or services provided, specific knowledge of particular groups or issues may be required, see additional information for assessors regarding the following ▪ alcohol and other drugs abuse

	▪ cultural and linguistic diversity ▪ risk of self harm ▪ women ▪ men ▪ community education ▪ Aboriginal and Torres Strait Islander people ▪ mental health • Required skills ○ Interpersonal communication with clients and other stakeholders ○ Program development, review and revision
Resource implications	• Physical resources - assessment of this competency requires access to ○ a relevant workplace or an appropriately simulated environment where assessment may take place • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency in performance should relate to requirements of the particular workplace
Context of assessment	• This unit is best assessed on the job or in a simulated workplace under the normal range of conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CHCDIS1B	ORIENTATION TO DISABILITY WORK
DIS	Disability

DESCRIPTION: This unit is intended to provide an introduction to working with people with a disability.

ELEMENT	PERFORMANCE CRITERIA
1 Demonstrate an understanding of the delivery of quality services for people with disabilities	1.1 An understanding of key issues facing people with disabilities and their carers is demonstrated 1.2 The context of policy, regulatory, legislative and legal requirements as they apply to the area of disability work is demonstrated 1.3 A commitment to access and equity principles is demonstrated 1.4 Personal values and attitudes regarding disability are taken into account when planning and implementing work with people, with disabilities 1.5 An understanding of the differences that specific disabilities may have on clients is demonstrated. This will include acquired and developmental disabilities
2 Demonstrate the capacity to support rights, interests and needs of people with disabilities	2.1 An understanding of strategies that assist in people with disabilities to exercise their rights and independence is demonstrated 2.2 Different client requirements are acknowledged 2.3 Legal responsibilities and duty of care are complied with 2.4 Situations which may pose a health or safety issues are reported according to organisational procedures 2.5 Different models for working in the sector are applied to met client needs

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A commitment to principles of access and equity	includes • creation of a client oriented culture • a non-discriminatory approach to all people using the service, their family and friends, the general public and co-workers • ensuring the work undertaken takes account of and caters for differences including ○ cultural ○ physical ○ religious ○ economic ○ social ○ developmental ○ behavioural ○ emotional ○ intellectual
Appropriate people	include • carers • supervisors • relatives • colleagues • health workers • administrators • emergency services • health care services
Context	includes • the relevant statutory framework • historical context of work, eg, changing attitudes, changing approaches to working with clients • changing social context of work, eg, consumer centred approach, changing government and societal views, approaches to working with clients • political context, eg, government policies and initiatives • economic context, eg, the current economic situation as it relates to and affects people with disabilities and the subsequent impact on client needs • facts/myths about disability
Different client requirements	may depend upon • type of disability including ○ physical

	○ sensory ○ intellectual ○ cognitive ○ psychiatric • support availability including ○ family ○ financial ○ physical and emotional ○ employment ○ education and training • presence of a terminal illness/condition
Different models of work in the sector	may include • community development and education • health promotion • case management • behaviour management • working with families • peer support/self help • residential services • respite care • home based support • community access • advocacy • employment support • lifestyle support • business services support
Interests	include • financial • accommodation • services • recreation
Issues	include • access to services for people with disabilities and their carers • meeting individual needs and personal goals of people with disabilities • family and carer issues • grief and loss
Policy and legislative requirements	include • Disability Services Act • Disability Discrimination Act • Privacy Act • Equal Employment Opportunity principles • Guardianship Board • Individual rights • Disability Service Standards • Nurses Act

	• Medical Act • Medication regulations
Responding to situations of risk in the context of the work role	may include • identifying risks • providing information on risks or potential risks • risk minimisation • strategies for preventing abuse of people with disabilities
Rights	include principles expressed in • charters of rights • outcomes standards documents • general human rights • freedom from discrimination • freedom of information include • privacy • confidentiality • common law • to be treated in a dignified, safe and comfortable manner • to express own feelings • friendship • freedom of association • choice to participate • access to complaint mechanisms
The underpinning values and philosophies of the sector	may include • a holistic and consumer-centred approach • community education • delivery of appropriate services • commitment to meeting the needs and upholding the rights of clients • commitment to empowering clients
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the

	activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the rights, responsibilities and current issues for people with a disability in the work environment • Assessment of performance should be over a period of time covering all categories of the Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ demonstrate an understanding of the rights and responsibilities of people with disabilities ○ demonstrate an understanding of the stereo types of people with disabilities ○ demonstrate an awareness of own attitudes to people with disabilities
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Knowledge of developmental and acquired disabilities ○ Understanding different client requirement according to different disabilities ○ Knowledge of networks in the disability sector ○ Holistic and client-centred care ○ Consumer needs and rights including duty of care ○ Principles of empowerment/disempowerment in relation to people with disabilities ○ Principles of access and equity ○ Principles and practices of confidentiality ○ Awareness of discriminatory actions ○ Common risks to safety ○ Role of guardianship board, trustee and independent advocate ○ Awareness and understanding of consent and strategies utilised to determine ability to consent • Required skills ○ Interpersonal communication with clients and other stakeholders
Resource implications	• Physical resources - assessment of this competency requires access to ○ a relevant workplace or an appropriately simulated environment where assessment may take place • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the

	○ relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency in performance should consider the particular workplace context
Context for assessment	• This unit is best assessed in the workplace or in a simulated workplace under the normal range of conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	3	2	3	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CHCDIS2B	MAINTAIN AN ENVIRONMENT DESIGNED TO EMPOWER PEOPLE WITH DISABILITIES
DIS	Disability

DESCRIPTION: This unit covers the knowledge and skills required by the worker to facilitate the empowerment of a people with a disability.

ELEMENT	PERFORMANCE CRITERIA
1 Work to enhance the independence and 'self-determination' of the person with a disabilities	1.1 Independent action and thinking by the person with the disability is encouraged and supported 1.2 Options for action on relevant issues are identified and discussed with the person with the disability and/or their advocate/s/carers 1.3 Where required, ongoing support is provided to maximise independence 1.4 Assistance is provided as appropriate to communicate needs, interests and requirements of person with a disability, their carers and significant others
2 Foster the independence of a person with a disability	2.1 Strategies are developed and supported to promote independence, taking differences into account 2.2 On-going supported is provided, where required, to maximise the independence of the person with the disability 2.3 Colleagues are encouraged to promote the independence of people with a disability 2.4 people with a disability are encouraged to participate in appropriate forums and provided with information and skills to do so
3 Contribute to the development and review of policy and legislation related to disabilities and disability services	3.1 People with disability and/or their advocate/s/carers are encouraged to express their views about policies, legislation and empowerment 3.2 Non-compliance with legislation and/or policy and protocols are reported to an appropriate person 3.3 Contribution is made to the review of legislation and policy frameworks 3.4 Feedback is provided from consumers through appropriate mechanisms 3.5 Work as a member of a team to research and contribute to policies on empowerment
4 Recognise and accommodate the expressions of identity and sexuality of the person with a disability	4.1 An understanding of the impact of a disability on an individual's expression of identity and sexuality is demonstrated 4.2 The impact of community values and attitudes regarding sexuality and a person with the disability are recognised 4.3 The worker's own values and attitudes regarding sexuality are not imposed on others 4.4 The person with the disability is supported to express their identity and sexuality 4.5 Different spiritual and cultural expressions of sexuality are respected 4.6 Unmet needs relating to identity and sexuality are acknowledged and referred to an appropriate person

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Contexts	may include • an individual's own dwelling • shared household or group dwellings • specialist residential facilities • community centres • supported employment venues • community/government agencies
People with a disability	may include • individuals at any stage of the life span • individuals living in the community, either alone or with family or carers • individuals living in supported community accommodation • individuals living in funded residential facilities • prospective individuals to the service or services
Policy and legislation	may include those related to • disabilities services • disabilities services standards • privacy • equal employment opportunity • disability discrimination • guardianship • occupational health and safety • freedom of Information • Public health • Building codes and standards • criminal Acts • access and equity
Reporting	may be and include • verbal ○ telephone ○ face to face • non-verbal (written) ○ progress reports ○ case notes ○ incident reports
Strategies for supporting people	may include

with a disability to express their ideas and opinions	• role modelling • training • provision of information to support views • connecting individual's with lobbyist and people with appropriate expertise • assistance with preparation of reports/submissions and speech writing
Sexuality and identity needs	may include • love and affection • relationships and intimacy • touch • physical appearance • need for privacy and discretion • access to assistive/protective devices • safety • sexual health • contraception • pregnancy, child birth and parenting
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the skills and processes required to empower people with disabilities in the work environment • Assessment of performance should be over a period of time covering all categories of the Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ understand and adherence to own work role and responsibilities ○ follow organisational policies, protocols and procedures ○ liaise and report appropriately to supervisor ○ understand and demonstrate application of legislation and policy related to providing services in the disability sector ○ promote the self-determination and empowerment of people with a disability ○ demonstrate an understanding of impact of personal values and attitudes on providing an effective service
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Relevant policies, protocols and practices of the organisation in relation to Unit Descriptor and work role ○ Understanding of the legislative processes related to the rights of people with a disability ○ Strategies for supporting independent action and thinking ○ Basic principles of lobbying ○ Strategies for reinforcing people with a disability's right to contribute and to be heard ○ Concepts of self-advocacy ○ Social justice principles ○ Roles and responsibilities in relation to contributing to the review of legislation and policy frameworks ○ Principles and practices of public speaking ○ Mechanisms for providing feedback to consumers ○ Myths and stereotypes surrounding sexuality and people with a disability ○ Distinction between appropriate and inappropriate sexual behaviour ○ Barriers to, and support for, diversity in sexual expression ○ Different cultural and spiritual expressions of identity and sexuality ○ Issues surrounding sexuality and sexual expression in residential facilities and communal living environments ○ Strategies for managing inappropriate sexual behaviour • Required skills ○ Reading and writing skills-literacy competence required to fulfil

	work role in a safe manner and as specified by the organisation/service. This requires a level of skill that enables the worker to follow and give work related instructions and directions and the ability to seek clarification and comments from clients, colleagues, health professionals and other service providers. Industry work roles will require workers to possess a literacy level that will enable them to, read and write client's service delivery plans, record in health records, and write reports and submissions ○ Oral communication skills-language competence required to fulfil work role in a safe manner and as specified by the organisation. This requires a level of skill that enables the worker to follow work related instructions and directions and the ability to seek clarification and comments from supervisors, clients and colleagues. Industry work roles will require worker to possess oral communication skills that will enable them to ask questions, clarify understanding, recognise and interpret non-verbal cues, provide information and express encouragement and support and speak in a small and large public forum ○ Problem solving skills that require negotiation and mediation skills to resolve problems of an intermediate nature within organisational protocols ○ Ability to work effectively with clients, colleagues and supervisors ○ Implement education programs for individuals and small groups in relation to sexuality ○ Examine impact of personal values and attitudes on deliver ○ Ability to support diversity in relationships and sexual expression
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate workplace where assessment may take place ○ relevant organisational policy, protocols and procedures ○ access to equipment and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• It is recommended that assessment or information for assessment will be conducted or gathered over a period of time and cover the normal range of workplace situations and settings
Context for assessment	• This unit will be most appropriately assessed in the workplace or in a simulation workplace and under the normal range of conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on underpinning knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or

	other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	3	2	3	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CHCDIS5B	CONTRIBUTE TO POSITIVE LEARNING
DIS	Disability

DESCRIPTION: This unit describes the knowledge and skills required by the worker to support a person with a disability to develop new skills to maximise independence.

ELEMENT	PERFORMANCE CRITERIA
1 Assess the learning ability and needs of a person with a disability	1.1 The educational needs of the person with the disability is recognised in order for appropriate learning objectives to be achieved 1.2 Participate in the assessment of an individual's skills and knowledge in relation to specific learning goals 1.3 Engage the individual in identifying their learning goals
2 Implement skill development plan	2.1 A range of learning opportunities are identified and described within organisational policy and protocols 2.2 Learning strategies are implemented and documented in conjunction with relevant personnel 2.3 Equipment and resources are accessed and utilised to facilitate the learning process 2.4 Learning objectives are monitored and documented against skills development or maintenance plan 2.5 Feedback is provided to the person with the disability and/or their advocate/s regarding progress towards learning objectives
3 Utilise incidental learning opportunities to enhance skills development	3.1 Situations that can be used as possible informal learning opportunities are identified, and learning encouraged 3.2 The appropriate level of support is withdrawn when directed in order to encourage experimental learning 3.3 Appropriate constructive advice and feedback is provided to the person with the disability as soon as possible and in an appropriate format 3.4 Encouragement is given when the person with the disability takes the initiative in the learning situation 3.5 A range of informal learning opportunities are identified and described in the context of organisational policies and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Contexts	may include • an individual's own dwelling • shared households or group dwellings • specialist residential facilities • community centres • supported employment venues • open employment venues • community/government agencies • open employment venues • voluntary agencies • training agencies
Learning strategies	may include • role modelling • demonstration • skills component mastery • behaviour modification • contextualisation • drama and role plays • peer education
People with a disability	may include • individual's at any stage of the life span • individuals living in the community, either alone or with family or carers • individuals living in supported community accommodation • individuals living in funded residential facilities
Relevant personnel	may include • development officers • employment officers • carers • occupational therapists • teachers • educational psychologists • technicians • advocate/s • programming staff • behavioural consultants (for acquired brain injury)

Skill development	may be in • life skills • vocational skills • social skills • personal support skills • developing and maintaining relationships including intimate relationships • maintaining physical health including sexual health • safety
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the skills and processes required to empower people with disabilities in the work environment • Assessment of performance should be over a period of time covering all categories of the Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ demonstrate an understanding and adherence to own work role and responsibilities ○ follow organisational policies and protocols ○ liaise and report to relevant personnel ○ demonstrate an understanding and applying knowledge of learning and development in order to assess, determine, implement, monitor and evaluate the skills development of a person with a disability
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Knowledge of social, sexual, emotional, psychological and cognitive development ○ Overview of adult and childhood learning theories ○ Tools, equipment and other resources utilised in the learning process ○ Various teaching and learning strategies ○ Strategies for identifying and maximising informal learning opportunities ○ Services and resources available to people with special learning needs • Required skills ○ Reading and writing skills-literacy competence required to fulfil work role in a safe manner and as specified by the organisation/service. This requires a level of skill that enables the worker to follow and give work related instructions and directions and the ability to seek clarifications and comments from clients, colleagues, health professionals and other service providers. Industry work roles will require workers to possess a literary level that will enable them to, read and write client's service delivery plans, record in health records, complete assessment tools and write reports and submissions ○ Oral communication skills-language competence required to fulfil work role in a safe manner and as specified by the organisation. This requires a level of skill that enables the worker to follow work related instructions and directions and the ability to seek clarification and comments from supervisors, clients and

	colleagues. Industry work roles will require workers to possess effective verbal and non-verbal communication skills that will enable them to ask questions, clarify understanding and meaning, recognise and interpret non-verbal cues, adapt communication styles to meet specific needs, provide information and express encouragement and support ○ Numeracy skills required to fulfil work role in a safe manner and as specified by the organisation. Industry work roles will require workers to be able to perform mathematical functions, such as addition and subtraction up to three digit numbers and multiplication and division of single and double digit numbers ○ Problem solving skills that require negotiation and mediation skills to resolve problems of a difficult nature within organisational protocols ○ Ability to collaborate and network with a variety of personnel in order to achieve learning and development objectives
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate workplace where assessment can take place ○ simulation of realistic workplace setting for assessment ○ relevant organisational policy, protocols and procedures • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• It is recommended that assessment or information for assessment will be conducted or gathered over a period of time and cover the normal range of workplace situation and settings
Context for assessment	• This unit will be most appropriately assessed in the workplace or in a simulated workplace under the normal range of conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	3	2	3	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CHCDIS7A	DESIGN AND ADAPT SURROUNDINGS TO GROUP REQUIREMENTS
DIS	Disability

DESCRIPTION: This unit describes the competencies used by staff to design and implement measures to maximise convenience of use of various physical settings in the community at large for people with disabilities as a group through assessing and adapting locations and designing new locations.

ELEMENT	PERFORMANCE CRITERIA
1 Assess locations	1.1 Assess group's requirements in the context of the existing location with the active participation of the people with disabilities and other staff involved 1.2 Physical entry and exit is assessed and any problems discussed with the active participation of the people with disabilities involved 1.3 Requirements for aids, environmental modification and support and strategies to deal with these are developed with the active participation of the people with disabilities involved 1.4 Individual and cultural differences relating to the assessment of locations are recognised, explained and strategies to deal with these developed
2 Design and/or use appropriate aids	2.1 Options for adaptations and design of aids are discussed and choices justified 2.2 Appropriate aids are designed according to group requirements 2.3 Adaptations to location and environment are carried out in response to identified group requirements 2.4 A process for evaluation and review of the adaptations is put in place including dates set and people identified to contribute
3 Design new location to group requirements	3.1 People with disabilities, significant others and other support staff are actively involved in the process of identifying building requirements 3.2 Physical entry and exit is planned and noted with groups' requirements in mind 3.3 Requirements for aids, environmental design and support, and strategies to deal with these are identified and recorded 3.4 Own limitations are recognised and expert assistance is sought where necessary 3.5 Reports and recommendations are made on building requirements to managers or boards of management 3.6 Individual and cultural differences impacting on the design of locations are recognised and described and strategies to deal with these are developed

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Locations concerned	may be - workplaces - community centres - residences - educational and recreational facilities - various service facilities
Examples of physical exit and entry issues	involve - curbs - lifts - lighting - signs
Environmental support	may involve - volunteers - co-workers - training officers being trained to support the person with a disability
Examples of assessment processes	include - job or activity analysis - task analysis
Expert assistance	may come from - architects - builders - other specialists
Examples of boards of management	include - appointed management committees - elected management committees - Chief executive officers
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations

	• large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of the requirements for people with a disability and the skills to provide and manage these services in the work environment - Assessment of performance should be over a period of time covering all categories of the Range Statements that are applicable in the learners environment - In particular, assessment must confirm the ability to - demonstrate identification of specific requirements of people with disabilities - organise consultation requirements relating to proposed adaptations
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - Organisational policies and procedures relating to the design and adoption of group surroundings - Impact of disabilities on people with disabilities - Occupational health and safety guidelines - Ergonomics - Range of available aids - Depending on the work role or services provided, specific knowledge of particular groups or issues may be required, see additional information for assessors regarding the following - alcohol and other drugs abuse - cultural and linguistic diversity - risk of self harm - women - men - community education - Aboriginal and Torres Strait Islander people - mental health - Required skills - Designing skills - Assessment - Communication with individuals and groups
Resource implications	- Physical resources - assessment of this competency requires access to - a relevant workplace or an appropriately simulated environment where assessment may take place - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit

	○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency in performance should consider the particular requirements of services and workplaces
Context for assessment	• This unit is best assessed in the workplace or in a simulated workplace under the normal range of conditions • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	3	3	3	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

EMERGENCY RESPONSE

Contents

SRXEMR001A Respond to emergency situations	1
SRXEMR002A Coordinate emergency response	10
SRXEMR003A Administer oxygen in an emergency situation	16

SRXEMR001A	RESPOND TO EMERGENCY SITUATIONS
EMR	Emergency response

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to recognise potential risks and emergency situations and to take action, within own area of responsibility and ability.

ELEMENT	PERFORMANCE CRITERIA
1 Evaluate the emergency	1.1 Identify and action emergency reports and signals correctly and recognise and assess emergency and potential emergency situations 1.2 Seek advice from relevant people , if appropriate, when evaluating the emergency 1.3 Identify situations where initial response actions are not safe or are likely to be ineffective and outline methods for reporting according to procedures 1.4 Assess the possible development of the emergency situation and evaluate further potential hazards to clients and staff 1.5 Assess injuries and treat appropriately 1.6 Examine the situation variables 1.7 Prioritise needs, including those for assistance, promptly and accurately
2 Develop a plan of action	2.1 Identify and evaluate options for action 2.2 Utilise available resources efficiently 2.3 Develop a plan which balances group and individual safety with contextual issues 2.4 Outline the involvement of other individuals in the plan 2.5 Implement organisational emergency procedures and policies correctly as part of the plan of action 2.6 Apply occupational health and safety requirements and safe working practices in the plan of action, including selection of personal protective clothing and equipment to suit the emergency situation
3 Control the emergency	3.1 Implement the plan of action using techniques appropriate to the situation and available resources and abilities 3.2 Operate equipment safely and, where necessary, improvise equipment and techniques 3.3 Identify and implement strategies for group control and remove clients and other individuals from danger 3.4 Monitor constantly the condition of all clients , staff and others assisting 3.5 Acquire and document the information required to assist emergency services , where relevant 3.6 Notify, where required, emergency services 3.7 Alter the plan of action to accommodate changes in the situation variables 3.8 Demonstrate casualty evacuation methods where relevant to the context 3.9 Implement organisational procedures and policies and legal requirements in the event of a major injury or death
4 Debrief the emergency	4.1 Notify management authorities 4.2 Obtain the information appropriate to be given to facility or land management authorities 4.3 Debrief clients and others directly involved and make arrangements for further counselling, if required 4.4 Advise clients and others directly involved to refer media enquires to a

	nominated spokesperson

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Clients	[all categories] • participants in an activity or program • colleagues • small group or larger group • experienced or inexperienced
Contextual issues	[all categories] • factors that may impact on the context ○ acceptability to group/party members ○ degree of urgency ○ time constraints ○ impact on the environment
Development of the emergency situation	[all categories] • identify potential for development of an emergency ○ spread of fire ○ threat to adjoining areas ○ danger of explosion ○ loss of communications ○ involvement of additional persons
Emergency	[three categories] • types ○ fire ○ hazardous releases, chemical spills ○ bomb threats ○ civil disorder ○ medical, eg, bites, stings, epileptic fit, heart attack ○ injuries ○ panic and other emotional responses ○ equipment failure ○ lost party or party member ○ result of environmental conditions, eg, heat, cold, wet, snow, wind, blizzards, lightning, bushfires, floods, high seas ○ activity - specific, eg, stranded, 'frozen' or wedged participant
Emergency reports and signals	[all categories] • observation • verbal

	• emergency warning system • emergency alarm system • hand signals • verbal reports • telephone communications • radio communications • whistles
Emergency Services	[all categories] • identify local emergency services ○ Police Search and Rescue ○ State Emergency Service ○ Fire Brigade ○ Ambulance Service ○ Land Management Authorities, eg, National Parks, Forestry ○ Australian Volunteer Coastguard • communication methods
Hazards	[all categories] • identify hazards ○ biological ○ chemical ○ mechanical ○ electrical ○ thermal ○ explosive ○ structural ○ climatic ○ psychological, eg, critical incident stress ○ nuclear ○ security related ○ wildlife related
Management authorities	[all categories relevant to one sector of sport and recreation industry] • varies according to context ○ facility owners ○ City Councils, Local Government authorities ○ National Parks and Forestry services ○ Fisheries departments ○ private land owners, crown land lessees, Defence forces ○ Aboriginal communities, ○ Water authorities ○ Commissions, eg, hydro - electricity, alpine resort
Occupational health and safety requirements	[all categories] • State/Territory/Commonwealth legislation • Australian Standards • Occupational Health and Safety legislation • industry codes of practice

	organisation's policies and procedures
Personal protective equipment and clothing	[all categories] - fire - fighter protective clothing - helmets - boots - gloves - breathing apparatus - protective clothing - protective hose lines or sprays - safety eye washes - safety showers - activity-specific equipment
Plan of action	[all categories] - varies according to the situation - search procedures, ie, search of likely routes followed, systematic search, voice or whistle contacts - evacuations - control of fire - administering of first aid - assistance to injured party member - retrieval of party member - activity - specific rescue techniques - organisation procedures
Relevant people	[all categories] - to assist evaluation - other emergency team members - emergency response related persons as detailed in emergency procedures
Resources	[all categories] - human resources - other clients/group members - client's experience - physical resources - food - equipment
Situation variables	[all categories] - capabilities of the group/clients - weather conditions - topography - time frame for survival - other time factors - human resources - available food and water

	• size of search area • time of day • communications facilities and difficulties • emotional and physical condition of the clients/group

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of potential emergency situations within the community recreation, fitness, outdoor recreation or sport industry sectors and must confirm the ability to apply knowledge of emergency procedures to the management of activity-specific emergencies - Assessment of performance should be over a minimum of two (2) different occasions covering the prescribed number of categories from the Range Statements - Assessment must confirm the ability to apply this knowledge and appropriate techniques to - accurately evaluate the emergency - avoid/control escalation of the emergency - develop a plan of action decisively - efficiently implement a plan of action - deal with contingencies
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - SRXFAD001A Provide first aid
Required knowledge and skills	- Required knowledge - First aid knowledge appropriate to the location and level of responsibility - Use of communications equipment relevant to the location - Safety procedures near rescue equipment - Organisational and legal policies and procedures in the event of an accident/incident - Activity specific rescue techniques and/or emergency techniques specific to a sector of the sport and recreation industry - Procedures to deal with death of a client - Required skills - First aid skills appropriate to the location and level of responsibility - Activity specific rescue techniques or emergency response techniques - Adaptability and resourcefulness to improvise resources and cope with contingencies - Problem solving and contingency management - Local call out procedures to access emergency services personnel
Resource implications	- Physical resources - assessment of this unit of competency requires access to - emergency response equipment appropriate to the learner's work environment, ie, within the community recreation, fitness, outdoor recreation or sport industry - organisation procedures - Human resources - assessment of this unit of competency will require

	human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above (ie SRXEMR002A) ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as variations in demands of emergency situations, this unit of competency must be assessed over a minimum of two (2) simulated emergency situations in order to ensure consistency of performance over the Range Statements, contexts and types of emergency situations applicable to a particular work environment within the sport or recreation industry
Context for assessment	• For valid and reliable assessment this unit of competency must be assessed in the context of a real work environment with simulated emergencies using real emergency response equipment. The environment should be safe, with conditions normally experienced within an activity in the workplace • Assessment of this unit of competency will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	-	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Observing and assessing information in an emergency situation in order to implement appropriate control procedures • Communicating ideas and information - Communicating clearly and concisely with others directly and indirectly involved in the emergency according to organisation procedures • Planning and organising activities - Developing and implementing a plan of action decisively • Working with teams and others - Planning and communicating with emergency teams and others to effect emergency response • Using mathematical ideas and techniques - Not applicable • Solving problems - Quickly implementing contingency plans if the planned course of action is unsafe • Using technology - Selecting and using appropriate emergency response equipment Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEMR002A	COORDINATE EMERGENCY RESPONSE
EMR	Emergency response

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to coordinate a response to an emergency situation, in accordance with an organisation's policies and procedures.

ELEMENT	PERFORMANCE CRITERIA
1 Coordinate response to emergency reports or signals	1.1 Identify and action emergency reports and signals 1.2 Attend, where appropriate, emergency stations and operate according to procedures 1.3 Assess emergency situations and report details according to procedures 1.4 Coordinate emergency response actions according to procedure
2 Anticipate the behaviour and characteristics of typical emergencies	2.1 Conduct an examination of the situation 2.2 Establish emergency action plan based on current situation and possible development 2.3 Prioritise needs promptly and accurately
3 Coordinate and apply operating instructions	3.1 Implement organisational emergency procedures and policies 3.2 Apply occupational health and safety requirements and safe working practices
4 Coordinate the rescue procedure	4.1 Determine and coordinate the safe use of emergency equipment 4.2 Supervise equipment selection to match the type of emergency 4.3 Supervise selection of rescue technique to ensure safety and effectiveness 4.4 Improvise where necessary, equipment and technique
5 Coordinate, initiate and control evacuation	5.1 Refer situations beyond the capability of the emergency team promptly to the appropriate authorities for assistance 5.2 Provide information and assistance to relevant authorities 5.3 Control and coordinate, if necessary, emergency evacuation to organisational procedures or directions from relevant authorities 5.4 Arrange and coordinate the welfare of non-evacuated persons
6 Coordinate operational procedures	6.1 Maintain an operational log throughout the rescue activity or complete immediately thereafter 6.2 Advise emergency team members to refer media inquiries to the nominated spokesperson

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Development	[all categories] • potential incidents ○ spread of fire ○ threat to adjoining areas ○ danger of explosion ○ loss of communications and involvement of additional persons • possible causes ○ environmental conditions ○ human intervention
Emergency equipment	[all relevant categories] • according to local policy ○ hoses, hose reels ○ monitors ○ foam equipment and extinguishers ○ blankets ○ spill kits ○ personal protective clothing/equipment ○ ladders ○ salvage gear ○ rescue equipment ○ first aid and evacuation equipment/resources
Emergency evacuation	[all categories] • total • partial • to an external refuge • to an internal refuge
Emergency situations	[three categories] • fire • hazardous releases and uncontrollable processes • smoke spread • bomb threats or civil disorder • environmental, eg, severe storms, earthquakes, floods • other natural or man-made disasters • specific emergencies occurring during participation in/conduct of sport and recreation activities

Emergency stations	[all relevant categories] • emergency warning and control points • assembly points • fire points • appropriate locations specific to the sport or recreation activity ○ locations on the field, court, etc ○ in the outdoor environment, eg, in the bush, in snow, on water, in caves, positions along the edge of the water, at the top or base of a pitch ○ locations in the gymnasium or fitness centre ○ sites specified in a recreation centre
Occupational health and safety requirements	[all categories] • State/Territory legislation • Australian Standards • Occupational Health and Safety (OH&S) legislation • industry codes of practice • organisation's procedures
Procedures	[all categories] • practices (may be written or verbal) • instructions outlining the organisation's fire and/or emergency procedures • practices and/or operating instructions and/or procedures for emergency control equipment
Reports and signals	[three categories] • observation • verbal • emergency warning system • emergency alarm system • hand signals • verbal reports • telephone communications • radio communications • whistles
Welfare	[all categories] • relocating evacuated person to other areas • advising relatives • arranging transport and collecting personal items

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the organisation's procedures and relevant Occupational Health and Safety (OH&S) legislation to assess emergency situations and coordinate a response to emergency situations within the community recreation, fitness, outdoor recreation or sport industry • Assessment of performance should be over a sufficient period of time covering all categories of each Range Statements that are applicable to coordinating a response to a range of emergency situations in the learner's work/industry environment and should simulate realistic situations • Assessment must confirm the ability to apply this knowledge and appropriate techniques to ○ emergency procedures applicable to the coordination of general and sport or recreation activity-specific emergencies ○ classify the emergency and recognise situations that must not be attacked because of risk of life ○ recognise hazards and precautions to be taken during emergency response and actions to take in response to developing situations ○ anticipate the escalation/development of the emergency situation ○ correctly apply operating procedures, occupational health and safety requirements and legislation to the coordination of a response ○ supervise the correct use of rescue techniques and equipment ○ recognise equipment operation characteristics, limitations and procedures ○ identify damaged, faulty or unserviceable equipment and recognise the hazards involved with the use of emergency equipment ○ assess the need, type and level of evacuation and apply correct emergency evacuation procedures ○ understand and/or use emergency evacuation signals or alarms ○ maintain an operational log of the emergency actions ○ deal with media inquiries in accordance with the organisation's procedures
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Activity specific or community recreation/fitness/outdoor recreation/sport specific emergency response or rescue units • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXOHS002B Implement and monitor the organisation's Occupational Health and Safety policies, procedures and programs
Required knowledge and skills	• Required knowledge ○ First aid knowledge and procedures ○ Use and location of emergency equipment ○ Organisational and legal policies and procedures in the event of an accident/incident

	○ Activity specific rescue techniques relevant to the situation ○ Legal requirements in the event of a death ○ Relevant emergency response agencies within the activity area/location and the process to contact them ○ Organisation's emergency plan, contingency plan and evacuation plan ○ Factors that impact on an emergency situation ● Required skills ○ First aid procedures appropriate to the activity location ○ Activity specific rescue techniques ○ Problem solving to assess emergency situation and develop action plan ○ Contingency management ○ Adaptability and resourcefulness to improvise equipment/techniques ○ Communication strategies according to emergency procedures
Resource implications	● Physical resources - assessment of this competency requires access to ○ emergency response procedural documents ○ equipment appropriate to the learner's work environment, ie, within the community recreation, fitness, outdoor recreation or sport industry ○ information on Occupational Health and Safety requirements ● Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	● Due to issues such as variations in emergency situations, this unit of competency must be assessed over a period of time sufficient to ensure consistency of performance over the Range Statements, contexts and types of emergency situations applicable to a particular work environment within the sport and recreation industry
Context for assessment	● For valid and reliable assessment this unit of competency must be assessed in a real work environment using realistic simulated emergency situations. The environment should be safe, with conditions normally experienced in a sport and recreation workplace ● This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes ● Where performance is not directly observed and/or is required to be demonstrated over a "period of time" and/or in a "number of locations", any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	3	3	2	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting and analysing information in a particular emergency situation and organising the information in order to coordinate a response • Communicating ideas and information - Communicating an action plan in accordance with organisational procedures to all relevant stakeholders as well as contingency plans if the need arises • Planning and organising activities - Planning emergency equipment needs and organising appropriate human resource needs to implement an emergency response • Working with teams and others - Planning and communicating with peers/colleagues and other emergency personnel according to organisational procedures • Using mathematical ideas and techniques - Calculating rescue equipment requirements • Solving problems - Problems are solved that may arise during the implementation of emergency procedures such as improvising rescue equipment • Using technology - Technology for sourcing appropriate information and communicating during an emergency Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEMR003A	ADMINISTER OXYGEN IN AN EMERGENCY SITUATION
EMR	Emergency response

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers competency in advanced techniques for management of the administration of oxygen and ventilation of the lungs in line with the requirements of the Australian Resuscitation Council and state/ territory regulatory bodies. Expired air resuscitation is covered in the prerequisite unit SRXFAD001B Provide first aid.

ELEMENT	PERFORMANCE CRITERIA
1 Assess casualty and develop management plan	1.1 Undertake assessment of casualty including vital signs, details of incident, medical/casualty history, physical appearance and other signs and symptoms 1.2 Develop a management plan taking into account available equipment, condition of patient and special requirements of certain conditions 1.3 Assist, where possible, casualty to a comfortable position suitable for implementation of management plan 1.4 Encourage and reassure casualty as necessary to facilitate effective treatment 1.5 Arrange medical aid as soon as possible consistent with maintaining casualty safety
2 Check equipment	2.1 Undertake a pre-use check of safety and potential effectiveness of equipment in accordance with operating procedures, Australian Standards and regulatory requirements 2.2 Diagnose minor faults and carry out repairs in accordance with operating procedures to restore equipment to working order 2.3 Report/record faults and defects according to organisational procedures
3 Maintain unobstructed airway	3.1 Clear and maintain airway using non-intervention techniques where possible 3.2 Take appropriate steps to reduce risk to self or others of contamination by the casualty's body fluids
4 Resuscitate casualty	4.1 Use, where appropriate, face masks and other barriers according to Australian Resuscitation Council standards
5 Use oxygen to provide therapy	5.1 Use, where indicated, oxygen therapy in the ventilation of casualty 5.2 Where appropriate use advanced techniques
6 Recover and restore equipment	6.1 Clean, discard or disinfect, restock and/or replenish and store equipment safely according to organisation procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Advanced techniques	[two categories] for management of administration of oxygen and/ or ventilation of the lungs - oxygen therapy - ventilation of the lungs by expired air resuscitation without oxygen added using ancillary device - ventilation with ambient air by an operator powered resuscitation – bag, valve or mask - ventilation by an oxygen powered resuscitator
Barriers	[two categories] - facemasks - unidirectional valves - bi-directional valves - filters
Casualty	[two categories] - adults - small children under eight years - newborn babies - infants
Non-intervention techniques	[all categories] - for maintenance of unobstructed airway - head tilt - jaw support - jaw thrust
Oxygen equipment	equipment which is used for storage and delivery of oxygen for medical purposes
Pre-use check	[all categories] - checking existence of suitable prominent warnings about precautions to be observed - checking for damage - to replenish and/or restore

Regulatory requirements	[all categories] • Australian Resuscitation Council • relevant state/territory regulatory bodies
Report/record faults and defects	[all categories] • verbal • filling out and processing standard form

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 Statements.

Critical aspects of evidence	- Assessment must confirm sufficient knowledge of the use of oxygen equipment in accordance with relevant standards and guidelines in the work environment - Assessment of performance should be over a minimum of two (2) different occasions covering all categories from the Range Statements - In particular, assessment must confirm the ability to - accurately assess the casualty's condition - check and use equipment correctly - clear and maintain an unobstructed airway - use oxygen therapy, where indicated, according to Australian Resuscitation Council standards - clean, disinfect, restock and/or discard equipment
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - SRXFAD001A Provide first aid - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - SRXEMR002A Coordinate emergency response
Required knowledge and skills	- Required knowledge - Respiratory system - lungs, air passages - Importance of oxygen to the body - Causes of hypoxia and hypoxic hypoxia - The mechanism of respiratory - Possible causes of hyperventilation - Indicators of obstructed breathing - Significance of respiratory noises lower airways diseases - Signs and symptoms of chronic obstructed airways disease and chronic airways lesions (COAD/CAL) - Management of COAD/CAL casualties - Correct use of oxygen cylinders and devices - Estimation of duration of oxygen supply - Precautions for safe storage and handling of oxygen cylinders - Resuscitation and kits – specifications, principle of operation and troubleshooting - Techniques and maintenance of unobstructed airway - Australian Resuscitation Council standards - Australian standards relevant to resuscitation equipment - Required skills - Reading oxygen content gauges - Determining oxygen pressure and volume content of cylinders - Use of resuscitation equipment
Resource Implications	- Physical resources - assessment of this competency requires access to - resuscitation equipment/kit - Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team)

	must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency of performance	• Due to issues such as demonstrating correct technique on persons of different physique, this unit of competency must be assessed over a minimum of two (2) different occasions in order to ensure consistency of performance over the Range Statements and contexts applicable to applying techniques for management of the administration of oxygen and ventilation of the lungs
Context of assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding the patient from bystanders • Communicating ideas and information - Reassuring patient throughout procedure • Planning and organising activities - Planning resuscitation sequence • Working with teams and others - Obtaining assistance from a bystander to call for medical assistance • Using mathematical ideas and techniques - Reading oxygen volume left in cylinders • Solving problems - Dealing with minor faults in oxygen equipment • Using technology - Using a bag to administer oxygen Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

ENVIRONMENT

Contents

BSBCMN109A Follow environmental work practices.....	1
BSBCMN215A Participate in environmental work practices	7
BSBCMN313A Maintain environmental procedures	13
BSBCMN413A Implement and monitor environmental policies	20
BSBMGT507A Manage environmental performance	27
BSBMGT610A Manage environmental management systems	36

BSBCMN109A	FOLLOW ENVIRONMENTAL WORK PRACTICES
ENV	Environment

DESCRIPTION: This unit covers the recognition of environmental policies and procedures in the workplace. Those who work directly under instruction would be advised to undertake this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Recognise workplace procedures	1.1 Workplace procedures and work instructions for environmental work practices are recognised and followed, while under direct supervision, and clarification sought where necessary 1.2 Environmental hazards in the workplace are recognised while under direct supervision and reported to designated personnel according to workplace procedures 1.3 Changes to work practices and procedures are responded to positively and promptly in accordance with organisational requirements
2 Make suggestions	2.1 Environmental policies are recognised and issues are discussed with designated personnel 2.2 Suggestions are made for improvements to workplace practices where possible

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 general awareness issue rather than a major part of the competencies • be consistent with the concept that people at this level work under direct supervision and under instruction
Workplace procedures and work instructions	may include • procedures for hazard and risk identification and for avoiding or minimising environmental risks • written or verbal procedures and instructions • signs, eg, toxic or hazardous chemicals • hazard and incident reporting procedures • procedures to be followed if spills or accidents occur • environmental reporting procedures where applicable
Clarification may involve questioning or requesting information	from • designated personnel (as described elsewhere) • other team members
Environmental hazards or risks	may include but are restricted to • spills, leaks, storm water pollution • unplanned emissions • accidents
Environmental policies or procedures	may address • environmentally sustainable work practices

	• reduction of waste • minimisation of risks and maximisation of opportunities
Some workplace approaches to environmental policies or procedures	could include • preventing and minimising the production of pollution ○ 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 effectively
Designated personnel	may include • people who are responsible for work area • or who may be assigned to act as a mentor/trainer to a person under supervision
Suggestions	may include ideas that help to • prevent and minimise risks and maximise opportunities • reduce waste • reduce use of non-renewable resources
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of environmental policies and procedures in the workplace • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ recognise and follow workplace procedures while under direct supervision, to recognise hazards, and report to designated personnel as instructed ○ be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science • Australian Qualifications Framework Level 1 there is an exception that a person will be able to recognise, in broad terms only, that environmental policies, hazards and risks exist. There is no requirement for a wide ranging knowledge of environmental issues or policies
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN215A Participate in environmental work procedures ○ BSBCMN106A Follow workplace safety procedures
Required knowledge and skills	• Required Knowledge ○ Relevant legislation from all levels of government which affect 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 ○ Awareness of environmental hazards/risks associated with own workplace ○ Knowledge of personal and collective responsibility for welfare of self, others, environment ○ Relevant environmental systems and procedures for own work area ○ Knowing people responsible for own work area for reporting to in regard to environmental issues and to clarify issues ○ Reporting procedures • Required skills ○ Ability to recognise procedures and follow instructions ○ Communications skills to enable questions and clarifications relating to work requirements ○ Literacy skills to interpret workplace information ○ Ability to relate to people from a range of social, cultural and

	ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 - Assessment of performance requirements in this unit should be undertaken in actual workplace or simulated environment - Assessment should reinforce the integration of the key competencies and common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To recognise hazards and opportunities • Communicating ideas and information - To recognise environmental issues and report as required • Planning and organising activities - To participate in workplace procedures for own work area • Working with teams and others - To contribute to responsible workplace practices • Using mathematical ideas and techniques - To recognise workplace information • Solving problems - To recognise and report risks/hazards • Using technology - To access workplace information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN215A	PARTICIPATE IN ENVIRONMENTAL WORK PRACTICES
ENV	Environment

DESCRIPTION: This unit covers the identification and application of environmental policies and procedures in the workplace. Those who work under instruction but are not generally responsible for others would be advised to undertake this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Follow workplace procedures for environmental work practices	1.1 Workplace procedures and work instructions for work practices with potential environmental impacts are recognised and followed accurately 1.2 Environmental hazards in the workplace are recognised and reported to designated personnel according to workplace procedures 1.3 Changes to work practices and procedures are responded to positively and promptly in accordance with organisational requirements
2 Participate in the improvement of environmental work practices	2.1 Environmental issues are raised with designated personnel in line with workplace policies and practices 2.2 Suggestions are made for improvements to workplace practices where applicable
3 Maintain environmental records	3.1 Environmental records are maintained as required according to organisational policies and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 • 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 supervision and according to workplace procedures
Workplace procedures and work instructions	may include • procedures for hazard and risk identification and for avoiding or minimising environmental risks • signs, eg, toxic or hazardous chemicals • procedures to be followed if spills or accidents occur • written or verbal procedures and instructions • hazard and incident reporting procedures • environmental reporting procedures where applicable
Environmental hazards or risks	may include but are not restricted to • spills, leaks, pollution • planned and unplanned emissions • accidents
Designated personnel	may include • people who are responsible for work area • or who may be assigned to act as a mentor/trainer to a person under instruction
Environmental issues	may include

	• environmentally sustainable work practices • reduction of waste • minimisation of environmental risks and maximisation of opportunities to improve business environmental performance and to promote more efficient consumption of natural resources
Suggestions	may include ideas that help to • prevent and minimise risks and maximise opportunities • reduce waste • reduce use of non-renewable resources • make more efficient use of resources • improve environmental performance
Some workplace approaches to environmental policies or procedures	could include • preventing and minimising the production of pollution ○ discharges to air ○ land and water ○ hazardous waste • improving housekeeping, eg, using a broom instead of toxic cleaners or water • substituting materials, eg, replacing toxic solvent based coatings with water based ones • changing processes, eg, mechanical cleaning, redesign products to use materials more efficiently
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge for identification and application of environmental policies and procedures in the workplace • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ follow workplace procedures according to instructions given, to recognise hazards, and report to designated personnel as instructed and to participate in the improvement of environmental work practices at own level of responsibility ○ be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science • N.B. at Australian Qualifications Framework ○ there is an expectation that a person will be able to recognise, that environmental policies, hazards and risks exist and respond as required. There is no requirement for a wide ranging knowledge of environmental issues or policies
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN313A Maintain environmental procedures ○ BSBCMN211A Participate in workplace safety procedures
Required knowledge and skills	• Required 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 ○ Knowledge of environmental hazards/risks associated with own workplace ○ Relevant environmental systems and procedures for own work area ○ Reporting procedures • Required skills ○ Ability to recognise procedures, follow instructions and respond to change ○ Communications skills to enable questions and clarifications relating to work requirements ○ Literacy skills to interpret workplace information ○ Ability to relate to people from a range of social, cultural and

	ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	In order to achieve consistency in 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 for 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 - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To recognize hazards and opportunities • Communicating ideas and information - To raise environmental issues and report as required • Planning and organising activities - To participate in workplace procedures • Working with teams and others - To contribute to responsible workplace practices • Using mathematical ideas and techniques - To interpret workplace information • Solving problems - To recognise and report risks/hazards • Using technology - To access workplace information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM313A	MAINTAIN ENVIRONMENTAL PROCEDURES
ENV	Environment

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Maintain workplace procedures	1.1 Workplace procedures and work instructions for environmental work practices for own work area or team are conveyed to work team where applicable and are followed accurately 1.2 Existing and potential environmental risks are identified, dealt with where possible, and reported to designated personnel, and dealt with 1.3 Required changes to workplace practices/procedures are responded to promptly and positively 1.4 Contingency plan is implemented immediately when unplanned incidents occur
2 Support continuous improvement	2.1 Environmental performance for own work area is monitored and recorded 2.2 Information is gathered and improvements are suggested to support the development of improved work practices 2.3 Environmental training needs of the work team where applicable, and self are identified and further training is sought as required
3 Maintain recording procedures	3.1 Environmental records are accurately and legibly maintained and stored securely in a form accessible for reporting purposes 3.2 Internal and external reporting procedures are identified and maintained as required

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 • 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, eg, 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 - 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
The sport and recreation industry	covers industry sectors of community recreation, fitness, outdoor recreation and sport

	• significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge on the maintenance and monitoring of the organisation's environmental policies and procedures • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm 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 must be kept ○ be strictly relevant to the particular workplace role and is not intended to include detailed technical aspects of environmental science
Interdependent assessments of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN215A Participate in environmental work practices ○ BSBCMN413A Implement and monitor environmental policies ○ BSBCMN311A Maintain workplace safety
Required knowledge and skills	• Required 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 • Required skills ○ Communication skills to ensure information is supplied to the workgroup ○ Literacy skills for comprehending documentation and interpreting environmental 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	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 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 in the Range Statements - Assessment must take account of the endorsed assessment guidelines - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To maintain workplace procedures • Communicating ideas and information - To resolve environmental issues and to report as required • Planning and organising activities - To maintain procedures and support change and improvement • Working with teams and others - To gain support in maintaining and improving procedures • Using mathematical ideas and techniques - To aid planning • Solving problems - To maintain procedures • Using technology - To assist work tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN413A	IMPLEMENT AND MONITOR ENVIRONMENTAL POLICIES
ENV	Environment

DESCRIPTION: 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 expect to work in a supervisory capacity would be advised to undertake this unit. It could also be useful for small business.

ELEMENT	PERFORMANCE CRITERIA
1 Provide information to the work team	1.1 Information provided to the work team is explained in a clear and concise manner and is readily accessible by all employees 1.2 Organisation's activities/performance in regard to environmental management and business sustainability are conveyed to work team where required 1.3 Links between environmental, financial, safety and other risk areas and how these are integrated in organisational policies and practices are explained 1.4 Information on environmental systems and procedures and other risk areas within the area of management responsibility is provided
2 Implement and monitor operational procedures	2.1 Existing and potential environmental risks are identified and assessed and/or expert advice sought as required 2.2 Prioritised recommendations from the assessments are carried out as part of the organisation's operational procedures 2.3 Organisational environmental policies and procedures are implemented 2.4 Tasks are allocated and outcomes are monitored in accordance with organisational policies and targets 2.5 Contingency plan is implemented promptly when incidents occur
3 Implement and monitor change and continuous improvement	3.1 Environmental improvement plans are implemented for own work group and integrated with other operational activities 3.2 Best practice approaches to improving environmental performance by reducing environmental risk and waste are identified, implemented and monitored 3.3 Suggestions and ideas about environmental management are sought from the work team and acted upon where appropriate 3.4 Suggestions are sought from supply chain , at tender/contract stage, for ways of improving environmental performance
4 Implement and monitor recording procedures	4.1 Internal and external reporting procedures are identified and implemented as required 4.2 Environmental records are accurately and legibly maintained and stored securely in a form accessible for reporting purposes 4.3 Information/records are monitored to identify trends that may require remedial action, and used to promote continuous improvement of environment performance
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

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 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 ◦ discharges to air

	○ 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
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 sources 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 ○ 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 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
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge for the implementation and monitoring of the organisation's environmental policies and procedures • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ◦ implement and monitor integrated environmental management policies and procedures within an organisation. The work team must be informed of the environmental and other risk areas, training needs must be addressed and records must be kept
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ◦ Nil • This unit must be assessed in conjunction with the following unit(s) ◦ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ◦ BSBCM313A Maintain environmental procedures ◦ BSBMGT506A Manage environmental performance ◦ BSBCM411A Monitor a safe workplace
Required knowledge and skills	• Required 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 • Required 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	• Physical resources - assessment of this competency requires access to ◦ appropriate documentation and resources normally used in the workplace

	- Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of the unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To provide information and advice • Communicating ideas and information - To resolve environmental issues with the work team and external contacts • Planning and organising activities - To plan training and to implement change and improvement • Working with teams and others - To gain support for environmental policies • Using mathematical ideas and techniques - To aid planning • Solving problems - To implement change and maintain procedures • Using technology - To assist implementation Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBMGT507A	MANAGE ENVIRONMENTAL PERFORMANCE
ENV	Environment

DESCRIPTION: 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 business.

ELEMENT	PERFORMANCE CRITERIA
1 Develop a business plan to enhance environmental performance	1.1 A business plan is developed that reflects the organisation's policies and commitment to environmental sustainability as an integral part of business operations 1.2 Procedures are developed to maximise/enhance integration of environment, finance, safety and other areas of impacts and opportunities 1.3 Procedures are developed to maximise environmental opportunities and minimise environmental impacts , and expert advice is obtained as required 1.4 Continuous improvement policies and practices monitor and report on the environmental performance of the organisation 1.5 The organisation's activities and products are designed to minimise life cycle impacts 1.6 Financial and human resources for the operation of environmental systems are identified, sought and/or provided as required 1.7 Changing trends and opportunities relevant to the organisation are identified, analysed and taken into account at the planning stage
2 Manage environmental impact and opportunity	2.1 Identification and assessment of existing and potential environmental impacts and opportunities is conducted and advice is sought as required 2.2 Procedures for ongoing management of environmental impacts and opportunities is conducted and advice is sought as required 2.3 Environmental procedures are addressed at the planning, design and evaluation stages of any change in the workplace to ensure that ongoing impacts and opportunities are identified 2.4 Contingency plans are established to manage impacts and opportunities when long-term solutions are not readily available 2.5 Ongoing training program is developed to identify and fulfil employee's environmental training needs
3 Promote innovation and opportunity	3.1 Continuous improvement and sustainable innovation are promoted as an essential part of doing business 3.2 Procedures are developed to analyse and communicate the costs and benefits of innovations and improvements 3.3 New ideas are actively sought and entrepreneurial behaviour is encouraged in employees, workplace committees and teams 3.4 Procedures are established to actively seek the support of the supply chain for implementing sustainable innovation and continuous improvement 3.5 Members of the supply chain are encouraged to meet high standards of environmental performance
4 Manage system to record and report environmental	4.1 System is managed to record and report environmental performance as an integral part of the organisation's record keeping and performance evaluation system

impacts and opportunities	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

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 • 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, ie, 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	and may include

may be established at management level	- 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 programs	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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers

	• high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to communicate in the workplace • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm 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 ○ be strictly relevant to the particular management role and is not intended to include detailed technical aspects of environmental science ○ demonstrate 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
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBMGT505A Ensure a safe workplace ○ BSBMGT609A Manage risk ○ BSBMGT610A Manage environmental management systems
Required skills and knowledge	• 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 ○ Environmental sustainability as a 'whole-system' approach ○ Quality assurance procedures ○ Strategies to maximise opportunities and minimise environmental impact ○ Relevant training and record keeping concepts ○ Relevant knowledge of environmental issue especially in regard to water catchments, air, noise, ecosystems, habitat, waste minimisation ○ Relevant knowledge of ecological systems in regard to business operation • Required 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 are identified ○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 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 • 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 for the particular Australian Qualification Framework. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To aid planning • Communicating ideas and information - To promote environmental policies • Planning and organising activities - To develop environmental management strategies • Working with teams and others - To control impacts, maximise opportunities and to gain support for management strategies • Using mathematical ideas and techniques - To aid planning • Solving problems - To develop management strategies and operational procedures • Using technology - To access and record information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBMGT610A	MANAGE ENVIRONMENTAL MANAGEMENT SYSTEMS
ENV	Environment

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Establish an environmental management system	1.1 Environmental management policies that reflect the organisation's commitment to environmental sustainability are developed 1.2 Environmental sustainability is identified as an integral part of business planning and promoted as a business opportunity 1.3 Policies encourage all stakeholders to meet high standards of environmental performance and to support sustainable innovation and continuous improvement 1.4 Policies and procedures are established to incorporate and support triple bottom line principles 1.5 Policies are established which maximise opportunities and minimise environmental impacts 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
2 Manage innovation and improvement	2.1 Changing trends and opportunities relevant to the organisation are identified, evaluated and taken into consideration for ongoing improvement programs 2.2 Continuous improvement and sustainable innovation are promoted as an essential part of doing business and as a context for assessment and planning of environmental performance 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 2.4 A systems is established to analyse and communicate the costs and benefits of innovations and improvements and to measure, monitor and record environmental performance 2.5 Performance benchmarks and indicators are established and targets are set to maximise continuous improvement
3 Review environmental management system	3.1 Processes are developed to ensure that an integrated ongoing review is part of the organisation's policy and procedures 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

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 policies	must be • relevant to the organisation's operations and must be appropriate to the scope and scale of the business
Environmental management policies	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 • 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 resources 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 may improve/enhance • corporate image • staff morale • cost reduction • product differentiation/branding • identification of market potential

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 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge required to communicate in the workplace - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm 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 - be strictly relevant to the particular management role and is not intended to include detailed technical aspects of environmental science - understand 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
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBMGT505A Ensure a safe workplace - BSBMGT507A Manage environmental performance - BSBMGT609A Manage risk
Required knowledge and skills	- Required knowledge - 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 catchment, air, noise, ecosystems, habitat, waste minimisation - Relevant knowledge of ecological systems in regard to business operation - Required 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To aid planning and development of management systems • Communicating ideas and information - To promote environmental policies as an integral part of the organisation's operations • Planning and organising activities - To develop environmental management strategies • Working with teams and others - To negotiate, consult and to gain support for environmental issues • Using mathematical ideas and techniques - To aid planning and development • Solving problems - To develop management strategies • Using technology - To access and record information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

EVENTS

Contents

CUEFOH1A Respond positively to patrons.....	1
CUEFOH2A Sell products/services to patrons.....	7
CUEFOH3A Operate box office.....	14
CUEFOH4A Usher patrons	22
CUEFOH5A Provide security services	28
CUEFOH6A Manage front of house.....	35
SRXEVT001B Coordinate guest/delegate registrations at venue	42
SRXEVT002B Organise meeting/event and provide on-site meeting/event management services.....	49
SRXEVT003B Coordinate events.....	56
SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals.....	62
SRXEVT005B Manage special events	69
SRXEVT006B Plan, implement and evaluate an event or program.....	75
SRXEVT007B Manage spectators at an event or program.....	83
SRXEVT008A Process and monitor event registrations	90
SRXEVT009A Develop a transport strategy for an event.....	95
SRXEVT010A Manage an event across a number of facilities	103
SRXEVT011A Environmental issues and events	110
SRXEVT012A Liaise with state/local government agencies	117
THHGCS05B Organise in-house functions.....	123
THTFME02B Provide on site meeting/event management services	130
THTFME03A Develop and update events industry knowledge.....	136
THTFME04A Develop an event concept.....	142
THTFME05A Select event venues and sites	148
THTFME06A Manage event contractors	154
THTFME07A Organise and monitor infrastructure for outdoor events	160
THTFME08A Integrate technology into the event management process	166

THTFME09A Develop and update knowledge of protocol	171
THTPPD08B Plan and develop meeting, event proposals and bids	177
THTPPD09B Develop conference programs	182
THTPPD10B Develop and implement sponsorship plans	187

CUEFOH1A	RESPOND POSITIVELY TO PATRONS
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge required to respond in a positive manner to patrons. This includes dealing with different cultural backgrounds, special needs and requests or complaints of patrons.

ELEMENT	PERFORMANCE CRITERIA
1 Greet patrons	1.1 Patrons are greeted in a polite and welcoming manner and in accordance with organisation procedures 1.2 Where appropriate, regular patrons are recognised and greeted accordingly 1.3 Patrons requiring special assistance are handled with care and consideration in accordance with organisation procedures
2 Provide information and advice to patrons	2.1 Requests for information are responded to politely and appropriate information is communicated accurately, clearly and concisely 2.2 Requests for information are relayed to other appropriate personnel as required 2.3 Any change to schedule/program/venue and the reason for the variation is communicated clearly and politely, cooperation of patrons is sought in the implementation of any change and patrons are addressed as required 2.4 Patrons are informed of organisation's products and services on request
3 Respond to patrons' complaints	3.1 Patron's complaints or concerns are responded to promptly, calmly and courteously 3.2 Nature of the complaint is established and clarified with patron as required 3.3 Dissatisfied patrons are responded to in accordance with organisation procedures or initiative is exercised as required 3.4 Appropriate action is taken to remedy the situation and prevent the risk of recurrence as necessary

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Patrons	may include those from a range of cultural • customs • backgrounds • protocols • etiquette
Patrons with special needs	may include • people with disabilities • first-time patrons • aged or children/school groups • infants • Very Important Persons (VIPs) • groups may require • wheelchair access • hearing assistance • translation assistance
Appropriate personnel	may include • reception • box office • ushers • food/beverage counter staff • supervisor • management • police • security personnel
Requests for information	may include • opening hours • pricing • enquiries • session start/finish times • directions both within and outside the venue • seating arrangements • group-booking information • facilities • special-access requirements, eg, wheelchair access

	• changes to schedules/venues/programs • details of shows/performance/events • the range of products and services available
Organisation's services and products	may include • performances/seasons/next show/sessions • retail/merchandising • catering • publications • lost property • ticketing services
Oral communication tasks	may include • responding to patrons' requests for directions, event durations, venue geography, emergency help or help from other appropriate personnel • providing information accurately in plain English with sensitivity to the needs of people from a range of cultural and linguistic backgrounds and people with intellectual or physical disabilities • verbally conveying information on changes to schedules, programs, venues • providing information about services and products • asking questions to gain accurate information and clarify ambiguities • accurately receiving and passing on requests and statements to confirm they have been correctly understood • providing accurate, concise summaries of information in brief verbal reports • negotiating outcomes where points of view differ • recognising and responding to the requests, questions and statements of patrons disquieted or annoyed by changes to program, schedule, cast or venue
Material to be read	may include • written changes to schedules, programs, venues • information about services and products • organisational policies and procedures • notices, correspondence and other written instructions

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to support patrons and respond positively to their needs and wants • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ understand communication and customer service and its importance in an entertainment context ○ display a positive and pleasant attitude ○ understand the importance of maintaining a high standard of personal presentation (eg, in wearing of uniforms and personal grooming) ○ know and be aware of cultural diversity
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following units ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units ○ CUEIND1A Apply organisation and industry knowledge ○ CUECOR1A Work with others ○ THHCOR03A Follow health, safety and security procedures
Required knowledge and skills	• Required knowledge ○ Organisational procedures relating to customer service ○ Knowledge of organisation's products and services ○ Understanding of the requirements of patrons with special needs] ○ Cultural sensitivity • Required skills ○ Communicating effectively including active listening and questioning techniques and non verbal communication ○ Responding effectively to a range of different customer service situations ○ Dealing with conflict ○ Giving and following instructions ○ Communicating effectively with people from divers cultural backgrounds ○ Dealing and rectifying cross cultural miscommunication
Resource implications	• Physical resources - assessment of this competency requires access to ○ relevant organisation procedures ○ access to an entertainment event or venue or simulated situation • Human resources - assessment of this competency will require ○ access to a range of patrons with a range of requirements ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the

	industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	-	1	-	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CUEFOH2A	SELL PRODUCTS/SERVICES TO PATRONS
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge required to sell products and/or services to patrons.

ELEMENT	PERFORMANCE CRITERIA
1 Sell products/services to patrons	1.1 Patrons are greeted according to organisational procedures 1.2 Appropriate product/service is prepared/provided in response to patron's request 1.3 Equipment is operated as required according to organisational procedures 1.4 Hygiene procedures are followed in preparing products as required 1.5 Products/services are sold at the correct price as determined by the organisation 1.6 Correct change or documentation for credit card charge and/or receipts are given to patrons as required 1.7 Enquires/requests from patrons are handled in accordance with organisational procedures and referred to appropriate personnel as required 1.8 Lost property is handled according to organisational procedures as required 1.9 Cleaning/tidying is undertaken as required
2 Manage cash and sales	2.1 Cash register is turned on and staff identification entered into system if required 2.2 Sales equipment is checked to ensure that it is in working order and faults are fixed or reported to the appropriate personnel as required 2.3 Float is counted to ensure that it tallies with stated amount and is placed as appropriate in cash register 2.4 Cash register is operated according to organisational procedures 2.5 Total price of items and change is calculated without the use of a cash register where required
3 Reconcile sales returns	3.1 Till is balanced according to organisational procedures 3.2 Reconciliation slip is completed as required 3.3 All cash and documentation is given to the appropriate personnel

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Patrons	may include - patrons from different cultural backgrounds - patrons with special needs
Products/services	may include - consumables - hot and cold food - drinks including alcoholic beverages - tickets - programs - merchandise - cloakroom - lost property - taxi-booking service - valet car parking - binocular hire
Equipment	may include - coffee maker - popcorn maker - frozen Coke machine - ice-cream machine - drinks machine
Hygiene products	may include - federal, state, local or Organisational Health and Safety procedures regarding handling of consumables - organisation procedures
Customer may pay for products/services	by - cash - cheque - Electronic Funds Transfer Point of Sale (EFTPOS) - credit card - money orders - travellers cheques - vouchers or coupons

Appropriate personnel	may include • supervisor • front-of-house manager • other management
Organisational requirements/procedures	may cover • billing • credit • cancellations • amendments • refunds • cheques • credit cards • Electronic Funds Transfer Point of Sale (EFTPOS) • cash • vouchers
Operating a cash register according to organisational procedures	may include • straight sales • multiple items • refunds • voucher and coupon sales • voiding sales • issuing receipts • calculating change • processing discounts • completing credit transactions • using fast-track banking terminal • changing the register roll
Balancing the till	may include • adding up all register sales • adding up all cash • credit slips and vouchers • subtracting the float amount from total money received • comparing revenue to sales, filling in reconciliation slip, handing reconciliation slip along with all cash, vouchers and credit slips to the relevant person
Oral communication	may include • responding to instructions • speaking clearly to be understood, and listening carefully to understood • asking questions to gain information, clarify ambiguities and adequately understand requirements • asking the right questions to elicit patron's special needs • rephrasing and repeating back questions, requests and statements to confirm they have been correctly understood • empathising with the patron's situation while upholding venue or hirer

	policy • accurately receiving and passing on requests and instructions • accurate, concise summarising of information in brief verbal reports to other personnel (such as reporting a fault) • responding to requests for directions, venue geography, emergency help of help from other appropriate personnel • providing information about services and products
Material to be read	may include • product lists, price lists, product tags, supplier information • information about the venue and products and service available • credit forms • vouchers and coupons • on-screen instructions and prompts • equipment manuals • organisational policies and procedures
Material to be written	may include • information on products for sale • memos about faulty equipment • credit forms • vouchers and coupons • reconciliation sheet • memos about patron's special needs • short reports or memos about complaints and inquiries • short reports of memos about errors or discrepancies in the till
Numeracy tasks	include • calculating prices of products/services • counting money • calculating correct change • balancing of till, involving calculation of total revenue and reconciliation to monies received
Demonstration of cultural awareness	may include • arranging for special or attendance requirements of particular cultural groups ○ separating men and women ○ separating different nationalities • dealing with patrons who have not attended a venue before, and who are unfamiliar with venue customs • listening accurately to information, requests and instructions spoken with accents, or by people with intellectual disabilities • rephrasing statements, speaking clearly and using plain English, so as to be understood by patrons for whom English is not their first language • demonstrating awareness of special needs of people with disabilities • communicating effectively with a range of patrons

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of selling products and/or services to patrons • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ provide products/services to patrons quickly and efficiently ○ display a positive and pleasant attitude ○ respond effectively to a range of different customer service situations ○ understand the importance of maintaining a high standard of personal presentation (eg, in wearing of uniforms and personal grooming) ○ understand communication and customer service and their importance in an entertainment context ○ communicate effectively with people from a diverse range of backgrounds ○ demonstrate cultural sensitivity
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ CUEFOH1A Respond positively to patrons ○ CUEIND1A Apply industry and organisation knowledge ○ CUECOR1A Manage own work and learning ○ CUECOR2A Work with others
Required knowledge and skills	• Required knowledge ○ knowledge of organisation's range of products and services ○ knowledge of prices of organisation's products and services ○ knowledge of laws controlling the sale of alcohol and tobacco ○ knowledge of hygiene procedures (organisation and/or legislative requirements) ○ knowledge of effective communication techniques including listening and questioning techniques and non-verbal communication • Required skills ○ processing credit card/Electronic Funds Transfer Point of Sale (EFTPOS) transactions using appropriate equipment ○ cash handling procedures ○ using cash registers ○ operating front of house/refreshment counter equipment - food and drink machines ○ working as part of a team ○ performing simple mathematical calculations and financial transactions ○ handling potential conflict situations

	○ following instructions ○ applying problem-solving and negotiation techniques ○ accurately relaying requests and information
Resource implications	• Physical resources - assessment of this competency requires access to ○ entertainment event or venue simulated situation using a range of products/services, organisational procedures and equipment • Human resources - assessment of this competency will require ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competency in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CUEFOH3A	OPERATE BOX OFFICE
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge required to successfully operate a box office including dealing with patrons, tickets and money.

ELEMENT	PERFORMANCE CRITERIA
1 Provide information to patrons	1.1 Familiarisation with all aspects of the sale occurs 1.2 Information is provided to patrons as requested 1.3 Recommendations are offered to patrons for alternative or future events where appropriate 1.4 Requirements of patrons with special needs are considered as appropriate 1.5 Any problems are dealt with as required and/or referred to the appropriate personnel
2 Sell and issue tickets	2.1 Checking ensures that required equipment and materials are available and operational before opening ticket sales 2.2 Type of ticket required by the patron is accurately identified 2.3 Patron booking information is sought and recorded as required 2.4 Tickets/receipts are issued in accordance with customer requirements and ticketing system 2.5 Payment arrangements are confirmed 2.6 Relevant organisational procedures are followed during selling and issuing of tickets
3 Manage float	3.1 Float is made up to meet estimated selling requirements and maintained to ensure adequate cash is available to provide change for patrons 3.2 Float is made up and cash is handled according to organisational procedures 3.3 correct change or documentation for credit card is given to patrons 3.4 Tickets and cash/receipts are balanced in accordance with established ticketing and cash handling purposes 3.5 Float is presented to the appropriate personnel for checking and security purposes

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Familiarisation with all aspects of the sale	may include • seating configuration/plan of the house • seats for sales • box plan • commencement times • length of event • number of seats available • type of event • cost of tickets • viewing restrictions
Information to be provided to patrons	may include • event content • event times • locations • prices • discounts and concessions • seating options and availability • viewing restrictions • non-event information eg, car parking
Patrons with special needs	may include • people with disabilities • aged or children/school groups • infants • Very Important People (VIPs) • groups may require • wheelchair access • hearing assistance • translation assistance
Booking information	may include • the patron's name and address • number of tickets required • the date and time of event • seat preferences • concession information

	• special needs • credit card details
Selling and issuing tickets	may take place • over the counter/face to face • via telephone • via fax or modem • via mail • via the internet • via other technology
Tickets	may also be • sold by a ticketing agency may be issued • manually • through a ticketing software system may be • pre-paid • full price • discounted • concession • free • group bookings
Required equipment and materials	may include • computer hardware • computer software • credit card transaction machine • credit card sales documentation • point of sales selling documentation
Ticketing software systems	may include • Bocs • Ticketmaster • Select • Globe • Softix
Payments	may be received by • cash • credit card • cheques • vouchers

	• Electronic Funds Transfer Point of Sale (EFTPOS) • money orders
Organisational procedures	may include those relating to • billing • credit • cancellations • exchanges/amendments • refunds
Appropriate personnel	may include • supervisor • front-of-house manager • management • other front-of-house staff
Oral communications tasks	may include • speaking clearly to be understood, and listening carefully to understand • receiving booking information from the patron • asking questions to gain information, clarify ambiguities and adequately understand patron requirements in the minimum time required to courteously and accurately complete a transaction • asking the right questions to elicit special needs • explaining venue layout, seating options and venue or hirer seating policy • rephrasing and repeating back questions, requests and statements to confirm they have been correctly understood • emphasising with the patron's situation while upholding venue or hirer policy (as in the case of refund requests) • providing accurate, concise summaries of information in brief verbal reports • stating opinions and points of view in a cooperative, constructive manner • negotiating outcomes where points of view differ • dealing with potential conflict situations
Material to be read and interpreted	may include • on-screen instructions and prompts • seating plan • production information file • refund policy and procedure • cash register operating procedures • equipment manuals • written changes to schedules, programs, venues • information about services and products • other organisational policies and procedures • parts of hiring agreement relevant to box office • specifications for seating • performance sales report • information about future events at the venue

Material to be written	may include • notes and workbook entries of things observed, activities undertaken • changes to venue, schedule, program • memos about patron's special needs • seating advice • short reports, memos • sale summaries • short notes to patrons about future events
Numeracy tasks	may include • calculating ticket prices • counting money • calculation of tickets sold in different categories of seating, often in response to immediate demands from promoters • calculating ticket refunds
Cultural awareness	may include • facilitating special seating or attendance requirements of other cultures (such as separating men and women, separating different nationalities) • dealing with patrons who have not attended a venue before, not dealt with a box office and who are unfamiliar with venue customs • listening accurately to information, requests and instructions spoken with accents, or by people with intellectual disabilities • rephrasing statements, speaking clearly and using plain English, so as to be understood by patrons for whom English is not their first language • responding to special needs of people with disabilities

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of operating a box office • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ◦ communicate effectively with customers within the range of situations required for the job role ◦ respond effectively to a range of situations ◦ understand communication and customer service and their importance in a entertainment context ◦ know and understand cultural diversity and deal with and rectify cross cultural miscommunication
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ◦ Nil • This unit must be assessed in conjunction with the following unit(s) ◦ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ◦ CUEFOH6A Manage front-of-house ◦ THHCOR02A Work in a socially diverse environment
Required knowledge and skills	• Required knowledge ◦ Knowledge of the organisation and its products/services ◦ Knowledge of all aspects of sales appropriate to the job role as specified in the Range Statements • Required skills ◦ Operating relevant equipment and materials appropriate to the job role as specified in the Range Statements ◦ Greeting patrons according to organisational procedures ◦ Communicating effectively including active listening, questioning and non-verbal communication ◦ Using booking systems appropriate to the job role ◦ Using telephone systems and handling telephone enquiries ◦ Cultural sensitivity ◦ Solving problems ◦ Accurately relaying requests and information ◦ Communicating effectively with people from diverse cultural backgrounds
Resource implications	• Physical resources - assessment of this competency requires access to ◦ entertainment event or venue or simulated situation using a range of equipment, material, ticketing systems, tickets and organisational procedures as identified in the Range Statements • Human resources - assessment of this competency will require ◦ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the

	industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Contexts for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CUEFOH4A	USHER PATRONS
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge associated with ushering patrons and its surrounding duties.

ELEMENT	PERFORMANCE CRITERIA
1 Check and process tickets	1.1 Patrons are met and greeted in a manner that achieves and maintains customer satisfaction 1.2 Tickets/passes are checked for accuracy and validity, processed in accordance with organisational procedures and appropriate action is taken as problems arise 1.3 Information is provided to patrons as required
2 Seat patrons	2.1 Patrons are encouraged to enter the appropriate location in accordance with public announcements 2.2 Queues are dealt with efficiently and quickly 2.3 Crowd movement is monitored and action to disperse bottlenecks is taken 2.4 Patrons receive instructions on seat location or are guided to seats as appropriate 2.5 Any seating problems are dealt with according to organisational procedures 2.6 Patrons with special needs are identified and seated at the most appropriate time for the comfort and convenience of all parties 2.7 Latecomers are dealt with tactfully according to organisational procedures 2.8 Enquiries and/or complaints are dealt with in an informative, accurate and polite manner and referred to the appropriate personnel as required
3 Carry out other duties	3.1 The closing of venue doors is carried out as required 3.2 Lost property is handled according to organisational procedures 3.3 Cleaning/tidying of venue is undertaken as required 3.4 Emergency evacuation procedures are followed in the event of an emergency 3.5 Patrons are assisted in vacating the venue at the end of the performance/event as required

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Information provided to patrons	may include • cloakroom arrangements • correct venue entrance • asking questions to gain information and clarify ambiguities • refunds to other appropriate personnel
Tickets	may be • collected or not according to organisation's policies
Patrons	may include those from a range of cultural • customs • backgrounds • protocols • etiquette
Special access	requirements may include • wheelchair access • hearing assistance • translation assistance
Appropriate personnel	may include • front-of-house manager • management • other front-of-house staff
Material to be read	includes • tickets • passes
Material to be written	includes • short reports • memos about complaints and inquiries

Numeracy tasks	may include counting • tickets • stubs
Oral communications tasks	which include • listening to instructions • speaking clearly to be understood, and listening carefully to understand • asking questions to gain information and clarify ambiguities • empathising with the patron's situation while upholding venue or hirer policy • accurately receiving and passing on information in brief verbal reports • accurate, concise summary of information in brief verbal reports • stating opinions and points of view in a cooperative, constructive manner • instructing or negotiating to move incorrectly seated patrons, often in the dark
Cultural awareness	may include • dealing with patrons who have not attended a venue before, and who are unfamiliar with venue customs • listening accurately to information, requests and instructions spoken with accents, or by people with intellectual disabilities • rephrasing statements, or speaking slowly and clearly and using a limited vocabulary, so as to be understood by patrons for whom English is not their first language • awareness of special needs of people with disabilities • dealing with anger or intimidation

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of ushering patrons • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ understand the importance of maintaining a high standard of personal presentation (eg, in wearing of uniforms and personal grooming) ○ display a positive and pleasant attitude ○ usher patrons quickly and efficiently to meet performance/event schedules ○ communicate effectively within the range of situations required for the job role ○ understand communication and customer service and their importance in an entertainment context ○ deal effectively with cultural diversity
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following units of competency ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units ○ CUEIND1A Apply organisation and industry knowledge ○ THHCOR03A Follow health, safety and security procedures ○ CUEFOH1A Respond positively to others ○ CUECOR2A Work with others
Required knowledge and skills	• Required knowledge ○ Knowledge of organisational procedures ○ Knowledge of layout and venue including location of exits, seating layout, other facilities ○ Knowledge of emergency evacuation procedures ○ Understanding of the requirements of patrons with special needs ○ Knowledge of cultural diversity • Required skills ○ First aid procedures ○ Ability to apply emergency evacuation procedures ○ Communicating effectively including active listening, questioning and non verbal communication ○ Dealing with conflict ○ Ability to demonstrate cultural sensitivity and respond to special needs ○ Giving and receiving spoken and/or written instructions ○ Work cooperatively as part of a team
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require

	○ access to a range of patrons, in a range of circumstances in an entertainment event or venue or simulated situation ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	-	1	-	1	-
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CUEFOH5A	PROVIDE SECURITY SERVICES
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge required to provide security services.

ELEMENT	PERFORMANCE CRITERIA
1 Provide security services	1.1 Entry points to venue are controlled 1.2 Queues are controlled firmly and courteously 1.3 Identification and access authorisation is checked and authorised personnel only are given access to restricted areas 1.4 Access to the auditorium is restricted until clearance procedures are implemented as required 1.5 Emergency and safety procedures are implemented as required 1.6 Patrons are observed and monitored and any irregularities are handled or referred to the appropriate personnel 1.7 Protection of performers and/or patrons, crew and other personnel is considered and responded to as required 1.8 Communication and other security equipment is used in accordance with organisational procedures as required
2 Control and respond to potentially disruptive behaviour	2.1 Potentially disruptive elements are identified and reported to the appropriate personnel as required 2.2 Search procedures are implemented in accordance with organisational procedures 2.3 Confiscated goods are dealt with appropriately 2.4 Level of nuisance is assessed in accordance with organisational procedures and support is gained from the appropriate personnel as required 2.5 Appropriate action is taken to diffuse a threatening situation

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Entry points	may include • public entrance • stage door • fire exits
Items to be confiscated	may include • cameras • recording devices, eg, cassette/video recorders • umbrellas • drinks • food • telecommunication equipment, eg, mobile phones, pagers • dangerous or illegal items, eg, drugs, weapons, other items that are potential weapons
Irregularities	may include • stealing • possession of illegal substances • aggressive behaviour
Emergency and safety situations	may include • failure of heating/cooling systems • fire • natural disasters • bomb threats • power cuts • danger to venue/buildings • illness or death of patron/client • accidents
Emergency and safety procedures	may include • administering first aid • calling fire service • calling police or security service • calling ambulance or medical assistance • calling other emergency services

Security equipment	may include • computer access systems • surveillance video • smoke and fire detectors • hazard warning system • clocks • keys • barriers and gates • emergency cods and contact numbers within venue and to contracted security company • telephones • radios and pagers
Appropriate personnel	may include • front-of-house manager • venue management • other security staff • medical personnel • crowd control staff • police
Material to be read and interpreted	may include • instructions about which personnel have access to which areas • event information sheet • documentation on badge and tag identification systems • site plans, building plans • clearance procedures • memos or notices about security and threats to security • emergency evacuation procedures • standing and immediate instructions about security, including personal searching and the handling of confiscated items • tickets, passes and invitations • organisational policies and procedures
Material to be written	may include • short reports about matters with legal or organisational implications (such as occupational health and safety matters, incident reports)
Numeracy tasks	may include • responding to patrons' or others' reasons for requesting access • giving information about why access is denied to particular areas • giving directions to other areas of the venue, use of two-way radio requiring special skills such as use of special language, and quick and succinct expression • liaising with other workers via radio or other means, and coordinating actions, to control the flow of patrons inside or outside the venue • providing accurate and useful answers to questions • listening to instructions

	• issuing instructions in such a way as to elicit the cooperation of others to carry them out • issuing clear, firm and non negotiable instructions in the case of emergencies • speaking clearly to be understood, and listening carefully to understand • asking questions to gain information, clarify ambiguities and adequately understand requirements • asking the right questions to elicit special needs • communicating directly with nominated people (such as performers) only as absolutely necessary and according to appropriate protocols • rephrasing and repeating back questions, requests and statements to confirm they have been correctly understood • empathising with the patron's situation while upholding venue or hirer policy (as in the case of denying access to restricted areas) • dealing with patrons and others with patience and courtesy
Cultural awareness	may include • dealing with patrons who have not attended a venue before, and who are unfamiliar with venue customs • listening accurately to information, requests and instructions spoken with accents, or by people with intellectual disabilities • rephrasing statements, or speaking slowly and clearly and using plain English, so as to be understood by patrons for whom English is not their first language • awareness of special needs of people with disabilities • communicating effectively with patrons when faced with a potential conflict situation • awareness of cultural differences that may give rise to threatening situations (such as differences between nationalities or ethnic groupings within nationalities) • knowing how body language and touch is interpreted by other cultures common in the patronage

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of providing security services • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ communicate effectively within the range of situations required for the job roles ○ consistently apply effective conflict resolution techniques ○ respond quickly and calmly to unexpected events ○ deal with cross-cultural miscommunication
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THHCOR03A Follow health, safety and security procedures ○ CUEIND1A Apply organisation and industry knowledge ○ CUEFOH1A Respond positively to patrons ○ CUECOR2A Work with others
Required knowledge and skills	• Required knowledge ○ Knowledge of organisational security procedures ○ Knowledge of relevant organisational and legislative occupational health and safety requirements ○ Knowledge of contacting emergency services ○ Knowledge of the layout of the venue including fire and safety exits ○ Knowledge of effective communication techniques including listening, questioning and non-verbal communication • Required skills ○ First aid procedures ○ Cultural sensitivity
Resource implications	• Physical resources - assessment of this competency requires access to ○ a range of circumstances as identified in the Range Statements • Human resources - assessment of this competency will require ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the

	<i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
-	1	-	1	-	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

CUEFOH6A	MANAGE FRONT OF HOUSE
EVT	Events

DESCRIPTION: This unit outlines the skills and knowledge required to prepare staff and venue for an event and to manage front of house, administrative procedures and stock control.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare venue for patrons	1.1 Liaison with the appropriate personnel ensures that venue is adequately prepared for patrons in accordance with organisational procedures 1.2 Venue is opened as required
2 Manage front of house	2.1 Checking ensures that all staff are present 2.2 Appropriate action is taken as required if staff have not arrived for work 2.3 Staff are briefed according to organisational procedures prior to opening of venue and debriefed as required at the end of the event 2.4 Public announcements are made as required 2.5 All enquiries and complaints are handled informatively and politely and referred to the appropriate personnel if required 2.6 Venue is checked to ensure that it is in appropriate condition for patrons 2.7 Emergency procedures are activated as required 2.8 Venue is closed as required at end of event according to organisational procedures
3 Undertake administrative procedures	3.1 Rosters are prepared as required and distributed to the appropriate personnel 3.2 Staff time cards are checked and validated as required 3.3 Incident reports are written, distributed to the appropriate personnel and filed according to organisational procedures 3.4 Relevant information is distributed to staff as required
4 Undertake stock control	4.1 Inventories are maintained to ensure that all stock required for front-of-house operations is listed 4.2 Ordering of stock is undertaken as required in accordance with organisational procedures 4.3 Staff are instructed to carry out stocktake according to organisational procedures 4.4 Staff are instructed to ensure that wastage and out of date stock is recorded, expiry dates noted and stock is rotated accordingly 4.5 Staff are instructed to ensure that display and shelved stock is rotated on a first in, first out 4.6 Stock is monitored to ensure that popular and unpopular selling items are identified and the appropriate action is taken

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Preparation of venue	may include • setting up/preparing cloakroom • food and drink bars • setting up promotional displays • checking that venue is clean and tidy • cleaning and tidying venue or instructing other staff to clean and tidy venue
Staff briefing	may include • details of event • fire drills • house policies • any information required
Appropriate action	may include • organising temporary cover either through an agency or from existing casual or full-time staff • dividing tasks between staff • doing work oneself
Relevant information	may include • information about products and services available • the venue • organisational policies and procedures • seating arrangements • forthcoming events • special needs of particular patrons • equipment manuals • attendance records
Appropriate personnel	may include • management • front-of-house staff • box-office staff
Stock	may include • tickets

	• programs • vouchers • promotional material • food and drink • alcohol • office supplies
Information required by other personnel	may include • information about products and services available, the venue, organisational policies and procedures, seating arrangements, forthcoming events, special needs of particular patrons (or groups of patrons) • equipment manuals • attendance records
Material to be read and interpreted	may include • all material that is required to be read by other workers reporting to the front-of-house administrator • written requests for equipment from venue hirer • contracts and other written methods of ordering goods and services • merchandising display requirements • attendance records and rosters • merchandise stock lists • seating plan and other specifications for seating • organisational policies and procedures
Material to be written	may include • simple correspondence on behalf of the organisation • short reports or memos to other personnel, including instructions to technical staff • short reports about matters with legal implications (such as Occupational Health and Safety matters, incidents reports) • short reports and correspondence in relation to patron enquiries • orders and other written methods of ordering goods and services • organisational procedures • seating advice • stock inventories
Numeracy tasks	may include • calculation of hours of attendance and related timekeeping calculations • basic counting relating to stocktakes
Oral communication tasks	may include • briefing staff and responding to feedback constructively • providing accurately and useful answers to questions • giving and receiving instruction • telephone liaison

	• speaking clearly to be understood, and listening carefully to understand • asking questions to gain information and clarify ambiguities • asking the right questions to elicit special needs • rephrasing and feeding back questions, requests and statements to confirm they have been correctly understood • empathising with the patron's situation while upholding venue or hirer policy • accurate, concise summarising of information in brief verbal reports • negotiating outcomes where points of view differ
Cultural awareness	may include • understanding of barriers that may prevent staff participation in training and non-mandatory work-related activities • understanding of what constitutes reasonable expectations of staff • understanding the expectations of other personnel, including venue hirers

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to manage front of house • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ supervise staff ○ manage work to achieve goals and results ○ resolve conflict ○ know and understand cultural diversity
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ CUEFOH3A Operate box office ○ THHGLE05A Roster staff ○ CUEOHS1A Implement workplace health, safety and security procedures
Required knowledge and skills	• Required knowledge ○ Knowledge of organisational procedures ○ Knowledge of and ability to apply emergency evacuation procedures ○ Maintaining a safe workplace ○ Writing reports • Required skills ○ maintaining contact details of staff ○ rostering staff ○ negotiating with suppliers regarding supply of stock ○ communicating effectively including active listening, questioning and non-verbal communication ○ delegating tasks ○ responding quickly and calmly to unexpected events ○ inventory and stock control procedures ○ demonstrating cultural awareness
Resource implications	• Physical resources - assessment of this competency requires access to ○ all the resources required to manage front-of-house for an entertainment event of venue • Human resources - assessment of this competency will require ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements

	for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Contexts for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment, the sport and recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT001B	COORDINATE GUEST/DELEGATE REGISTRATIONS AT VENUE
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to prepare registrations and coordinate the on-site registration of guests/delegates at a meeting or event.

ELEMENT	PERFORMANCE CRITERIA
1 Plan registration process	1.1 Establish the database in accordance with agreed procedures and requirements for a specific meeting/event 1.2 Receive registrations and process accurately in accordance with agreed procedures and timelines 1.3 Action accommodation and travel requirements in accordance with agreed procedures 1.4 Report special delegate requirements to suppliers 1.5 Issue confirmations in accordance with agreed procedures and within designated timelines 1.6 Undertake, where necessary, action to boost numbers in accordance with instructions 1.7 Distribute documents and other materials to registered delegates/guests in accordance with requirements of the specific meeting/event
2 Prepare for registration	2.1 Prepare all materials and equipment required for registration and check prior to the meeting/event 2.2 Check arrangements for set up of registration area and confirm with the venue in accordance with agreed procedures 2.3 Confirm access details with the venue
3 Set up registration area	3.1 Check registration location and set up in accordance with pre-arranged requests to venue 3.2 Check set up to ensure safety of guests/delegates and colleagues including those with disabilities 3.3 Erect signage as per agreed requirements 3.4 Install equipment and check its working order prior to commencement of meeting/event 3.5 Prepare materials and position appropriately within the registration areas 3.6 Undertake, where appropriate, familiarisation of the venue
4 Process registrations	4.1 Welcome guests/delegates in a courteous and friendly manner 4.2 Answer Guest/delegate questions in relation to the meeting/event correctly and politely 4.3 Check and record details in accordance with agreed registration procedures 4.4 Identify discrepancies and action with minimum disruption to the guest/delegate 4.5 Record 'no shows' accurately 4.6 Advise guests/delegates accurately on features of the meeting/event and venue and provide with the appropriate materials 4.7 Monitor Registration numbers and report accurately on a regular basis to appropriate colleagues/clients/supplier
5 Finalise registrations and	5.1 Finalise registration details within designated timelines 5.2 Produce name tags and other individual delegate documentation accurately

produce materials	and check in accordance with agreed style for a specific meeting/event 5.3 Produce guest/delegate reports/lists to include all required information

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Access details	[all categories] - time access is available for set up - access time on day of meeting/event - contact person at venue
Action to boost numbers	[two categories] - increase publicity - phone prospective delegates - discount registration fee - group registration fee - offer free registration to sponsors/staff
Database	[one category] - manual - automated
Documents and other materials	[four categories] - name tags - delegate kits - guest/delegate lists - agenda - travel and accommodation confirmations - venue details - parking details
Instructions	[one category] - written - verbal - supervisor - manager
Materials and equipment	[two categories] - computer - promotional display materials - stationery - signage

	• cash float
Registrations	[one category] • manual • automated
Safety	[all categories] • access to venue is clear and complies with Occupational Health and Safety (OH&S) procedures • equipment leads are taped down or covered with a mat • adequate space is left between tables and chairs • passage ways and corridors are clear • overhanging equipment and decorations are securely attached • signage is secure
Timelines	[all categories] • Organisation's procedures for the receipt, processing and confirmation of registrations for meetings/events within a time that allows all necessary action to be completed before the meeting/event

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of planning and coordinating the on-site registration of a meeting or event in the work environment • Assessment of performance should be over a period of time covering all categories of all Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ prepare all materials and equipment necessary for the successful operation of a meeting or event ○ liaise with the venue management to ensure all arrangements are understood ○ ensure all signage and equipment are set up and checked in advance of the meeting/event ○ ensure all safety/risk issues associated with the meeting/event are identified and corrected ○ accurately process registrations and produce accurate registration materials within organisation acceptable timeframes ○ use typical meeting/event registration systems ○ effectively solve problems as they arise in the administration of meeting/event registration
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Organisation's policy and procedures for coordinating a meeting/event ○ Organisation's policy and procedures for the receipt and processing of registrations for meetings/events ○ Organisation's policy and procedures for arranging travel and accommodation ○ Registration procedures for a range of meetings/events ○ Development of promotional displays and material ○ Occupational Health and Safety and risk management procedures for coordination of meetings/events • Required skills ○ Organisational skills in terms of event planning ○ Use of technology and equipment for coordination of meetings/events ○ Referral skills to identify to whom to refer difficulties with the venue or equipment ○ Research skills to seek information on the most appropriate promotional materials to use at the meeting/event ○ Problem solving skills to identify the best course of action if a piece of equipment does not work correctly and best course of

	○ action to boost delegate numbers (if required) ○ Literacy skills to clarify information in regard to registered guests/delegates
Resource implications	• Physical resources - assessment of this competency requires access to ○ a meeting or event with commonly used registration facilities and equipment • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with a variety of venues and client groups, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to preparing registrations and coordinate the on-site registration of guests/delegates at a meeting or event
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding anticipated numbers of guests/delegates • Communicating ideas and information - Liaising with venue regarding specific requirements • Planning and organising activities - Planning venue layout • Working with teams and others - Dealing with organisations/venues to coordinate event • Using mathematical ideas and techniques - Calculating size of venue required • Solving problems - Dealing with 'no shows' at the event • Using technology - Using a computer spreadsheet to track delegates and their requirements Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT002B	ORGANISE MEETING/EVENT AND PROVIDE ON-SITE MEETING/EVENT MANAGEMENT SERVICES
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to organise meetings/events and manage the actual preparation, set up and operation of a meeting or event within a sport and recreation organisation.

ELEMENT	PERFORMANCE CRITERIA
1 Co-ordinate meeting/event bookings	1.1 Answer enquires for meeting/event bookings courteously and correctly 1.2 Discuss meeting/event requirements with clients and offer advice to assist them in planning the meeting/event 1.3 Hold, where necessary consultations with colleagues to discuss clients requirements and how these can be met 1.4 Consider size and style of facilities and explain to the clients before accepting bookings for meeting/events 1.5 Show, where appropriate, facilities to clients 1.6 Record bookings accurately and confirm with the clients in accordance with organisation's procedures 1.7 Agree details with the client and confirm in writing, including deposit and final payment requirements
2 Arrange meeting/event details	2.1 Pass on information to all appropriate colleagues to ensure effective planning of meeting/event elements 2.2 Identify and organise staffing needs 2.3 Consider possible effects of special meeting/events on other clients and take appropriate action 2.4 Identify, where appropriate, the need for the services of external suppliers and make bookings and confirm in writing 2.5 Organise special stock requirements in a timely fashion 2.6 Prepare the meeting/event sheet in consultation with appropriate colleagues 2.7 Confirm all details on the meeting/event sheet with the client 2.8 Distribute meeting/event sheets in accordance with meeting/event and organisation requirements 2.9 Hold, where appropriate, briefings to ensure the smooth running of the meeting/event
3 Prepare for on-site management	3.1 Develop plans for on-site management in accordance with agreed procedures for meeting/event 3.2 Check final arrangements for all aspects of the meeting/event 3.3 Create/collate materials to facilitate effective on-site management 3.4 Brief operational staff prior to the meeting/event
4 Oversee meeting/event set up	4.1 Establish contact with nominated supplier personnel at the appropriate time and reconfirm/agree requirements 4.2 Make and agree, where necessary, adjustments with the supplier 4.3 Check all aspects of set up in accordance with pre-arranged agreements 4.4 Check all aspects of set up to ensure safety of guests/delegates and colleagues including those with disabilities 4.5 Identify promptly deficiencies and discrepancies and take action to rectify the situation

	4.6 Brief, where appropriate, additional on-site staff on required details of the meeting/event operation
5 Monitor and evaluate meeting/event operation	5.1 Monitor set up and conduct of the meeting/event to ensure service meets clients needs and is in accordance with agreed requirements 5.2 Monitor sessions and activities throughout the meeting/event 5.3 Identify Problems promptly and take action to resolve the situation 5.4 Identify additional requirements and organise promptly 5.5 Undertake liaison with client throughout the meeting/event to ensure it is progressing to their satisfaction 5.6 Obtain feedback from clients and operations staff and use information in future meeting/event organisation 5.7 Undertake liaison with all suppliers on an ongoing basis to ensure delivery of services 5.8 Finalise meeting/event in accordance with organisation procedures
6 Oversee meeting/event breakdown	6.1 Oversee break down of meeting/event in accordance with agreements 6.2 Pack and remove materials and equipment in accordance with agreements 6.3 Check the venue to ensure items and belongings are not left behind 6.4 Conduct, where appropriate, de-briefing with suppliers 6.5 Check and sign accounts in accordance with supplier agreements 6.6 Note outstanding items for action for further action

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Aspects of set up	[all categories] • availability of all materials and equipment • room set ups • staging • technical equipment • display and signage • food and beverage arrangements • registration areas
Break down	[all categories] • agreed time • agreed personnel • ensuring security of all materials • in accordance with venue requirements
Client	[one category] • internal manager • sponsor • client
Facilities	[four categories] • meeting room • hall • ballroom • theatre • sound equipment • lighting equipment • podium • stage • audio visual equipment • projection equipment • display stands
Meeting/event	[one category] • breakfasts • lunches • dinners • seminars

	• conferences • cocktail parties • product launches • presentations • meetings • information sessions • events
Meeting/event requirements	[all categories] • menus • style and format of occasion • layout of room • technical requirements • timing details including access and break down
Safety	[all categories] • access to venue is clear and complies with Occupational Health and Safety (OH&S) procedures • equipment leads are taped down and/or covered with a mat • adequate space is left between tables and chairs • passage ways and corridors are clear • overhanging equipment and decorations are securely attached • signage is secure
Special meeting/events	[one category if relevant] • clients in competition with sponsors • meeting/events of a political nature or message • meeting/events involving children • meeting/events involving animals
Staffing needs	[all categories] • number of staff required • skills of staff required • staff rosters
Supplier	[four categories] • venues • speakers • staging and audio visual suppliers • display suppliers • caterers • entertainers • equipment hire companies

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of organising meetings/events in the work environment • Assessment of performance should be over a period of time covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ demonstrate the ability to tailor the services of the organisation to meet clients needs ○ demonstrate knowledge of the types and range of meeting/event services that may be required ○ conduct the entire meeting/event organisation process and ensure meeting/event services meet the agreed requirements of clients ○ manage the on-site operation of a meeting or event including all aspects of preparation, set up, operation and move out ○ ensure meeting/event information is presented accurately ○ effectively solve problems as they arise during the conduct of meetings/events
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT001B Coordinate guest/delegate registration at venue • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THHGCS05B Organise in-house functions ○ THTFME09A Develop and update knowledge of protocol
Required knowledge and skills	• Required knowledge ○ Organisation's policy and procedures for the booking, coordination and management of meetings/events, including procedures for the distribution of meeting/event sheets ○ Organisation's policy and procedures for contracting suppliers and processing of accounts ○ Registration procedures for a range of meetings/events ○ Knowledge of typical food and beverage requirements for meeting/events ○ Knowledge of typical technical requirements and layouts for meeting/events ○ Development of promotional displays and material ○ Public relations knowledge for servicing of clients ○ Occupational Health and Safety (OH&S) and risk management procedures for coordination of meeting/events • Required skills ○ Planning and organisational skills in relation to meeting/event planning and management of on-site activities ○ Use of technology and equipment for coordination of meeting/events ○ Referral skills to identify to whom to refer difficulties with the venue or equipment ○ Negotiation skills in relation to on-site activities ○ Research skills to seek information on the most appropriate

	○ promotional materials to use at a meeting/event ○ Problem solving skills to identify the best course of action if meeting/event is not running as planned, including equipment does not work during a meeting/event, and/or insufficient staff or food arrives ○ Literacy skills to clarify information in regard to the use of technical equipment necessary for a meeting/event ○ Numeracy skills in regard to checking the accuracy of accounts
Resource implications	• Physical resources - assessment of this competency requires access to ○ meetings and events in a variety of meeting/event facilities • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with a variety of client groups with differing needs, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to organise meetings/events and manage the actual preparation, set up and operation of a meeting or event within a sport and recreation organisation
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information on client's requirements • Communicating ideas and information - Liaising with client, staff and suppliers • Planning and organising activities - Planning details of meeting with client • Working with teams and others - Working with staff to deliver customer requirements • Using mathematical ideas and techniques - Calculating numbers of staff required • Solving problems - Dealing with late client requests • Using technology - Using email to communicate with client Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT003B	COORDINATE EVENTS
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills required to conduct market research and identify possible gaps in the delivery of special events, and the coordination and evaluation of such a special event.

ELEMENT	PERFORMANCE CRITERIA
1 Analyse opportunities to organise special events	1.1 Assess the current market for events planned in a similar field and identify 'gaps' in the delivery of service 1.2 Prepare recommendations based on research and present to designated person(s)
2 Prepare brief	2.1 Identify available resources , assess the financial situation and consider timeframes 2.2 Draft brief, budgets and timeframes in line with research results and in accordance with the goals and objectives of the organisation
3 Coordinate details and delegate duties to team members	3.1 Delegate various details of the event organisation to team members with guidelines provided for achieving goals within designated timelines 3.2 Identify individual differences and abilities from appropriate roles and responsibilities and then allocate to suitable team members 3.3 Establish performance requirements and evaluation criteria for the team and team members , agreed upon and recorded 3.4 Monitor and evaluate progress of team members to ensure work is progressing to expectations
4 Develop contingency plans	4.1 Formulate and implement contingency plans after an assessment of possible deviations from the norm
5 Conduct post-event evaluations	5.1 Assess delivery of event to determine whether the original needs were met effectively and efficiently 5.2 Prepare reports and make recommendations are made

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Details	[all categories] • dates • venue • type of activity • format • entertainment • catering • travel arrangements • accommodation • marketing and promotion • specialised equipment • single event • multiple event • sanctions • first aid • individual participant needs
Deviations from the norm	[all categories] • weather conditions • duty of care • legal considerations • catering • numbers fluctuating from expected • staffing factors • disputes ○ internal ○ external • other factors outside the control of the organisation
Gaps in delivery of service	[all relevant categories] • location • venue • type of activity • categories • dates
Reports	[all categories] • financial acquittals • post event evaluation and recommendations

Resources	[all categories] • personnel • finances • facilities • sponsorship
Special events	[one category] • carnivals/sports tournament/matches/races ○ swimming ○ marathon ○ fun runs ○ triathlons • single event • multiple event • knockout contests • round robins
Team members	[four categories] • paid employees • volunteers • contractors • interested parties • organisation members • media outlets

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of coordinating special events in the work environment • Assessment of performance should be over a period of time covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ identify gaps in the market for the delivery of special events ○ plan, budget and set timelines for a special event that is in line with goals and objectives of the organisation ○ coordinate the activities of team members during a special event ○ contingency plans are developed to be implemented in the event of a deviation from set operating procedures during the special event ○ prepare reports detailing an assessment of the special event ○ finalise financial accounts and prepare financial records for inspection by the auditor
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT011A Environmental issues and events ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Organisation's policy and procedures for the management of meetings/events ○ Organisation's policy and procedures for contracting suppliers ○ Organisation's procedures for coordinating a function or event ○ Occupational Health and Safety (OH&S) and risk management procedures for coordination of functions and events ○ Knowledge of typical technical requirements for functions

	○ Knowledge of typical layouts for functions ○ Development of promotional displays and material ○ Public relations knowledge for servicing of clients ○ Organisation's procedures for processing of accounts to be paid ○ Industrial Relations Act ○ Insurance laws ○ Local government by-laws • Required skills ○ Organisational skills in terms of event planning ○ Use of technology and equipment for coordination of events ○ Referral skills to identify to whom to refer difficulties with the venue or equipment ○ Research skills to seek information on the current market for events ○ Problem solving skills to identify the best course of action if equipment does not work during an event and/or insufficient staff or food arrives ○ Literacy skills to clarify information on current market gaps for special events
Resource implications	• Physical resources - assessment of this competency requires access to ○ market research on special events • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with various sectors within the market, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to conducting market research and identifying possible gaps in the delivery of special events
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	3	2	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Analysing information to determine trends and 'gaps' in the market • Communicating ideas and information - Writing reports and making recommendations on findings • Planning and organising activities - Making contingency plans after market research • Working with teams and others - Working with other organisational members • Using mathematical ideas and techniques - Not applicable • Solving problems - Dealing with staff problems at an event • Using technology - Using a computer for report writing Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT004B	PLAN AND MANAGE CONFERENCES ON BEHALF OF MANAGEMENT TO ACHIEVE IDENTIFIED GOALS
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers managing a conference, including the planning stages, preparation of materials and participants, promotion, coordination on the day(s), taking follow-up action, all within timelines.

ELEMENT	PERFORMANCE CRITERIA
1 Plan conference	1.1 Clarify purpose of conference with management 1.2 Plan budget and make projections in conjunction with management 1.3 Identify possible sponsorship opportunities 1.4 Develop conference program in line with stated purpose 1.5 Identify relevant participants 1.6 Arrange time and venue of conference
2 Organise conference	2.1 Invite participants 2.2 Identify and note participants' special needs 2.3 Prepare program details 2.4 Prepare conference papers from relevant sources 2.5 Dispatch conference papers and details on accommodation and registration to participants within designated timelines 2.6 Invite and brief speakers 2.7 Confirm venues and times 2.8 Estimate costs and confirm to budget 2.9 Establish registration procedures 2.10 Confirm transport and accommodation requirements 2.11 Cater for participants' special needs
3 Promote conference	3.1 Prepare sponsorship proposals and present to potential sponsors 3.2 Prepare publicity material and dispatch
4 Coordinate conference proceedings	4.1 Register participants 4.2 Manage access for participants , support personnel, emergency services, media 4.3 Communicate changes to the published agenda to participants 4.4 Make contingency arrangements to ensure the smooth running of conference 4.5 Greet speakers and host throughout conference 4.6 Manage organisation of administration throughout the conference 4.7 Maintain the venue in good repair and cleanliness 4.8 Account for equipment and return clean and in working order
5 Follow up conference proceedings	5.1 Follow up outcomes of the conference 5.2 Prepare papers from conference for publication 5.3 Debrief speakers/participants 5.4 Analyse evaluations of the conference and note 5.5 Thank speakers for participating

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Brief	[all categories] • date, venue of conference • equipment available • theme of conference • nature of audience • topic of speech/session to be delivered • other speakers
Communicate	[two categories] • note in conference kit • announcement • notice displayed
Conference	[two categories] • nature • size • small • large • simple • complex • event program
Contingency arrangements	[three categories] • contact details of all caterers, equipment hirers • stand in speakers, presenters • additional administration staff available • indoor venue pre-arranged in case of wet wether • stand in entertainers • additional kits available • timetable modified to accommodate late arrivals and entries
Designated timelines	[one category] • organisation's procedures for the dispatch of conference documents to participants in time for them to read and prepare for the conference
Note	[one category] • for incorporation into organisation's aims and objectives

	• for incorporation into relevant policy and procedures • for reference in developing future conference programs • for improvements in the organisation/administration of future conferences
Participants	[one category] • promoters • sponsors • prospective sponsors • clients • prospective clients • staff • speakers • spectators
Participants' special needs	[one category] • disability access and/or equipment • interpreters • additional/special equipment • dietary requirements
Program details	[all categories] • venue address • venue access and parking details • date and times • program and speakers • accommodation details • payment details
Purpose	[one category] • promotion • income generation • product launch • information on organisation • objective of the organisation • staff training
Register	[all categories] • attendance/absence recorded • payment confirmed • conference kit distributed • name tag distributed • special needs attended to
Relevant sources	[one category] • conference speakers

	• research papers • organisation's aims and objectives • venue assets and limitations

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the planning and management of conferences in the work environment • Assessment of performance should be over a period of time covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ make conference arrangements according to plan ○ complete administrative procedures accurately and within designated organisation timelines ○ promote the conference effectively ○ prepare contingency plans ○ ensure the conference runs smoothly ○ ensure necessary follow-up action is taken
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT011A Environmental issues and events ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Organisation's policy and procedures for the management of conferences ○ Organisation's policy and procedures for contracting suppliers ○ Occupational Health and Safety (OH&S) and risk management procedures for coordination of conferences ○ Knowledge of typical technical requirements for conferences ○ Knowledge of typical layouts for conferences ○ Development of promotional displays and material

	○ Public relations knowledge for servicing of clients/guests/delegate/speakers ○ Organisation's procedures for processing of accounts to be paid ○ Industrial Relations Act ○ Insurance laws ○ Local government by-laws • Required skills ○ Organisational skills in terms of conference planning ○ Use of technology and equipment for coordination of conferences ○ Referral skills to identify to whom to refer difficulties with the venue or equipment ○ Research skills to seek information on appropriate speakers for conferences ○ Problem solving skills to identify the best course of action if equipment does not work during a conference and/or insufficient staff or food arrives ○ Literacy skills to clarify information on organisation's identified goals for the conference
Resource implications	• Physical resources - assessment of this competency requires access to ○ a real conference planning process • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with different client groups and their requirements, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to managing a conference
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	3	2	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information on client's requirements • Communicating ideas and information - Liaising with client, staff and suppliers • Planning and organising activities - Planning details of meeting with client • Working with teams and others - Working with staff to deliver customer requirements • Using mathematical ideas and techniques - Not applicable • Solving problems - Dealing with late client requests • Using technology - Using email to communicate with client Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT005B	MANAGE SPECIAL EVENTS
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to initiate research on the need for an event, to assess the viability of the event and to oversee the development of planning process for the event.

ELEMENT	PERFORMANCE CRITERIA
1 Recognise the need for special events	1.1 Initiate the <i>identification</i> of the need for a <i>special event</i> 1.2 Assess <i>viability</i> of the event concept
2 Approve all aspects of special events	2.1 Scrutinise all <i>details</i> of special event planning and inspect <i>details</i> 2.2 Ensure all <i>details</i> are in accordance with the policies of the organisation 2.3 Clarify questionable areas and provide advice/direction to the coordinator of the event 2.4 Clarify <i>details</i> and grant permission to continue operations 2.5 Receive, assess and distribute <i>reports</i> and evaluate 2.6 Assess recommendations and initiate where appropriate

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Details	[all categories] • dates • venue • type of activity • format • entertainment • catering • travel • accommodation • program • speakers/presenters/judges/officials
Identification	[one category] • market research • survey • client feedback
Reports	[two categories] • financial acquittals • procedures and systems report • achievement of objectives • management report
Special event	[two categories] • carnival/tournaments/matches/races ○ swimming ○ marathon ○ fun runs ○ triathlons • single event • multiple event • knockout contests • round robins
Viability	[all categories] • financial • number of anticipated participants • promotional opportunities

	• organisation's aims and objectives

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the management of special events in the work environment • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ assess the viability of an event ○ review the planning and management processes for a special event, clarify uncertainties and give approval for the event to go ahead ○ initiate recommendations that have come out of the staging of the event that are appropriate to the organisation
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program
Required knowledge and skills	• Required knowledge ○ Comprehensive knowledge of typical event management systems ○ Issues and problems relating to overall event management ○ Organisation's policy and procedures for the management of events ○ Organisation's policy and procedures for contracting suppliers ○ Occupational Health and Safety and risk management procedures for coordination of events ○ Knowledge of typical technical requirements for events ○ Knowledge of typical layouts for events ○ Public relations knowledge for servicing of clients/guests/delegate/speakers ○ Organisation's procedures for processing of accounts to be paid ○ Comprehensive knowledge of conducting market research, survey and client questionnaires • Required skills ○ Organisational skills in terms of event planning ○ Analysis skills to assess market research, surveys and client questionnaires ○ Use of technology and equipment for coordination of events in order to assess systems ○ Referral skills to identify to whom to refer questionable areas of the event program ○ Research skills to seek information on the viability of an event ○ Problem solving skills in order to advise coordinator of the event of

	the most appropriate course of action ○ Literacy skills to clarify information on procedures and systems for the management of events
Resource implications	• Physical resources - assessment of this competency requires access to ○ sample event concepts • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as the diverse range of special requirements that may be encountered, this unit of competency must be assessed over a number of events in order to ensure consistency of performance over the Range Statements and contexts applicable to managing special events
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	3	3	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information on the requirements of the special event • Communicating ideas and information - Liaising with event coordinator regarding special requirements • Planning and organising activities - Planning event for clients • Working with teams and others - Working with other organisational members • Using mathematical ideas and techniques - Calculating the financial viability of the event • Solving problems - Dealing with special requests from clients • Using technology - Using the internet and email for communicating Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT006B	PLAN, IMPLEMENT AND EVALUATE AN EVENT OR PROGRAM
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the skills and knowledge required to establish the feasibility of an event or program; design a program; develop organisational structures and processes; identify necessary resources; coordinate the implementation of the program; monitor, evaluate and report on the program.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare a bid to hold an event or program	1.1 Identify and document procedures involved in the bidding process 1.2 Prepare and document a bid to hold an event
2 Plan an event or program	2.1 Clarify purpose and objectives of the event or program with management and meet the needs of participants and the organisation 2.2 Identify resource requirements 2.3 Plan budget and make projections in conjunction with management 2.4 Identify relevant participants 2.5 Arrange time and venue of the event program in the context of other planned and competing events or programs
3 Develop and implement organisational structures and processes	3.1 Identify and document a timeline, methodology and roles and responsibilities 3.2 Develop systems and procedures to meet the requirements of the event or program 3.3 Develop contingency plans to ensure the smooth running of the event or program 3.4 Ensure all legal, statutory and organisation's requirements are met
4 Coordinate event or program	4.1 Brief staff on systems and procedures 4.2 Check all aspects of the set up in accordance with the pre-arranged agreement
5 Monitor event or program	5.1 Identify difficulties as they arise, assess for their impact on the event or program and modify plans or contingency plans implemented and modify activities if necessary 5.2 Undertake liaison with client throughout the event or program to ensure it is progressing to their satisfaction
6 Evaluate event or program	6.1 Develop evaluation criteria and document for each identified objective 6.2 Assess delivery of the event or program to determine if purpose and objectives were met effectively and efficiently 6.3 Obtain feedback from participants, clients and staff 6.4 Document information for use in future event or program organisation 6.5 Prepare reports and make recommendations on areas of improvement that have been identified

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Bid	[all categories] • technical • financial • marketing and promotion plans • anticipated venues • expected participants • expected spectators
Client	[one category] • internal manager • sponsor • government agency • funding body
Contingency plans	[all relevant categories] • inclement weather • number of registrations • personnel • equipment • facilities • venues • funding • number of pre-sold tickets • contact details of all caterers, equipment hirers • stand in presenters, master of ceremony
Event or program	[two categories] • simple • complex • local • national • international • festival • sport event • competition • community event • function • conference • holiday program • celebration

	• product/activity launch • workshop • club • drop in
Legal, statutory and organisation's requirements	[all categories relevant to event] • federal, state or local government authority permits • sponsorship obligations • venue and facility requirements • sports drug agency • local and regional authorities • sponsors • media • police • first aid providers • fire and emergency services • Occupational Health and Safety (OH&S) • insurance ○ public liability ○ professional indemnity ○ cancellation • organisation's policy and procedures • international competition rules • international sponsor contracts • international media contracts
Participants	[four categories] • target audience • promoters • sponsors • prospective sponsors • clients • prospective clients • staff • local • national • international
Procedures	[all categories] • timeframe • aims and objectives of the proposed event • person or body to whom to present bid • budget • expected size and complexity
Purpose and objectives	[two categories] • promotion • income generation • product/activity launch

	• information on organisation • objective of organisation • needs of participants
Reports	[all categories] • financial acquittals • post event evaluation and recommendations • systems and procedural reports and recommendations
Resource requirements	[all categories relevant to event] • human • technical • financial • venues • facilities • equipment • transport • accommodation • sponsorship • international competition rules and structures • doping requirements • media
Roles and responsibilities	[all categories] • finance • event or program management • marketing • support personnel • safety • equipment • venue • sponsorship • media • merchandising
Set up	[all categories relevant to event] • availability of all materials and equipment • room set ups • staging • technical equipment • display and signage • food and beverage arrangements • registration areas • security • first aid • media • merchandising • drug testing procedures • social activities

	• seating ○ participants and support personnel ○ spectators
Systems and procedures	[all categories] • timeframe and methodology • contingency strategy • database of rostered staff • registration system • database of participants • database of caterers, equipment hirers, suppliers • database of program speakers, presenters • event draw • newsletters • media access • participants venues and facilities • recording and processing of results • communication with participants

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of the factors influencing the planning and implementation of an event or program in the work environment - Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements - In particular, assessment must confirm the ability to - prepare a bid to hold an event which includes all key components and requirements that make up a successful bid - identify the resource requirements necessary to achieve the purpose and objectives agreed upon for an event or program - develop systems and procedures that will ensure the event or program runs smoothly - ensure all aspects of the event or program coordination have been checked and are correct - monitor the program or event to ensure the stated objectives are met and any unforeseen difficulties are handled efficiently and with minimum disruption to the event or program - evaluate the event or program against stated purpose and objectives and make recommendations for future event or program organisation - prepare all necessary reports including financial and management
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - SRXEVT003B Coordinate events - SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals - THTPPD08B Plan and develop meeting, event proposals and bids - THTPPD09B Develop conference programs - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - SRXEVT005B Manage special events - SRXEVT007B Manage spectators at an event or program
Required knowledge and skills	- Required knowledge - Comprehensive knowledge of typical event management systems - Issues and problems relating to overall event management - Organisation's policy and procedures for the management of events - Organisation's policy and procedures for contracting suppliers - Occupational Health and Safety (OH&S) and risk management procedures for coordination of events - Knowledge of typical technical requirements for events - Knowledge of typical layouts for events - Public relations knowledge for servicing of clients/guests/delegate/speakers/participants - Organisation's procedures for processing of accounts to be paid - Required skills - Organisational skills in terms of event planning

	○ Analysis skills to assess market research, surveys and client questionnaires ○ Use of technology and equipment for coordination of events in order to assess systems ○ Referral skills to clarify legal or technical difficulties with the planning of the event ○ Research skills to seek information on the viability of an event ○ Problem solving skills in order to give advice to staff in the event of an unforeseen difficulty during the staging of the event ○ Literacy skills to clarify information on procedures and systems for the management of events
Resource implications	• Physical resources - assessment of this competency requires access to ○ a planned event or program • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as the uniqueness of each event, this unit of competency must be assessed over a number of events in order to ensure consistency of performance over the Range Statements and contexts applicable to planning, implementing and evaluating an event or program
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding clients requirements • Communicating ideas and information - Communicating with media regarding the event • Planning and organising activities - Planning budget for event • Working with teams and others - Working with a range of contractors, clients and staff • Using mathematical ideas and techniques - Calculating staffing requirements • Solving problems - Dealing with special demands from a client • Using technology - Using a computer and the internet to access information and communicate with clients Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT007B	MANAGE SPECTATORS AT AN EVENT OR PROGRAM
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to develop and implement a risk management plan and a plan for the admittance, seating and dispersal of crowds of spectators; and develop procedures for managing spectators at an event in an emergency.

ELEMENT	PERFORMANCE CRITERIA
1 Develop and implement a plan to minimise the risks associated with crowds of spectators at a complex event or program	1.1 Identify legal constraints and requirements in relation to managing spectators at an event or program 1.2 Identify risks associated with crowds of spectators and assess for their impact and planning 1.3 Identify risks associated with the venue and assess for their impact on planning 1.4 Identify the capacities of the venue and facilities and document implications on planning 1.5 Set and document a maximum limit on the number of spectators to be admitted in accordance with identified risks and venue capacities 1.6 Inspect spectator facilities to ensure they comply with legal requirements 1.7 Undertake any necessary work to ensure compliance 1.8 Develop and implement a plan that minimises the identified risks associated with the venue and crowds of spectators, and complies with legal constraints and requirements
2 Develop and implement a plan for the management of crowds of spectators at a complex program	2.1 Estimate the expected number of spectators based on past attendances at events or programs of the same or similar nature 2.2 Identify and document the number and positions of viewing sites, exits, and aisles 2.3 Identify and document the number of people required for managing spectators 2.4 Restrict access to event or program participant and performance areas 2.5 Develop and implement a plan for the management of the estimated number of spectators 2.6 Ensure the plan complies with the risk management plan for the program
3 Develop procedures for managing spectators in an emergency at a complex event or program	3.1 Maintain safety equipment according to manufacturers' specifications 3.2 Inspect safety equipment regularly to ensure it complies with legal requirements 3.3 Identify and document the safety needs of special populations in an emergency 3.4 Develop and document procedures for managing spectators in an emergency 3.5 Implement practice drills with event or program personnel and record in a log

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Emergency	[four categories] • fire • earthquake • bombing • chemical leak or spill • riot • illegal entry • alcohol • drugs • medical emergency • equipment failure • stage failure or collapse
Event or program	[two categories] • festivals • sport events • competitions • community events • functions • conferences • holiday programs • celebrations • arts events • performances • complex event or program ○ long lead time – more than three months ○ large organising team or group – more than three people ○ several events within the overall event of program ○ participant and/or audience origin varied ○ complex organisational structure
Facilities	[two categories] • stadiums • arenas • sports grounds • grandstands • gymnasiums • halls • theatres • kitchens • restaurants • bathrooms/dressing rooms

	swimming pools
Legal requirements	[all categories] - fire egress - Occupational Health and Safety (OH&S) - Risk Management - First aid - insurances - public liability - professional indemnity - resource management
Management	[all relevant categories] - ticketing - admission - ushering - seating - crowd control - security - first aid - catering - toilet facilities
Procedures	[all categories] - crowd control - evacuation - special populations - first aid
Risks	[all categories] - includes but not limited to - overcrowding - crowd stress - mob behaviour - protection of participants - protection of performers - traffic flows - areas of congestion - emergency access of services
Venues	[two categories] - outdoor environments - open spaces - aquatic environments - parks - streets - indoor facilities

	• gymnasiums

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the development of a risk management plan for the management of spectators at an event or program in the work environment • Assessment of performance should be over a number of events/programs covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ ensure the risk management plan identifies all the risks associated with the event or program, puts steps in place to minimise the identified risks and complies with all legal and organisational requirements ○ ensure enough personnel are on hand to effectively manage the expected number of spectators ○ ensure personnel, procedures and equipment are in place to effectively deal with an emergency
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXRIK002A Conduct a risk audit and develop the organisation's risk management policy ○ SRXEMR002A Coordinate emergency response ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT005B Manage special events ○ SRXEVT007B Manage spectators at an event or program
Required knowledge and skills	• Required knowledge ○ Comprehensive knowledge of typical event/program management systems ○ Issues and problems relating to overall event/program management ○ Organisation's policy and procedures for the management of events/programs ○ Occupational Health and Safety (OH&S) and risk management procedures for coordination of events/programs ○ Knowledge of typical technical requirements for events/programs ○ Public relations knowledge for servicing of clients/guests/delegate/speakers ○ Occupational Health and Safety (OH&S) legislation ○ Relevant insurances for the staging of an event/program • Required skills ○ Organisational skills in terms of event planning ○ Analysis skills to assess risks associated with the staging of events/programs ○ Use of technology and equipment for coordination of events/programs in order to assess systems ○ Referral skills to identify to whom to refer questionable safety aspects of the staging of the event/program

	○ Research skills to seek information on the legal requirements associated with the event/program ○ Problem solving skills in order to advise coordinator of the event of the most appropriate course of action in an emergency ○ Literacy skills to clarify information on procedures and systems for the management of events ○ Organisational skills in terms of events/programs planning ○ Use of technology and equipment for coordination of events/programs
Resource implications	• Physical resources - assessment of this competency requires access to ○ a real event or program in order to develop and implement a risk management plan • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with different venues with differing layouts, this unit of competency must be assessed over a number of events/programs in order to ensure consistency of performance over the Range Statements and contexts applicable to managing spectators at an event
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation event/program with a range of real clients. For valid and reliable assessment the sport or recreation event/program should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information on the venue and the event • Communicating ideas and information - Briefing staff members on the emergencies procedures to be adopted • Planning and organising activities - Planning evacuation routes in the event of an emergency • Working with teams and others - Working with venue staff to develop policies • Using mathematical ideas and techniques - Estimating anticipated numbers of spectators at an event • Solving problems - Dealing with a first aid emergency at a venue • Using technology - Using a fire extinguisher in the event of fire at the venue Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT008A	PROCESS AND MONITOR EVENT REGISTRATIONS
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to process, monitor and finalise registration for meetings or events. These skills are usually required by office-based staff involved in the event organisation process.

ELEMENT	PERFORMANCE CRITERIA
1 Process registrations	1.1 Set up a database according to the requirements for a specific meeting/event 1.2 Receive and process registrations in accordance with agreed procedures and timelines 1.3 Provide correct answers to guests/delegate questions relating to the meeting/event 1.4 Action any accommodation, travel and touring requirements in accordance with agreed procedures 1.5 Reports special delegate requirements to suppliers 1.6 Issue confirmations in accordance with agreed procedures and within designated timelines 1.7 Prepare and issue documents and other materials to registered delegates/guests in accordance with requirements of the specific meeting/event 1.8 Update the financial status of the customer's records accurately and in accordance with enterprise procedures
2 Monitor registration	2.1 Monitor registration numbers with complete accuracy and provide reports on a regular basis to appropriate colleagues/customers/suppliers 2.2 Take any required action to boost numbers in accordance with instructions
3 Finalise registrations and produce materials	3.1 Finalise registration details within designated timelines 3.2 Produce and check name tags and other individual delegate documentation in accordance with agreed style for a specific meeting/event 3.3 Produce and check for accuracy guest/delegate reports and/or lists to include all required information

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Documents	[all relevant categories] • issued to delegates and guests ○ invoices ○ credit notes ○ receipts ○ service vouchers ○ confirmation letters ○ information packs ○ sponsor advertisements
Guest/delegate reports and/or lists	[all relevant categories] • payment status • details of pre booked sessions • travel and touring arrangements • accommodation details • special requests • further action required at venue
Registration	[one category] • may be processed and monitored ○ by computer ○ manually
Updated the financial status of the customer's records	[two categories] • receiving, processing and recording payments • generating and issuing invoices and credit notes for changed arrangements • checking that the customer has fully paid

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the factors influencing the processing and monitoring of registrations at a sport or recreation event in the work environment • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ accurately process registrations and produce registration materials within enterprise acceptable timeframes
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT011A Environmental issues and events ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ General knowledge of the meetings sector of the tourism industry ○ Meeting/event registration systems and procedures ○ Issues that arise in the administration of meeting/event registrations ○ A full range of meetings or events registration documentation ○ General knowledge of customers for different types of meetings/events • Required skills ○ Office skills to competently operate industry-current computers, printers and database programs

Resource implications	- Physical resources - assessment of this competency requires access to - a meeting or event with commonly used registration facilities and equipment - Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit but preferably be competent in the unit at the level above - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Due to issues such as dealing with a variety of venues and client groups, this unit of competency must be assessed over a number of events in order to ensure consistency of performance over the Range Statements and contexts applicable to processing and monitoring event registrations
Context of performance	- This unit of competency must be assessed in the context of a sport or recreation event with a range of real clients. For valid and reliable assessment the sport or recreation event should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Checking registration requests and processing registration in line with the guest or delegate's request • Communicating ideas and information - Providing information on the venue facilities and meeting or event activities to the guests and delegates • Planning and organising activities - Determining the number of registration to be processed and prioritising the order of confirmations to be provided to various customers • Working with teams and others - Providing relevant reports to other personnel and suppliers to ensure the required information is available to them • Using mathematical ideas and techniques - Checking and recording numbers of registrations for particular meeting or event sessions, calculating appropriate costs and issuing invoices • Solving problems - Identifying and actioning any discrepancies with registration • Using technology - Using a calculator to calculate numbers of registrations and payment details, using a computer database to control the registrations Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT009A	DEVELOP A TRANSPORT STRATEGY FOR AN EVENT
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the skills and knowledge required to identify the transport needs for an event and develop an appropriate transport strategy.

ELEMENT	PERFORMANCE CRITERIA
1 Identify transport needs	1.1 Identify the needs of competitors, officials, VIPs, spectators, volunteers and media travelling to and from the event and during the event 1.2 Identify the needs of people with a disability and special needs travelling to and from the event and during the event 1.3 Considering the size of the event , the nature of the event , the number of facilities and the number of participants , identify the transport needs with regard to participants sporting equipment, road closures for events, eg, marathon, local government issues and staff requirements
2 Develop strategies to meet differing transport needs	2.1 Identify transport resources required (public transport, contractors, hire vehicles, private vehicles pooling, transport sponsor pooling) 2.2 Identify the legal, safety and insurance issues as they relate to event transport 2.3 Identify budget constraints as they relate to event transport
3 Develop a transport plan	3.1 Liaise with competition officials, accommodation providers , team officials and staff 3.2 Identify parking, pick-up and drop-off points considering times when transport is required 3.3 Outline refuelling procedures to drivers 3.4 Identify access and parking locality for emergency vehicles and suppliers 3.5 Identify critical tasks and allocate timelines 3.6 Communicate the transport plan to users within the logistics plan
4 Develop risk management plan	4.1 Develop critical incident procedures within the logistics plan 4.2 Deal with contingencies as and when they arise 4.3 Ensure appropriate security for vehicles and keys when not in use 4.4 Monitor weather conditions and ensure appropriate contingency plans are developed
5 Develop rosters, timetables and allocate vehicles	5.1 Ensure efficient allocation of transport resources in terms of availability and variety 5.2 Monitor usage of vehicles 5.3 Monitor weather conditions and develop appropriate contingency plans 5.4 Obtain appropriate maps of all event locations and make them readily available to drivers and navigators
6 Retrieve vehicles	6.1 Retrieve, check and return vehicles to relevant sources 6.2 Terminate contract ensuring all conditions have been met
7 Evaluate strategies	7.1 Evaluate timetables, budget , resource allocation, usage, effectiveness of risk management plan and customer satisfaction 7.2 Ensure outcomes of evaluation are incorporated into future event

	preparations

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Accommodation providers	[all relevant categories] • type of accommodation ○ five star hotel etc ○ executive apartments ○ motels ○ caravan/camping grounds • geographic location in relation to venues • traffic issues ○ pick-up and drop-off points
Availability and variety of transport resources	[all relevant categories] • public transport system ○ suburban train system ○ bus network ○ ferry ○ light rail/trams ○ rail • private transport system ○ airlines ○ coach services ○ taxis ○ hire cars / minibuses ○ private vehicle ○ charter services ○ limousines ○ dedicated disabled taxis, buses etc ○ horse transports
Budget	[all relevant categories] • cost • users pays • collection of fares • free • free but limited access • discounts, ie, pensioner, pass • reservations • day/event pass
Locality	[all relevant categories] • major metro • regional centre

	• country areas • restricted access area • remote • road surface/terrain • distance between venues • distance to other facilities • distance between accommodation providers and venues • traffic issues ○ peak periods ○ regulations
Logistics plan	[all relevant categories] • contact relevant authorities for information and permission • available transport and timetables • back-up transport system • adequacy of informed taxi service • special conditions for consideration • adequate provision for buses • staff of trained personnel • availability of emergency service • arrival of customers - dump or trickle • adequate provision for disabled people
Nature of the event	[all relevant categories] • juniors • mass participation • elite • masters • disabled • teams • individuals • length of play • time of competition training • equestrian
Number of facilities	[all relevant categories] • single sport / single facility • single sport / multiple facility • single sport / instadia and exstadia • multiple sport / single multi-purpose facility • multiple sport / multiple facilities • public purpose facilities, eg, roads, lakes, bushland
Number of participants	[all relevant categories] • athletes • officials • volunteers • spectators • VIPs

	• media • non-English speaking
Size of the event	[all relevant categories] number of • participants • sports • officials • spectators • volunteers • media
Staff	[all relevant categories] • drivers • guides • volunteers • marshals • interpreters
Times when transport is required	[all relevant categories] • time of day • time of year ◦ school holidays • pick-up and return • length of time to travel

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to identify the transport needs for an event and develop an appropriate transport strategy • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ prepare a transport plan ○ develop rosters and timetables ○ develop a risk management plan ○ evaluate the strategy ○ evaluate the accuracy of budget
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT011A Environmental issues and events ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Events overall operational plan and objectives ○ Transport alternatives ○ Relevant laws and regulations ○ Budget • Required skills ○ Planning and organisational skills in relation to transport planning and management of transport logistics ○ Use of technology and equipment for coordination of transport services

	○ Referral skills to identify to whom to refer difficulties with the transport to, from or within the event ○ Negotiation skills in relation to transport arrangements ○ Research skills to seek information on the most appropriate means of transport to offer and the promotional materials to use to encourage its use during the time of the event ○ Problem solving skills to identify the best course of action if the transport services are not running as planned ○ Literacy skills to clarify information on the identified transport goals for the event
Resource implications	• Physical resources - assessment of this competency requires access ○ to a real or simulated work environment with a variety of transport management systems and strategies • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	3	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collect information to identify the transport needs and strategies required in the transport plan • Communicating ideas and information - Communicate with competition officials, accommodation providers, team officials and staff to develop and implement the transport strategy • Planning and organising activities - Identify transport needs and develop strategies for a transport plan • Working with teams and others - Liaise with competition officials, accommodation providers, team officials and staff to develop and implement the transport strategy • Using mathematical ideas and techniques - Evaluate the budget for transport strategy • Solving problems - Deal with contingencies as and when they arrive • Using technology - Use technology as appropriate in developing and coordinating the transport plan Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT010A	MANAGE AN EVENT ACROSS A NUMBER OF FACILITIES
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge required to develop strategies to manage an event across a number of facilities.

ELEMENT	PERFORMANCE CRITERIA
1 Determine the nature of the usage of all facilities	1.1 Identify the most appropriate facility for each specific element of the event 1.2 Develop a facilities management plan for each facility and each event to be conducted at that facility appropriate to the number of sports and the number of participants
2 Develop a risk management strategy	2.1 Develop risk management strategies relevant to the number of venues , the nature of the venues , the number of events and the nature of events
3 Develop an operational plan to meet the needs of each facility	3.1 Ensure all necessary equipment and personnel are available when required 3.2 Considering geographical factors and transport needs , ensure the transport plan meets the needs of all identified users 3.3 Ensure each venue manager is aware of event requirements
4 Develop a communication strategy for efficient communication between facilities	4.1 Develop a communication procedures manual 4.2 Identify the most appropriate form of communication between facilities, utilising relevant technology 4.3 Develop a results communication strategy between facilities
5 Develop strategies to ensure uniformity of quality operation across all venues	5.1 Considering environmental factors , develop of set of guidelines and procedures to ensure uniform quality of presentation and performance at all venues

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Environmental factors	[all relevant categories] may include • differing weather conditions • waste management • environmentally sensitive areas, eg, forests and national parks
Event requirements	[all relevant categories] may include • contingencies • budget • timing • resources • sponsor signage • media access • VIP areas
Geographical factors	[all relevant categories] may include • distance between venues • travel time between venues • access • traffic issues • access to public transport • communication issues
Nature of events	[all relevant categories] may include • single sport / number of venues • multi event sport, eg, triathlon • multi sport event, eg, Olympic Games
Nature of venues	[all relevant categories] may include

	• single sport • single sport / number of venues • multi-purpose venues • purpose designed venues • indoor / outdoor • exstadia • public space • isolated / remote
Number of events	[all relevant categories] may include • at each venue • at one time at different venues • in the whole event • on each day/night
Number of participants	[all relevant categories] may include • the event • at each venue • each sport • competing at the same time • to be transported
Number of sports	[one category] may include • less than ten • ten to twenty • twenty to fifty • fifty plus
Number of venues	[one category] may include • less than ten • ten to twenty • twenty to fifty • fifty plus
Transport needs	[all relevant categories] may include • participants to and from venues • participants between venues

	• officials/volunteers to and from venues • officials/volunteers between venues • equipment to and from venues • equipment between venues • spectators to and from venues • spectators between venues • media to and from venues • media between venues

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to develop strategies to manage an event across a number of facilities • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ develop event objectives ○ develop a comprehensive event program using principles of event management ○ plan, budget and set timelines for the event in line with overall goals and objectives ○ coordinate the activities at each facility during the event ○ contingency plans are developed to be implemented in the case of a deviation from the set operating procedures during the event ○ prepare reports detailing an assessment of the facilities for the event ○ finalise accounts and records
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT011A Environmental issues and events ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Events policy and procedures for the management of the various facilities ○ Events policy and procedures for contacting suppliers

	○ Events procedures for coordinating facility functions ○ Occupational Health and Safety and risk management procedures for coordination of events ○ Knowledge of typical technical requirements for functions ○ Knowledge of logistics for events ○ Development of promotional materials ○ Events procedures for processing of accounts ○ Industrial Relations Act ○ Insurance laws ○ Local government by-laws ● Required skills ○ Organisational skills in terms of planning a multi-facility event ○ Use of technology and equipment for coordination of events ○ Referral skills to identify to whom to refer difficulties with a venue or equipment ○ Research skills to seek information on the current market for multi-facility events ○ Problem solving skills to identify the best course of action if something does go wrong ○ Literacy skills to clarify information on current market gaps for these special events
Resource implications	● Physical resources - assessment of this competency requires access to ○ a real event across a number of facilities in order to develop and implement a management plan for such an event ● Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	● Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	● This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace ● This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes ● Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	3	2	2	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Identify and collect information on the facilities and the event • Communicating ideas and information - Develop a communication strategy and communicate with venue managers • Planning and organising activities - Develop strategies to manage the event • Working with teams and others - Liaise with venue managers regarding multiple sites and facilities • Using mathematical ideas and techniques - Calculate event requirements including budget and resources • Solving problems - Develop contingencies as and when they are required • Using technology - Use technology to communicate between facilities Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT011A	ENVIRONMENTAL ISSUES AND EVENTS
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the skills and knowledge that are required to identify environmental issues related to events and to develop and implement an environmental plan.

ELEMENT	PERFORMANCE CRITERIA
1 Identify event requirements	1.1 Liaise with the appropriate authorities to identify rules, regulations and processes 1.2 Liaise with the community to identify and address issues including cultural implications 1.3 Identify type of event to suit the surrounding terrain 1.4 Undertake a risk analysis process to identify environmental issues
2 Prepare and submit event plans to appropriate authority (develop application)	2.1 Ensure that the plan addresses issues identified in the risk analysis and includes process to close the event 2.2 Submit the plan/application to the authorities 2.3 Amend plan as required by the authorities 2.4 Identify resource requirements (human and physical) 2.5 Reinforce environmental plan through event promotion
3 Train staff/volunteers and contractors	3.1 Inform staff/volunteers and contractors of environmental plan and resources for the event 3.2 Ensure staff/volunteers promote environmental information to event participants and spectators 3.3 Ensure staff/volunteers and contractors contribute to overall environmental management of the event
4 Monitor compliance with rules/regulations/permission	4.1 Engage commitment by all to good environmental practise at the event 4.2 Monitor staff, contractors, event participants and spectators during event to ensure compliance with environmental plan and regulations 4.3 Take remedial action where required throughout the event
5 Close down event	5.1 Close down food and beverage services 5.2 Shut down noise/visuals 5.3 Cease transport services 5.4 Finish waste management 5.5 Clean up
6 Report and evaluate the event	6.1 Evaluate the environmental plan 6.2 Report on compliance with the environmental plan

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Appropriate authorities	[all relevant categories] may include • local government/council • state government • residents • police • emergency services • rangers • National Parks and Wildlife Service • waste authorities • recycling authorities • foreshore authorities • lease holders
Community	[all relevant categories] may include • geography • race • religion
Cultural implications	[all relevant categories] may include • Aboriginal and Torres Strait Islander • Non-English speaking background
Environmental issues	[all relevant categories] may include • waste • recycling • traffic and transport ○ transport to and from event ○ parking ○ traffic control ○ liaison with local private or public transport companies ▪ bus

	▪ train
Event promotion	[all relevant categories] may include • ticketing • signage • advertisements • announcements
Noise	[all relevant categories] may include • music • crowd • firecrackers • transport
Resource requirements	[all relevant categories] may include • staff • contractors • site • size • packaging • signage • tickets • promotional material • communication • location and removal of bins • toilets • control of soil erosion
Terrain	[all relevant categories] may include • waterways • beach • park • roadway • indoor
Type of event	[all relevant categories] may include • size

	• duration • number of participants • time of the day • time of the year • children and adults • private/public • location • event equipment
Visuals	[all relevant categories] may include • light • firecrackers
Waste management	[all relevant categories] may include • solid waste ○ aluminium ○ glass ○ paper ○ signage ○ plastic ○ human ○ beverage • water ○ disposal ○ conservation • recycling

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the environmental issues related to an event and the ability to develop and implement an environmental plan • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ prepare an operational plan of the event ○ develop an environmental plan ○ develop a risk management plan ○ evaluate the strategy ○ evaluate accuracy of budget
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT012A Liaise with state/local government agencies ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Events overall operational plan ○ Environmental impacts ○ Waste management and reduction practices ○ Relevant standards, regulations, policies and legislation ○ Appropriate authorities and organisations ○ Budget • Required skills ○ Communication skills to liaise and consult with relevant authorities

	○ Program planning, implementation and review ○ Use of technology and equipment for coordination of the environmental plan ○ Research skills to seek information on the most relevant legislation, industry standards, and Council and community requirements
Resource implications	• Physical resources - assessment of this competency requires access to ○ a real or simulated work environment with a variety of environmental management systems and strategies • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	-	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collect, analyse and organise information to develop environmental plan • Communicating ideas and information - Communicate information about the environmental plan with appropriate authorities, staff, volunteers, contractors and event participants • Planning and organising activities - Identify event requirements and utilise to develop and implement an appropriate environmental plan • Working with teams and others - Liaise with appropriate authorities, staff, volunteers, contractors and event participants • Using mathematical ideas and techniques - Not applicable • Solving problems - Amend environmental plan if required and take remedial action during the event as appropriate • Using technology - Technology may be used to develop the environmental plan Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXEVT012A	LIAISE WITH STATE/LOCAL GOVERNMENT AGENCIES
EVT	Events

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the skills and knowledge required to liaise and work with appropriate government agencies in relation to an event.

ELEMENT	PERFORMANCE CRITERIA
1 Identify all relevant government authorities across all three levels of government (if appropriate)	1.1 Identify all government authorities across the three levels of government that relate to the event 1.2 Develop a database of government contacts across all relevant agencies and levels of government appropriate to the event
2 Identify all major government regulation requirements relevant to the event	2.1 Identify all major elements of the event and clarify of applicable government regulations
3 Identify important government personnel	3.1 Contact relevant government agencies for each of the events' key portfolio areas in which government could have a role 3.2 Arrange meetings with government officials to discuss the elements of the event within their area of responsibility 3.3 Identify the most relevant government officer/team/section to liaise with on each element of the event
4 Establish liaison strategy for working with government	4.1 Develop a relationship with a key government agency in order for it to become the events major government partner in facilitating communication with other areas of government 4.2 Establish a government/event cooperative committee with identified key personnel 4.3 Negotiate a Memorandum of Understanding or other appropriate formal agreement with appropriate agencies 4.4 Establish direct relationship with key government officials 4.5 Include appropriate government personnel on event committees or sub-committees
5 Identify government objectives related to the event	5.1 Conduct discussions with key government personnel to establish government objectives for the event 5.2 Determine the role that government will perform in funding or underwriting events in order that generalised benefits of government involvement might be obtained 5.3 Develop joint document identifying these objectives 5.4 Incorporate government objectives into events strategic plan where appropriate

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Benefits of government involvement	[all relevant categories] may include • operational profit • benefits for related industry sectors ○ travel ○ accommodation ○ restaurants ○ hirers and suppliers of equipment • destination promotion • increased tourism spending
Government objectives	[all relevant categories] may include • economic • social • political • cultural
Government personnel	[all relevant categories] may include • politicians • heads of department • Chief Executives (local government) • section heads • foreman/leading hand • officers
Levels of government	[all relevant categories] may include • federal • state • local
Portfolio areas	[all relevant categories]

	may include • sport/recreation • facilities • parks/public places • transport • licensing • traffic • waste management • utilities • tourism authorities • information services • police • emergency services • convention/event sections
Relevant government agencies	[all relevant categories] may include • departments (federal/state) • sections • government owned corporations • local teams

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to liaise and work with appropriate government agencies in relation to an event • Assessment of performance should be over a number of events covering the prescribed number of categories from the Range Statements • In particular, assessment must confirm the ability to ○ ensure that the event complies with all legal and organisational requirements ○ review the planning and management processes for an event, clarify uncertainties and seek approval for the event to go ahead ○ liaise with the government and venue management to ensure all arrangements are understood ○ ensure personnel, procedures and equipment are in place to effectively deal with an emergency ○ coordinate all details and resources to meet government regulations, legislation and council requirements
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXEVT002B Organise meeting/event and provide on-site meeting/event management services • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEVT003B Coordinate events ○ SRXEVT004B Plan and manage conferences on behalf of management to achieve identified goals ○ SRXEVT005B Manage special events ○ SRXEVT006B Plan, implement and evaluate an event or program ○ SRXEVT007B Manage spectators at an event or program ○ SRXEVT008A Process and monitor event registrations ○ SRXEVT009A Develop a transport strategy for an event ○ SRXEVT010A Manage an event across a number of facilities ○ SRXEVT011A Environmental issues and events ○ THHGCS05B Organise in-house functions ○ THTFME05A Select event venues and sites ○ THTFME06A Manage event contractors ○ THTFME07A Organise and monitor infrastructure for outdoor events ○ THTFME08A Integrate technology into the event management process ○ THTFME09A Develop and update knowledge of protocol ○ THTPPD08B Plan and develop meeting, event proposals and bids ○ THTPPD09B Develop conference programs ○ THTPPD10B Develop and implement sponsorship plans
Required knowledge and skills	• Required knowledge ○ Comprehensive knowledge of typical government systems and processes ○ Issues and problems requiring government attention ○ Government policies and procedures for the management of

	- events ○ Occupational Health and Safety legislation ○ Relevant insurances for the staging of an event • Required skills ○ Organisational skills in terms of event planning ○ Communication skills appropriate for government liaison ○ Referral skills to identify to whom to refer questions regarding regulatory aspects of the staging of the event ○ Research skills to seek information on the legal requirements associated with the event ○ Liaise with government to ensure arrangements are understood ○ Problem solving skills to ensure the most appropriate course of action is taken with the particular level of government ○ Literacy skills to clarify information on procedures and systems for government approval and support
Resource implications	• Physical resources - assessment of this competency requires access to ○ a real event or program in order to develop and implement a plan with government liaison • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competency in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, participants or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	3	2	2	-	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collect and analyse information on relevant government authorities, regulations and personnel • Communicating ideas and information - Communicate with relevant government agencies • Planning and organising activities - Identify relevant government agencies, regulations and personnel. Develop strategies to liaise with government in relation to the event. • Working with teams and others - Develop a liaison strategy to work with government personnel • Using mathematical ideas and techniques - To determine the role that government may undertake in funding or underwriting events • Solving problems - Not applicable • Using technology - Use technology to communicate and to develop a database of government contacts as appropriate Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THHGCS05B	ORGANISE IN-HOUSE FUNCTIONS
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to organise functions from the perspective of functions co-coordinator operating within a venue. The skills required by independent event organisers are covered in other units.

ELEMENT	PERFORMANCE CRITERIA
1 Co-ordinate function bookings	1.1 Answer enquires for function bookings courteously and correctly 1.2 Accurately identify customer needs and preferences 1.3 Consider the size and style of facilities and explain these to the customers in order to meet their requirements 1.4 Show facilities to customers, if required
2 Establish customer requirements	2.1 Discuss the customer's specific requirements including menus, style and format of occasion, layout of room, technical requirements, timing details including access and break down 2.2 Offer informed and courteous advice to customers to assist them in planning the function 2.3 Consult with colleagues and suppliers to discuss customer requirements and to determine how these can be met 2.4 Agree on function details with the customer and confirm these in writing including deposit, final payment requirements and other booking conditions 2.5 Prepare and issue documents and other materials to the customer in accordance with requirements of the specific function 2.6 Keep accurate records of customer requirements, final agreed booked details and amend as necessary 2.7 update the financial status of the customer's records accurately and in accordance with enterprise procedures
3 Arrange function details	3.1 Supply all details of the function to all appropriate colleagues and external suppliers to ensure effective planning of function elements 3.2 Identify and organise appropriate staffing requirements 3.3 Identify and consider possible effects of special functions and take appropriate action to minimise disruption to other customers 3.4 Identify the need for the service of external suppliers and make bookings in writing 3.5 Organise special stock requirements in a timely fashion 3.6 Prepare function sheets and use the sheet to reconfirm all details of the function with the customer 3.7 Distribute the function sheets to all internal staff involved in the operation of the function, in accordance enterprise procedures 3.8 Prepare and deliver any required pre-function briefings to ensure that all function staff have full and current details of their requirements and to ensure the smooth running of the function 3.9 Issue confirmations in accordance with agreed procedures and within designated timelines
4 Monitor and evaluate functions	4.1 Monitor the set up, and when required, the operation of the function to ensure all agreed customer requirements are met 4.2 Obtain feedback from customers and operational staff and use this information for future function organisation 4.3 Finalise any post function administrative requirements accurately and promptly

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Functions	may include • breakfasts • lunches • dinners • seminars/conferences • cocktail parties • weddings • product launches • meetings • seminars • workshops • special touring events
Documents issued to customers	may include • invoices • credit notes • receipts • service vouchers • information pack
Updating the financial status of the customer's records	may include • receiving, processing and recording payments • generating issuing invoices and credit notes for changed arrangements • checking that the customer has fully paid
Customer records	may be • a computer file • a manual file
Suppliers	may include • internal departments • external organisations
Supplies	may be for • entertainment

	• audio visual equipment • special equipment • floral arrangements • food and beverage • photography services
Pre function briefings	may be delivered • verbally • in writing
The sport and recreation industry	covers • industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of organising in-house functions • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ conduct the entire function organisation process and ensure function services meet the agreed requirements of customers ○ demonstrate accuracy in the presentation of function information and the ability to tailor the services of the establishment to meet customer needs ○ demonstrate knowledge of the types and range of function services that may be required
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THTSOP04B Sell tourism products and services ○ THTSOP05B Prepare quotations ○ THTSOP07B Book and coordinate supplier services
Required knowledge and skills	• Required knowledge ○ Knowledge of typical function requirements including ▪ food and beverage ▪ technical ▪ function layouts ▪ security ▪ entertainments ▪ decorations ○ General knowledge of customer requirements for different types of functions • Required skills ○ Organisational skills in terms of event planning ○ Function co-ordination procedures and systems ○ Use of various order forms, reports, function sheets and briefing papers
Resource implications	• Physical resources - assessment of this competency required access to ○ use of industry-current function documentation and sales kits ○ and demonstration of skills within a suitable venue for the operation of a function ○ presence of typical workplace time constraints for the completion of tasks • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit

	○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context of performance	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ○ project or work activities conducted over a period of time so that the candidate is able co-ordinate the complete function organisational process within a venue ○ demonstration of skills on more than one occasion and to address differing function circumstances and needs to ensure range and consistency • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the skills required to sell, co-ordinate and finalise all details for functions can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ review of actual function documentation and reports prepared by the candidate ○ evaluation of a function organised by the candidate, including documentation and operational efficiency and cohesiveness ○ evaluation of reports prepared by the candidate detailing the way in which a particular function was organised and highlighting key issues and challenges in the function organisation process ○ written and oral questioning or interview to test knowledge of function co-ordination procedures and materials ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Identifying the customer's specific needs, sourcing supplier information and evaluating the most appropriate fit for the customer • Communicating ideas and information - Providing information to customers on the conditions specifically applicable to the function sold to them • Planning and organising activities - Determining and working towards the customer's quotation deadline, prioritising the order of costings to be provided to various customers • Working with teams and others - Requesting information from internal and external suppliers, sharing newly released information with colleagues involved in organising functions • Using mathematical ideas and techniques - Calculating the costs of all components of the function • Solving problems - Finding alternative suppliers to meet the customer's needs when first offered cost is not suitable • Using technology - Using a calculator, using a computerised system to produce customer documentation Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME02B	PROVIDE ON SITE MEETING/EVENT MANAGEMENT SERVICES
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to coordinate the final preparation and set-up of a major event comprising multiple components and to manage all aspects of the on-site operation. One site management requires considerable communication, negotiation and problem solving skills and would normally be undertaken by senior meeting or events personnel.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare for on-site management	1.1 Develop plans for on-site management in accordance with agreed procedures for the meeting or event 1.2 Check final arrangements for all aspects of the meeting or event and attend to any discrepancies 1.3 Create and collate material to facilitate effective on-site management 1.4 Provide an accurate briefing to operational staff and contractors prior to the meeting or event in an appropriate format including clarification of roles and responsibilities
2 Oversee meeting/event set up	2.1 Establish contact with the nominated contractor personnel at the appropriate time and reconfirm and agree to all requirements 2.2 Make and agree to any necessary adjustments with the contractor 2.3 Check all aspects of the event or meeting set up against the pre-arranged agreements including: availability of all materials and equipment, room set ups, staging, technical equipment, display and signage, food and beverage arrangements, registration areas 2.4 Check that all aspects of the venue space used and any equipment has been set up to allow for easy access, especially for those with disabilities, and to avoid risk of injury to guests, delegates and colleagues 2.5 Identify any deficiencies and discrepancies and take prompt action to rectify the situation 2.6 Brief any additional on-site staff on the full details of the meeting or event operation including communication and control mechanisms
3 Monitor meeting/event operation	3.1 Monitor sessions and activities throughout the meeting or event through observation and appropriate reporting processes 3.2 Identify any problems as they arise and take prompt action to resolve the situation 3.3 Identify any additional requirements and promptly organise them 3.4 Liaise with the customer throughout the meeting or event to ensure it is progressing to his/her satisfaction 3.5 Liaise with all contractors on an ongoing basis to ensure effective delivery of services
4 Oversee meeting/event breakdown	4.1 Oversee the break down of the meeting or event to ensure it is completed in accordance with agreements 4.2 Coordinate the packing and removal of all materials and equipment in accordance with pre-arranged details 4.3 Check the venue to ensure items and belongings are not left behind 4.4 De brief with contractors if it is necessary to discuss any difficulties or suggestions for future improvements 4.5 Check and sign accounts in accordance with contractor agreements 4.6 Note any outstanding items requiring post-event action

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A major event comprising multiple components	must include - multiple contractors - substantial catering (ie, not simply an afternoon tea) - multiple speakers, performers or exhibitors
Procedures	may include - registrations - organising committee - record-keeping and reporting - special needs - risk management - crowd control - event timings - contractor communication
Materials and plan facilitate effective on-site management	may include - running sheets - copies of agreements with clients - copies of agreements with all contractors - contact numbers for all contractors - briefing papers
Contractors	may include - venues - speakers - staging and audio visual suppliers - display suppliers - caterers entertainers - equipment hire companies
Deficiencies and problems	may include - incorrect room set ups - incorrect staging - faulty or non availability of technical equipment - lack of equipment to manage displays and signage - shortage of food and beverage - inappropriate space at registration areas

Communication and control mechanisms	may include • guidelines on reporting lines during the event • regularity of updates to event managers • specific performance indicators • contingency plans
The sport and recreation industry	covers • industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of providing on site meeting/event management services - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - manage the on-site operation of a meeting or event including all aspects of preparation, set up, operation and move out - demonstrate knowledge of the range of issues and problems that may arise during the conduct of meeting/events
Interdependent assessment of units	- This unit must be assessed after the attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - THHGGA09B Manage projects - THTFME06A Manage event contractors
Required knowledge and skills	- Required knowledge - Typical systems, procedures and logistics for on site management including - contractor communication mechanisms and protocols, eg, main liaison person within a venue, hierarchy of control, walkie-talkie options - running sheets and how they are used - the importance of and techniques for managing stress and time during the operation of an event - characteristics of written contractor documentation including event order and other technical specifications - safety/risk issues associated with the movement of numbers of people at meeting and event venues - Required skills - Problem solving skills - Negotiation skills in specific relation to time constraints of on-site activities
Resource Implications	- Physical resources - assessment of this competency requires access to - appropriate venue - meeting and event operational documents and equipment - Human resources - assessment of this competency will require - involvement of a team of operational staff and suppliers - human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area

	▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ○ project or work activities that allow the candidate to manage the on-site aspects of a meeting or event within an appropriate venue on more than one occasion to ensure that skills in dealing with a range of circumstances is demonstrated ○ involvement of a team of operational staff involved in delivering a meeting or event ○ involvement of suppliers of equipment and services ○ realistic ratios of operational staff to delegates and guests ○ presence of commercially-realistic time pressures related to the operation of an event ○ use of meeting and event operational documents and equipment • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the skills required to manage on-site event operations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ evaluation of the operational efficiency and service quality at an event site managed by the candidate ○ evaluation of reports prepared by the candidate on the event management process including the issues and challenges associated with delivering effective outcomes ○ review of documentation such as running sheets and other site management plans prepared by the candidate ○ review of staff or supplier briefing documents and reconfirmation checklists prepared by the candidate ○ written and oral questioning or interview to test knowledge of management procedures and systems, meeting and event documentation requirements and negotiating techniques ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Checking all aspects of the event or meeting set up against the pre-arranged agreements • Communicating ideas and information - Providing a pre-event briefing to operational staff and suppliers, discussing problems with operational staff and providing advice on how to solve • Planning and organising activities - Developing plans for on-site management, preparing service reconfirmation checklists • Working with teams and others - Providing instructions to operational team members, briefing and de-briefing suppliers and staff • Using mathematical ideas and techniques - Checking capacity of venue outlets against numbers of registrations, checking and signing accounts in accordance with supplier agreements • Solving problems - Identifying room set up deficiencies and discrepancies in supply of equipment and taking prompt action to rectify the situation • Using technology - Creating and collating a computerised running sheet Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME03A	DEVELOP AND UPDATE EVENTS INDUSTRY KNOWLEDGE
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to develop and update general knowledge of the meetings and events industry including industry structure, legal issues and current technology. This knowledge underpins effective performance in all meeting and event organisation and management roles.

ELEMENT	PERFORMANCE CRITERIA
1 Source and apply information on the structure and operation of the event industry	1.1 Identify sources of information on the event industry correctly including information relating to industry structure, different event types and staging elements, event protocols, major industry bodies/associations, impacts of event on local economies, career opportunities 1.2 Use knowledge of the event industry in the correct context to enhance the quality of work performance
2 Source and apply information on ethical and legal issues for the event industry	2.1 Obtain information on legal and ethical issues to assist effective work performance 2.2 Conduct day-to-day event organisation activities in accordance with legal obligations and ethical industry practices
3 Source and apply information on event industry technology	3.1 Obtain information on current and emerging technologies that impact on the event organisation process 3.2 Assess the potential effects of different technologies on the event organisation process 3.3 Apply knowledge of current and emerging technology in day-to-day work activities
4 Update event industry knowledge	4.1 Identify and use a range of opportunities to update knowledge of the events industry 4.2 Monitor current issues of concern to the industry 4.3 Share updated knowledge with customers and colleagues as appropriate, and incorporate into day-to-day work activities

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Events refers to all types of events	including • conferences • symposia • exhibitions • festivals • promotions • shows • sporting events • parades • cultural celebrations • trade and consumer shows • social events • public events • corporate events • charitable, fund-raising events
Opportunities to update knowledge	may include • industry seminars • training courses • industry association membership • participation in events industry association activities • informal networking with colleagues • reading industry journals • web research
Ethical industry practices in the context of events	may include • commission procedures • booking venues • confidentiality • overbooking • sub-contracting • pricing
Legal issues in the context of events	may include • public liability • duty of care • licensing • risk management • occupational health and safety

Technologies that impact on the event organisation process	may relate to • project management systems • delegate registration and tracking systems • Computer Aided Drafting systems • Internal venue booking systems
The sport and recreation industry	covers • industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge to develop and update the knowledge base of the events industry - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate general knowledge of the events industry as listed under Required Knowledge and Skills - understand how industry knowledge can be applied to work activities to maximise effective performance - demonstrate knowledge of ways to maintain currency of knowledge
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - THHHCO01B Develop and update hospitality industry knowledge - THTTCO01B Develop and update tourism industry knowledge - This unit must be in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - Main types of events as listed in the Range Statement including the following for different event types - objectives/roles - scope - nature of audience - key stakeholders - key elements of staging an event - Structure and function of the events industry, including - relationships between the event industry and other industries such as tourism, hospitality and entertainment - businesses and organisations involved in the industry - key motivations for hosting events - The role and impact of events on local economies - Legal and ethical issues that impact on event management including overview of relevant legislations - Current and emerging technology for different aspects of the event management process - Required skills - Nil
Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry

	through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency of performance	• Competence in the unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ○ application of knowledge to specific event organisational contexts • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the application of knowledge to event organisation activities can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ case studies and problem solving to assess application of knowledge to different event organisation situations and contexts ○ questions to assess knowledge of different aspects of the events industry as detailed in the Evidence Guide ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	-	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Deciding whether to join an industry association based on evaluation of promotional materials • Communicating ideas and information - Liaising with clients on protocol requirements for a given event • Planning and organising activities - Organising a personal program of professional development activities for the upcoming year • Working with teams and others - Discussing industry developments with colleagues • Using mathematical ideas and techniques - Not applicable • Solving problems - Respond to situation organising a particular type of event that includes components of which you have knowledge • Using technology - Using the Internet to source information on the events industry Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME04A	DEVELOP AN EVENT CONCEPT
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to develop the overall concept, theme and format for a major event comprising multiple components. An event manager would generally undertake this process at the commencement of the event management cycle in consultation with key stakeholders. Sometimes the concept development phase is undertaken as part of the event bidding process. Event bids and proposals are covered in unit THHPPD08D Plan and develop event proposals and bids. This unit also shares some similarities with unit THTPPD09B Develop conference programs but is broader in application.

ELEMENT	PERFORMANCE CRITERIA
1 Identify overall event objectives and scope	1.1 Clarify and agree the key objectives of the event in consultation with stakeholders 1.2 Analyse key information and consult with stakeholders to determine the broad scope of the event including indicators for: size and numbers of guests/delegates, audience/participant needs, location(s), duration, financial investment and other resourcing issues 1.3 Identify and analyse internal and external factors which may impact on the event
2 Establish event concept theme and format	2.1 Develop an overall event concept, theme and format which reflects key objectives and meets the needs of the potential audience 2.2 Incorporate creative elements into the event concept and theme 2.3 Verify the operational practicality and cohesiveness of the concept, theme and format through consultation and analysis 2.4 Develop a summary of key logistical requirements based on the overall concept, theme and format 2.5 Provide accurate and complete information on the concept, theme and format to all relevant stakeholders to facilitate timely and effective planning and implementation 2.6 Obtain approval from relevant stakeholders prior to implementation

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A major event comprising multiple components	must include - multiple contractors - substantial catering (ie, not simply an afternoon tea) - multiple speakers, performers or exhibitors - requirement for display, decoration or themes
Key staging requirements that must relate to the event concept, theme and format	may include - venue decorations - talent - stage set-up and design - catering - technical effects (eg, sound, lighting, audio-visual) - collateral material
Internal and external factors to be assessed	may include - resource availability (eg, human, financial, physical) - potential for attraction of additional resources (eg, sponsorship, co-hosting) - level of management commitment - restrictions on lead-time - potential levels of participation and interest - competitive environment - timing and duration factors (eg, impact of public holidays and other public events) - potential contributors - climate - access factors - marketing and promotional issues (eg, potential for media coverage)
Stakeholders	may include - event principal - local community - organising committees - local authorities - customers - colleagues - staging contractors - entertainers

The sport and recreation industry	covers • industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of developing an event concept • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ develop a concept and format that reflects event objectives, is operationally practical and which results in the achievement of objectives ○ demonstrate knowledge of typical formats for different styles of events ○ demonstrate knowledge of the creative options when developing an event concept
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THTFME05A Select event venues and sites ○ THTPPD08B Plan and develop event proposals and bids ○ THTPPD11B Develop and implement event management systems and procedures ○ THTFME06A Manage event staging ○ THHGLE14A Prepare and monitor budgets ○ THHGGA09A Manage projects
Required knowledge and skills	• Required knowledge ○ Key stakeholders for different types of event ○ Internal and external factors to be considered when developing an event concept ○ Key management issues that impact on development of an event concept ○ Creative options for different types of event ○ Technical and staging options for different types of event • Required skills ○ Nil
Resource Implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require ○ access to and interaction with event industry suppliers ○ involvement of and interaction with an event principle or organising group ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the

	industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. • Assessment must ensure ○ development of an event concept, theme and format for a specified need ○ access to and interaction with event industry suppliers ○ involvement of interaction with an event principal or organising group • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the skills to develop an event concept can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ case studies to develop concepts, themes and formats for different types of events ○ evaluation of concept, theme and format through a candidate presentation or 'bid' for an event ○ oral or written questions to assess knowledge of the range of key market factors and management issues to be considered in the concept development phase ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Completing and reporting on an internal research process to determine key factors affecting a corporate event • Communicating ideas and information - Developing concept, theme and format proposals for presentation to an event organising committee • Planning and organising activities - Liaising with multiple potential contractors to develop an event concept within a very short timeframe • Working with teams and others - Coordinating a brainstorming session to develop the creative elements of an event • Using mathematical ideas and techniques - Estimating costs for particular concepts and formats • Solving problems - Developing a solution to a situation where the event principal's desire for a particular creative component does not fit with the overall concept • Using technology - Using computer software to develop an animated presentation on an event concept Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME05A	SELECT EVENT VENUES AND SITES
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to undertake the venue/site selection process for a major event comprising multiple components. It requires the application of significant analytical and research skills to complete the process of matching an event to particular site or venue. The unit THTPPD11B Develop and implement event management systems and procedures builds on this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Analyse venue or site requirements	1.1 Analyse event-specific venue or site requirements based on detailed review of all aspects of the proposed event 1.2 Develop accurate and complete specifications for venues or sites to facilitate the research process 1.3 Integrate the needs of all stakeholders, including those with disabilities, into venue or site specifications
2 Source event venues or sites	2.1 Research potential venues or sites using appropriate information sources and research methods 2.2 Assess the suitability of venues or sites based on comparison of services offered with specifications 2.3 Assess the need for and nature of contingency planning required by specific venues or sites 2.4 Assess venue or site capacity to deliver quality outcomes in relation to customer service, cooperative management and past experience 2.5 Negotiate and liaise with personnel from potentially suitable venues or sites to ensure all event requirements can be met and to address potential problem areas 2.6 Assess the need for tentative bookings and take action promptly 2.7 Co-ordinate multiple site and venue selection when required in a logical manner 2.8 Provide clear and accurate briefings on venue or site options to colleagues and key stakeholders to include recommendations and rationale
3 Confirm venue or site arrangements	3.1 Confirm venue or site arrangements accurately in writing when the selection process is finalised 3.2 Review and sign venue or site contracts within appropriate timeframes and within scope of individual responsibility 3.3 Integrate specific venue and site planning issues into overall event management systems promptly

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A major event comprising multiple components	must include - multiple contractors - substantial catering (ie, not simply an afternoon tea) - multiple speakers, performers or exhibitors - requirement for display, decoration or themes
Developing venue or site specifications	include - overall theme or image - estimated numbers - facilities and services to be provided - budget - audience/delegate profile and location
Venue or site specifications	in relation to - availability - facilities and services (eg, catering, size of area, equipment) - staging - capacity - budget parameters - access - access and timing (set-up and break down)
Stakeholders	may include - attendees/delegates/guests - host organisation - contractors/suppliers - sponsors - emergency services - regulatory authorities
Information sources	may include - local/regional/State tourism organisations - Convention and Visitor Bureau - venue publications and directories - destination brochures - trade journals - Internet

Research methods	may include • using personal event industry networks • desk research • calling for tenders • personal venue or site inspection
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of selecting event venues and sites - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - research and select an appropriate venue or site for a nominated event comprising multiple components - interpret the range of information used in the venue or site selection process - demonstrate knowledge of different venue and site options within the local area
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - THTFME04A Develop an event concept - THTPPD11B Develop and implement event management systems and procedures - THTFME06A Manage event contractors
Required knowledge and skills	- Required knowledge - Different styles of venues and sites, services offered and their suitability for particular event types - Venue and site options within a given locality - Presentation styles for venue and site information and interpretation of this information - Information sources for venue and site information - The features and requirements of typical venue or site contracts - Typical operational structures within a venue including relevant personnel, internal networks and inter-relationships and reporting structures - Required skills - Nil
Resource implications	- Physical resources - assessment of this competency requires access to - venues and sites - current industry documentation and publications - Human resources - assessment of this competency will require - venue personnel - event stakeholders - human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional

	- activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. • Assessment must ensure ○ conduct of the venue/site selection process for an event which becomes an event managed by the candidate ○ access to venues and sites relevant to different types of event ○ use of current industry documentation and publications relating to venues and sites ○ access to and liaison with venue personnel during the selection process ○ involvement of and consultation with event stakeholders • This unit of competency must be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the ability to undertake the complete venue or site selection process can be practically demonstrated. Methods must include assessment of knowledge as well as assessment for this unit ○ evaluation of the suitability of a venue or site selected by the candidate through attendance at the event ○ case studies to assess ability to source and select venues and sites for different types of events ○ review of documentation and specifications prepared by the candidate ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Analysing information from a range of venues or sites and assessing suitability • Communicating ideas and information - Developing an event specification document • Planning and organising activities - Selecting and booking venues for an event which will tour four cities in a week • Working with teams and others - Running a venue sub-committee meeting to assess venue options • Using mathematical ideas and techniques - Calculating floor space requirements for a given event • Solving problems - Adjusting venues and dates when venue availability is limited • Using technology - Use a computer aided drafting (CAD) system to assess space requirements Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME06A	MANAGE EVENT CONTRACTORS
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to manage the staging and operation of a major indoor event comprising multiple components. It does not cover the high levels of technical expertise required to actually provide these services, but focuses on the key knowledge and skills required to oversee the process from an organisational and contractor management perspective. This role may be undertaken by a manager working within an event venue, by an external manager or a combination of both.

ELEMENT	PERFORMANCE CRITERIA
1 Identify event operational requirements	1.1 Analyse event staging requirements based on detailed review of all aspects of the proposed event 1.2 Develop an accurate summary of staging requirements for each event component in consultation with key stakeholders 1.3 Incorporate safety and risk management issues into all planning documentation and processes
2 Source contractors	2.1 Identify and source appropriate contractors to provide services for the event 2.2 Provide accurate briefings or specifications on precise staging requirements to contractors 2.3 Obtain complete and timely quotations for the provision of services 2.4 Analyse quotations and select contractors in consultation with key stakeholders 2.5 Confirm agreements with contractors in writing to include details and costs of all services
3 Monitor contractors	3.1 Monitor progress, including safety issues, at regular intervals through ongoing liaison with contractors and other stakeholders 3.2 Identify the need for adjustments and organise appropriate changes with confirmation in writing 3.3 Negotiate adjustments to maintain the integrity and quality of the event 3.4 Evaluate work completed against event requirements and time schedules, and take appropriate action to address delays

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
A major event comprising multiple components	must include • multiple contractors • substantial catering (ie, not simply an afternoon tea) • multiple speakers, performers or exhibitors • requirement for display, decoration or themes
Contractors	may include • venues • speakers • staging and audio visual suppliers • display suppliers • caterers • entertainers • equipment hire companies
Staging elements or requirements	may relate to • exhibition set-up • audio-visual • display and decoration • furniture • special effects • entertainment • lighting • sound • stage design • rigging • catering and catering set-up • security
Specifications for contractor services	may include or relate to • price • performance standards • timelines • technical specifications for equipment etc • theme-related requirements • regulatory requirements • previous experience
The sport and	• covers industry sectors of community recreation, fitness, outdoor

recreation industry	recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of managing event contractors • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate general knowledge of all event staging services and terminology as detailed under Required Knowledge and Skills ○ organise and coordinate multiple contractors as part of the overall event management process
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THTFME04A Develop an event concept ○ THTFME05A Select event venues and sites
Required knowledge and skills	• Required knowledge ○ Roles and responsibilities of organisations involved in event staging ○ Suppliers of staging services and sources of information on staging services ○ Risk management issues to be considered for key areas of event staging ○ The key inclusions for contractor briefing or specification documents ○ Knowledge of terminology, services and key technology in key areas of staging including ▪ catering ▪ venue decorating ▪ audio-visual options ▪ sound amplifications ▪ lighting ▪ rigging ▪ live entertainment ▪ registration areas ▪ display ▪ security ▪ electronic media coverage of events ▪ safety equipment • Required skills ○ Nil
Resource implications	• Physical resources - assessment of this competency requires access to ○ venues ○ all equipment required for the staging of an event • Human resources - assessment of this competency will require

	○ multiple contractors ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. • Assessment must ensure ○ management of the staging of an indoor event comprising multiple components ○ venues for staging an indoor event ○ all equipment required for the staging of an event ○ liaison with and involvement of multiple contractors • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the ability to manage the staging of an event can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ evaluation of the staging at an event managed by the candidate through attendance at the event ○ review of documentation used to manage contractors prepared by the candidate ○ questioning of contractors to assess the organisational skills of the candidate ○ case studies to assess ability to determine staging requirements for different events ○ oral or written questions to assess knowledge of key staging services and relevant terminology ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing competitive quotes from staging suppliers • Communicating ideas and information - Developing a tender brief for staging suppliers • Planning and organising activities - Appointing and managing multiple suppliers before, during and after an event • Working with teams and others - Negotiating with suppliers on changing requirements • Using mathematical ideas and techniques - Calculating numbers of exhibition panels required for a trade show • Solving problems - Negotiating with a supplier who is failing to meet contract obligations • Using technology - Using a computerised system to create different staging scenarios Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME07A	ORGANISE AND MONITOR INFRASTRUCTURE FOR OUTDOOR EVENTS
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to co-ordinate the infrastructure and facilities that must be present at an outdoor event. It focuses solely on the additional elements of outdoor event organisation and therefore builds on other event management units such as unit THTFME06A Manage event contractors.

ELEMENT	PERFORMANCE CRITERIA
1 Identify infrastructure requirements for outdoor events	1.1 Liaise with local authorities at the commencement of the event management cycle to ensure statutory requirements are integrated into the planning process 1.2 Identify and analyse the infrastructure and facility requirements for outdoor events , based on a detailed review of all aspects of the proposed event 1.3 Develop an accurate summary of infrastructure requirements for each event component in consultation with key stakeholders 1.4 Incorporate safety, security and risk management issues of particular relevance to outdoor events into all planning documentation and processes
2 Organise infrastructure for outdoor events	2.1 Identify and source appropriate contractors 2.2 Provide accurate briefings to contractors in relation to infrastructure requirements ensuring all safety and legal requirements are covered 2.3 Obtain complete and timely quotations for the provision of services 2.4 Analyse quotations and select contractors in accordance with legal and licensing requirements and in consultation with key stakeholders 2.5 Involve local authorities in the planning process by provision of relevant and timely information 2.6 Take account of stakeholder views, including local residents, in the organisational process
3 Monitor infrastructure	3.1 Monitor the progress of staging elements through ongoing liaison with contractors 3.2 Identify the need for adjustments and organise appropriate changes with confirmation in writing 3.3 Evaluate work completed against event requirements prior to event commencement and take appropriate corrective action where necessary

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Infrastructure requirements applicable to outdoor events	may include • power supply • water supply • heating or air-conditioning • public toilets • erection of temporary structures • scaffolding • emergency services • car and coach parking • transport systems • camping sites or other temporary accommodation • signage • media services and impacts • disabled access • waste management
Local authorities	may include • local government • State government • police • ambulance • fire services
Licensing requirements	may relate to • builders and building work • electricians and electrical work • plumbers • gas fitters • handling of hazardous materials • forklift operations • special effects
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions

	• workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of organising and monitoring infrastructure for outdoor events • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ organise and monitor infrastructure for an outdoor event ○ demonstrate knowledge of the issues that specifically impact on the organisation of outdoor events, including requirements of local authorities, Australian Standards and Occupational Health and Safety regulations
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ THTFME06A Manage event contractors • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ THTFME04A Develop an event concept ○ THTFME05A Select event venues and sites
Required knowledge and skills	• Required knowledge ○ Roles and responsibilities of organisations involved in staging of outdoor events including government agencies and other authorities ○ Suppliers of services related to outdoor event infrastructure and sources of information on those suppliers ○ Risk management and safety issues to be considered for key areas of event staging ○ Australian Standards that relate to typical event operations ○ Knowledge of terminology and services in key areas related to outdoor event infrastructure including ▪ temporary water and power supply ▪ portable/demountable toilets ▪ temporary structures (eg.. marquees, demountables) ▪ mobile catering outlets • Required skills ○ Nil
Resource implications	• Physical resources - assessment of this competency requires access to ○ venues or sites ○ all equipment required for the staging of an outdoor event • Human resources - assessment of this competency will require ○ suppliers and local authorities ○ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional

	▪ activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. • Assessment must ensure ○ organisation and monitoring of the infrastructure requirements for an outdoor event where the candidate plays a key management role ○ access to venues or sites for staging of an outdoor event ○ access to all equipment required for the staging of an outdoor event ○ liaison with and involvement of suppliers and local authorities • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that ability to organise and monitor the methods must be chosen to ensure that ability to organise and monitor the infrastructure for an outdoor event can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ evaluation of the infrastructure through attendance at an event managed by the candidate ○ review of documentation used to co-ordinate infrastructure prepared by the candidate ○ questioning of contractors to assess the organisational skills of the candidate ○ case studies to assess ability to determine infrastructure requirements for different events ○ questions to assess knowledge of infrastructure services and terminology ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing the legal issues to be considered for an outdoor event • Communicating ideas and information - Providing a briefing to the local council of the scope of an outdoor event • Planning and organising activities - Coordinating the activities of multiple trades people prior to an event • Working with teams and others - Managing a progress meeting of event coordinators all working on different aspects of an outdoor event • Using mathematical ideas and techniques - Calculating the required size of a marquee to meet estimated audience numbers • Solving problems - Develop a solution to a situation where the proposed site plan or race route contravenes local council guidelines • Using technology - Using relevant software Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME08A	INTEGRATE TECHNOLOGY INTO THE EVENT MANAGEMENT PROCESS
EVT	Events

DESCRIPTION: This unit describes the skills and knowledge required to integrate key technology of specific relevance to event management. The unit builds on the introductory knowledge of technology found in the unit: develop and update events industry knowledge.

ELEMENT	PERFORMANCE CRITERIA
1 Identify potential for use of technology in the event management process	1.1 Assess the potential for technology to improve <i>specific aspects of event management</i> and operation 1.2 Identify and research the features and costs of specific <i>technologies</i> that may apply to an event 1.3 Make appropriate recommendations or suggestions regarding the use of specific technologies to relevant stakeholders
2 Integrate technology into the event management process	2.1 Integrate technology into event management processes in a timely manner 2.2 Liaise with other event contractors to ensure use of appropriate and current technology in event staging 2.3 Organise or provide appropriate training on technology for colleagues, allowing adequate time for skills acquisition 2.4 Monitor the effectiveness of technology and take appropriate action to address any identified problems 2.5 Use knowledge gained from use of technologies to inform and enhance future event management activities

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Specific aspects of event management	may include • administration (eg, ticketing, registration, project planning, finance) • staffing • marketing • staging
Technologies	will vary according to the type of event but may include • integrated event management software • project management software • computer aided drafting • ticketing systems • delegate registration systems
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of integrating technology into the event management process - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - demonstrate knowledge of the range of current technology used in the event management process - apply the use of technology to specific aspects of event management
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Event management units
Required knowledge and skills	- Required knowledge - General awareness of specific technology options for key aspects of event management including - project management - registrations - ticketing - marketing - the way information may be presented at a meeting or event - Overview of new and emerging technologies in event staging - Required skills - Application of the Internet as an event management and marketing tool
Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and

	contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ◦ application of knowledge to specific event management contexts • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that application of technology knowledge can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ◦ case studies to assess ability to apply different technologies to specific event management contexts ◦ evaluation of technology assessments prepared by the candidate ◦ oral or written questions to assess knowledge of features of current event management technology ◦ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	1	2	-	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing the most appropriate project management software to use for a given context • Communicating ideas and information - Providing a briefing on different technology options to an organising committee • Planning and organising activities - Organising the introduction of new technology • Working with teams and others - Providing coaching on a given technology to a colleague • Using mathematical ideas and techniques - Not applicable • Solving problems - Developing a solution to address a recurring technological problem • Using technology - Using various features of systems to assess their suitability for event management Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTFME09A	DEVELOP AND UPDATE KNOWLEDGE OF PROTOCOL
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to develop and apply knowledge of protocol to a range of tourism and hospitality related activities. It is particularly relevant to those involved in the management and operation of events, including functions.

ELEMENT	PERFORMANCE CRITERIA
1 Seek information appropriate protocol	1.1 Identify sources of accurate information on protocol correctly 1.2 Access relevant protocol information in response to workplace needs
2 Integrate appropriate protocol procedures into work activities	2.1 Identify the areas of work activity that require appropriate use of protocol in a timely manner 2.2 Integrate the correct use of protocol into work activities 2.3 Liaise with colleagues and other stakeholders to determine appropriate protocol requirements 2.4 Provide appropriate information on protocol to relevant colleagues and stakeholders
3 Update knowledge of protocol	3.1 Identify and use opportunities to update protocol knowledge 3.2 Share updated knowledge with customers and colleagues as appropriate and incorporate into day-to-day working activities

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Sources of information on protocol	may include - libraries - internet - Federal, State and Local Governments protocol departments - Aboriginal Land Councils - Australia Day Councils - Office of the United Nations
Work activities that require integration of protocol	may include - issuing invitations - preparing running sheets - preparation of briefing papers - liaison with dignitaries and officials - correspondence to dignitaries and officials - providing various services during the conduct of an event, eg, on-site management, service of food and beverage
Functions where protocol need to be used	may include - civic receptions - formal parades - freedom of city ceremonies - national day receptions - citizenship ceremonies - private functions
The sport and recreation industry	covers - industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications

	• significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to develop and apply protocol to a range of tourism and hospitality related activities • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate knowledge of where to source accurate information on protocol for specific situations ○ demonstrate knowledge of protocols as specified under essential knowledge and skills
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Event units
Required knowledge and skills	• Required knowledge ○ The importance and role of protocol in different events and situations ○ Key sources of information on protocol ○ Main types of civic functions held in Australia ○ The Australian honours systems including order precedence, ranks and forms of address and wearing of honours and medals ○ Appropriate protocols for the involvement of indigenous Australians and other cultural groups events ○ Protocol procedures for different types of function including ▪ invitations to VIPs ▪ arrival procedures, including for heads of state or government officials ▪ introduction protocols and order of speakers ▪ order of precedence for official guests ▪ seating arrangements ▪ dress styles • Required skills ○ Correct use of national and State symbols including flags, anthems and military salutes ○ Forms of address for different VIPs and dignitaries, both written correspondence and in oral communication
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the

	○ relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Contexts for performance	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ○ project or work activities that allow the candidate to apply protocol knowledge to specific event management, tourism and hospitality situations • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that knowledge of protocol can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ case studies and projects to assess ability to apply knowledge of protocol to different workplace situations ○ oral or written questions to assess knowledge of protocol for different situations ○ review of portfolio of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	-	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Determining the protocol information required for a particular event • Communicating ideas and information - Advising colleagues about protocol requirements for a given event • Planning and organising activities - Integrating protocol into event organisation activities • Working with teams and others - Liaising with protocol officers from a government department • Using mathematical ideas and techniques - Not applicable • Solving problems - Finding protocol information in relation to a totally unknown situation • Using technology - Using the Internet to source protocol information Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTPPD08B	PLAN AND DEVELOP MEETING, EVENT PROPOSALS AND BIDS
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to plan and develop proposals and bids for the staging of meetings and events. Depending on the context, this role could be performed by a wide range of individuals including event managers, local or regional tourism managers, venue managers and marketing managers.

ELEMENT	PERFORMANCE CRITERIA
1 Interpret brief	1.1 Interpret contents of the brief accurately <i>interpret and assess</i> in terms of the organisation's capacity to meet the stated requirements 1.2 Identify and plan <i>action required</i> for development of the proposal/bid 1.3 Undertake liaison with the customer to clarify requirements where appropriate
2 Develop proposal/bid details	2.1 Develop <i>details for inclusion in the proposal/bid</i> after consultation with suppliers and other relevant agencies 2.2 Develop options to meet and where possible exceed the expectations of the customer 2.3 Seek support for the proposal/bid from <i>relevant individuals and agencies</i> 2.4 Evaluate possible competitors and <i>develop strategies</i> to address competitive issues
3 Develop bid materials	3.1 Prepare bid materials within the <i>designated timelines</i> in accordance with the requirements of the brief 3.2 Present materials in a format that <i>maximises the use of presentation and promotional techniques</i>

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Details to be included in the proposal/bid	will vary but may include information on • general concepts and themes • business program • social program • costs • touring • accommodation • entertainment • staging • special features • sample promotional materials • references and details of other successful undertakings • organisational information (eg structure, personnel etc) • support statements, information from other organisations • approach to environmental impacts and issues
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of planning and developing meeting, event proposals and bids - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - undertake the proposal/bidding process for a specific meeting/event including effective assessment of the brief, coordination of all details and resources to meet the bid requirements and professional presentation of bid materials and documents - demonstrate knowledge of typical bid/proposal requirements and formats
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - THHGGA04B Prepare business documents - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - Components required for meeting/event proposals and bids and product knowledge in relation to those components - Networks and interrelationships of different industry sectors in relation to meeting/event proposal/bid - Required skills - Presentation techniques for proposal and bid materials including current technology
Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this competency will require - involvement of multiple individuals or agencies - customer and with potential suppliers - human resource consistent with those Assessment Guidelines. That is, assessors (or persons within the assessment team should) - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the National Competency Standards for Assessment: BSZ401A, BSZ402A and BSZ403A
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and

	contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. • Assessment must ensure ○ project or work activities that allow the candidate to develop a bid/proposal for a specific event in a competitive bidding environment ○ involvement of multiple individuals or agencies in the bid process ○ liaison with the customer and potential suppliers • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that the presentation of a proposal or bid can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. ○ the following examples are appropriate for this unit ▪ project to bid for a meeting or event being staged within a college or local community ▪ case studies to assess knowledge of the components required for inclusion in different types of bids ▪ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing quotes and product information from suppliers to make an effective selection • Communicating ideas and information - Creating an effective presentation format for the bid document • Planning and organising activities - Allocating responsibilities to team members and monitoring progress on bid preparations • Working with teams and others - Running team meetings to monitor progress • Using mathematical ideas and techniques - Making cost estimates for inclusion in the bid document • Solving problems - Creating a proposal from scratch within an extremely short timeframe • Using technology - Designing an animated computer presentation Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTPPD09B	DEVELOP CONFERENCE PROGRAMS
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to design a conference program. Meetings managers, either internal or external to the sponsoring organisation, would generally undertake this role.

ELEMENT	PERFORMANCE CRITERIA
1 Identify conference objectives	1.1 Identify overall context and scope of the conference 1.2 Develop and agree specific conference objectives in consultation with relevant colleagues and/or customers
2 Design conference program	2.1 Select dates and times to meet agreed objectives 2.2 Develop a theme to complement conference objectives 2.3 Develop overall conference format within known budget, venue and staging constraints 2.4 Design and integrate specific components of the program including the following as appropriate: business program, breaks, food and beverage, social program, pre and post touring elements 2.5 Develop a business program based on principles of adult learning to incorporate an appropriate range of activities
3 Finalise program details	3.1 Present the proposed conference program to the appropriate people within required timeframe 3.2 Agree/gain approval for details in accordance with agreed procedures 3.3 Initiate appropriate actions in relation to dissemination and publication of conference program

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Specific components of the conference program	may include • business program • breaks • food and beverage • social program • pre and post touring elements
Issues to be considered when designing the business program	may include • workshops • plenary sessions • break-out sessions • key note speakers • facilitators • speaker availability • venue-related issues
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of developing conference programs - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment - In particular, assessment must confirm the ability to - design a practical conference program to meet overall objectives and the needs of the target audience within budget guidelines - demonstrate detailed knowledge of the range of options available to conference organisers in terms of venues, staging, format and pre/post touring components
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - THTPPD03B Source and package tourism products and services - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - Typical conference session formats - Range of options for conference staging and venue set ups - Principles of adult learning - Needs of different segments in the market in relation to conference activities, eg, corporate, associations, government - Required skills - Nil
Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this competency will require - sporting organisation or individual - the involvement of a team - human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and

	contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment must ensure ○ project or work activities that allow the candidate to develop a program for a conference that is actually held ○ the involvement of a sponsoring organisation or individual with whom the candidate must liaise ○ the involvement of a team in the conference program development • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons • Assessment methods must be chosen to ensure that skills in program development can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit ○ project to develop a program for a conference ○ case studies or projects to assess knowledge of programming for different types of conferences ○ review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Assessing and selecting optimum pre and post touring options or social events for a given conference • Communicating ideas and information - Presenting a draft conference program proposal to the sponsoring organisation • Planning and organising activities - Developing precise schedule for all conference activities • Working with teams and others - Running a mind-mapping session with colleagues to source ideas for a conference program • Using mathematical ideas and techniques - Calculating costs to ensure they remain within budget guidelines • Solving problems - Adjusting a draft program to meet a 20 percent budget cutback • Using technology - Using a computer to calculate program costs Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

THTPPD10B	DEVELOP AND IMPLEMENT SPONSORSHIP PLANS
EVT	Events

DESCRIPTION: This unit deals with the skills and knowledge required to manage sponsorship activities. It has particular relevance for the meeting and events sector and for the visitor information services sector where extensive involvement in event management and sponsorship activity occurs. It may also relate to ongoing sponsorship planning within an organisation.

ELEMENT	PERFORMANCE CRITERIA
1 Identify sponsorship opportunities	1.1 Identify <i>items</i> , activities or <i>projects to be sponsored</i> based on potential appeal to sponsors and the needs of the organisation 1.2 Identify <i>potential sponsors</i> based on audience reach and previous sponsors 1.3 Develop financial targets for sponsorship 1.4 Agree sponsorship activities and targets with the meeting/event principal or relevant management
2 Create and promote a sponsorship package	2.1 Develop sponsorship packages to include full breakdown of costs and benefits and other relevant sponsor information 2.2 Produce information regarding sponsorship opportunities in a professional format and distribute to potential sponsors 2.3 Seek approval for the sponsorship package prior to promotion where appropriate 2.4 Undertake follow up promotion and negotiation with potential sponsors 2.5 Discuss and negotiate additional opportunities with the sponsor where appropriate 2.6 Make written contracts/agreements with the sponsor to include full details of commitments made by both parties
3 Implement sponsorship activities	3.1 Brief colleagues on details of sponsorship arrangements 3.2 Organise activities in accordance with sponsorship agreement ensuring all agreements made are honoured 3.3 Monitor and evaluate activities and evaluated and make adjustments accordingly 3.4 Provide and request feedback to and from the sponsor 3.5 Take opportunities to enhance value of involvement for sponsors and benefits for the host organisation 3.6 Monitor sponsor payments and other contract formalities throughout the project
4 Follow up with sponsors	4.1 Undertake follow up liaison with the sponsor immediately after the activity, meeting or event 4.2 Record and provide reports and results to the sponsor 4.3 Initiate and make preparations for future joint activities with the sponsor through effective use of interpersonal communication skills

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Items and activities to be sponsored	may include • overall conference sponsorship • physical items (eg satchels) • meals • morning and afternoon teas • travel • entertainment • speaker sessions • social events • ongoing organisation activities (eg an annual publication) • one-off promotional activities or projects
Potential sponsors	may include • individuals • private companies • government agencies • industry organisations/associations • educational institutions
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of developing and implementing sponsorship activities • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ◦ manage the entire sponsorship process for a given meeting/event or activity including identification of potential sponsors/activities to be sponsored, development of the sponsorship package and the implementation of sponsorship activities ◦ demonstrate comprehensive knowledge of practices and protocols in relation to accessing sponsorship opportunities
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ◦ Nil • This unit must be assessed in conjunction with the following unit(s) ◦ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ◦ THTPPD09B Develop conference programs ◦ THHGGA04B Prepare business documents ◦ THHGLE14B Prepare and monitor budgets
Required knowledge and skills	• Required knowledge ◦ Features of typical sponsorship packages created for meetings/events or in other tourism industry contexts ◦ Sponsorship protocols in relation to making contact, nature of proposals, involvement of sponsor in activities and reporting expectations ◦ Potential sponsors for different areas of the market and types of activities • Required skills ◦ Nil
Resource implications	• Physical resources - assessment of this competency requires access to ◦ current technology • Human resources - assessment of this competency will require ◦ involvement of potential and actual sponsors ◦ human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ▪ be competent in this unit ▪ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ▪ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the

	<i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - Assessment must ensure - project or work activities that allow the candidate to plan and implement sponsorship for an organisation, activity or event - adequate timeframes for the activity so that implementation, monitoring and follow up activities can be assessed - involvement of potential and actual sponsors - use of current technology to design effective sponsorship proposals - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons - Assessment methods must be chosen to ensure that the planning and management of sponsorship activities can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit - project to initiate and manage sponsorship activities (best achieved in conjunction with other projects for other units) - case studies to assess knowledge of sponsorship practices and protocols for a range of activities/events - review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	1	3	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Research potential sponsors and developing a strategy to attract sponsorship • Communicating ideas and information - Negotiating sponsorship with potential sponsors • Planning and organising activities - Co-ordinating the involvement of a sponsor in event activities • Working with teams and others - Providing leadership and guidance to team members on working with sponsors • Using mathematical ideas and techniques - Calculating costs of possible sponsorship packages • Solving problems - Liaising and negotiating with a sponsor when attendance numbers at an event fall short of target • Using technology - Using the presentation features of software to prepare effective sponsorship package documentation Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FACILITY MANAGEMENT

Contents

SRXFAC001B Maintain equipment for activities.....	1
SRXFAC002B Maintain sport and recreational facilities	7
SRXFAC003B Implement facility maintenance programs.....	15
SRXFAC004B Plan and provide sport and recreational services	23
SRXFAC005B Coordinate facility and equipment acquisition and maintenance	29
SRXFAC006B Manage and control stock supply and purchase	38
SRXFAC007B Manage the provision of equipment and consumables.....	43
SRXFAC008B Obtain facilities	50
SRXFAC009B Plan, develop and commission facility development	55

SRXFAC001B	MAINTAIN EQUIPMENT FOR ACTIVITIES
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the core skills and knowledge to undertake routine maintenance and minor repairs on sport and recreation equipment.

ELEMENT	PERFORMANCE CRITERIA
1 Perform routine equipment maintenance	1.1 Examine and check equipment according to maintenance schedule 1.2 Check emergency equipment is regularly to be in correct working order
2 Carry out equipment repairs	2.1 Undertake necessary minor repairs to maintain safe and effective use of equipment promptly within one's own area of responsibility in the work environment 2.2 Report repairs which cannot be carried out to the responsible person 2.3 Follow all service and repair procedures as recommended by manufacturers 2.4 Undertake all necessary measures to prevent clients and staff using unsafe equipment 2.5 Examine resources required for equipment maintenance and repair regularly to ensure availability and operational ability 2.6 Ensure working practices are in line with health and safety guidelines
3 Store equipment to maintain a serviceable condition	3.1 Place equipment in correct storage area 3.2 Store and handle equipment so as to avoid damage to itself and the environment 3.3 Store equipment in relation to accessibility and frequency of use 3.4 Maintain storage areas in a clean and tidy condition 3.5 Maintain accurate and up-to-date written records of stored equipment 3.6 Comply with manufacturer's storage requirements with 3.7 Maintain necessary access and egress in the case of an emergency 3.8 Ensure security for storage facility is in accordance with operating procedures
4 Complete documentation	4.1 Complete records of routine maintenance and repairs promptly, accurately, and legibly in accordance with guidelines

Range of Variables

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Damage	[all categories] • damage to fabric and other components • missing parts • components requiring restocking or refilling • failure to operate correctly
Equipment	[all categories] • use of ○ general pieces of equipment used within a recreation activity ○ participant or client specific equipment ○ equipment with significant health and safety implications ○ rescue equipment ○ emergency equipment • types of ○ large items (requiring lifting and assembly) ○ small items ○ fragile items ○ simple and complex equipment
Maintenance	[all categories] • cleaning • lubrication • reinflation • checking for damage • restocking or refilling • repair • storage
Records	[all categories] • format to include ○ date ○ time ○ nature of the fault ○ repairs or maintenance carried out
Repairs	[all categories] • replacement of faulty or missing parts • repair of component parts • repair of structural fabric

	• referral to qualified/experienced repairer
Work environment	[all categories] • indoor and outdoor activities • large and small enterprises • activities within fitness, sport, outdoor recreation and community recreation

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of equipment repair and maintenance procedures within the work environment • Assessment of performance should be over a period of time, maintaining a variety of equipment, covering the prescribed number of categories from the Range Statements that are applicable within the learners work environment in the community recreation, fitness, outdoor recreation or sport industry • Assessment must confirm the ability to apply this knowledge and appropriate techniques to ○ maintain and repair safety, general, and activity - specific equipment used within at least one activity/discipline of the recreation industry ○ carry out equipment repairs within level of responsibility and skill ○ refer equipment repairs and maintenance to the relevant personnel ○ maintain accurate records of repairs and maintenance ○ correctly store equipment
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXCAI003B Provide equipment for activities
Required knowledge and skills	• Required knowledge ○ Reasons for carrying out regular maintenance checks ○ Reasons for keeping accurate reports ○ What to look for when checking equipment serviceability ○ Manufacturer's and organisation's guidelines and codes of practice pertaining to equipment maintenance and repair ○ Who the responsible person is ○ Safety standards for equipment within area of responsibility • Required skills ○ A range of equipment repair techniques within one's area of responsibility relevant to the equipment being maintained ○ Accurate recording of equipment and condition ○ Communications, eg, verbal, non-verbal, instructions, labels
Resource implications	• Physical resources - assessment of this unit of competency requires access to ○ recreation equipment ○ equipment repair and maintenance resources ○ storage areas • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at

	- the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as variations in the types of damage or deterioration of equipment, this unit of competency must be assessed over a period of time, maintaining a variety of equipment, in order to ensure consistency of performance over the Range Statements and contexts applicable to the learner's work environment
Context for assessment	• This unit of competency must be assessed in the context of maintaining equipment for a real sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	-	1	-	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting and analysing information about the condition of equipment based on workplace procedures • Communicating ideas and information - Communicating with clients and staff with regards to the condition of equipment • Planning and organising activities - Planning and organising for the repair of equipment • Working with teams and others - Not applicable • Using mathematical ideas and techniques - Calculating duration and frequency of use of activity-specific equipment that has safety benchmarks • Solving problems - Not applicable • Using technology - Using equipment appropriately for repair and maintenance Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC002B	MAINTAIN SPORT AND RECREATIONAL FACILITIES
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to maintain facilities within a sport and recreation context in accordance with an organisation's policies and procedures.

ELEMENT	PERFORMANCE CRITERIA
1 Inspect, clean and maintain facilities/areas	1.1 Carry out regular inspections to identify potential hazards/problems in the work area according to workplace procedures and standards 1.2 Clean and maintain areas and amenities in the work environment to required standards in accordance with Occupational Health and Safety legislation 1.3 Store and handle chemicals safely according to directions, Occupational Health and Safety (OH&S), health regulations and organisation guidelines 1.4 Dispose of wastes and dangerous chemicals in accordance with Occupational Health and Safety (OH&S), health regulations and organisation guidelines
2 Monitor necessary supplies	2.1 Check supplies regularly for quantity, quality and expiry date 2.2 Order or request supplies in accordance with organisation procedures 2.3 Dispose of supplies according to Occupational Health and Safety (OHS) legislation and organisation regulations
3 Clean facility areas	3.1 Maintain the cleanliness of the facility areas in accordance with the approved guidelines and codes of practice 3.2 Clean areas at the specified times where possible, with cleaning agents which are compatible with their surfaces 3.3 Remove graffiti and chewing gum, as soon as possible, using the correct cleaning agent 3.4 Display notices which warn clients of potentially unsafe areas, resulting from cleaning, clearly and correctly 3.5 Demonstrate use of correct clothing/ equipment /materials and work methods 3.6 Use cleaning agents as specified, using the recommended dosages/solution concentrations and chemicals and demonstrate handling them with care 3.7 Clean cleaning materials, tools and equipment and return to the correct storage location
4 Tidy facility areas	4.1 Remove spillages, breakages and waste promptly and safely to the correct place, with minimum inconvenience to clients and staff 4.2 Maintain lockers, baskets, cubicles and other clothing storage facility areas in a clean and tidy place 4.3 Deal with left belongings according to approved guidelines and codes of practice 4.4 Demonstrate use of correct clothing, equipment and work methods 4.5 Dispose of rubbish is correctly and hygienically
5 Handle cleaning chemicals	5.1 Identified chemicals correctly 5.2 Handle chemicals according to current safety regulations 5.3 Locate and wear correct protective clothing as required 5.4 Deal with any spillages promptly according to current safety regulations

	5.5 Deal with any contamination of the person promptly according to the manufacturer's guidelines and make a full and accurate report 5.6 Report leaking or damaged containers immediately to the responsible authority 5.7 Follow the correct procedures in the event of an emergency threatening the safety of staff or clients
6 Organise cleaning chemicals	6.1 Store chemicals so that the most frequently used are most accessible 6.2 Carry out separation of incompatible chemicals according to manufacturer's guidelines and current regulations 6.3 Store chemicals in the correct area 6.4 Report leaking or damaged containers promptly to the responsible authority 6.5 Monitor levels of chemical stocks as used and inform the responsible person of any possible change 6.6 Check the shelf - life of stock regularly and remove any past the expiry date promptly and dispose of correctly 6.7 Keep accurate records clean and tidy, and pack containers in an orderly manner 6.8 Report defects in the storage area to the responsible person 6.9 Lock storage areas when unattended
7 Ensure the continued operation of coin operated machines	7.1 Check stock levels of machines periodically and restock supplies as required 7.2 Empty coin boxes for coin - operated machines according to schedule, or when reports are made of machines being filled up 7.3 Record machine trip numbers accurately on the specified documentation 7.4 Record machine faults and report promptly to the responsible person, and display notices promptly on machines to inform facility clients 7.5 Clean machines frequently and remove marks, stains, dust and grease promptly 7.6 Carry out minor repairs on the machine when necessary subject to the manufacturer's service agreement
8 Contribute to the administration of the facility	8.1 Accept bookings for the recreational facility and record accurately and in accordance with organisation guidelines 8.2 Inform clients of the requirements and responsibilities of using the recreational facility 8.3 Record bookings in accordance with organisation and legislative requirements accurately and legibly

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Administration	[all categories] • maintenance activities may include but are not limited to ○ booking procedures
Chemicals	[all categories] • types ○ bleach based ○ acid based ○ chemicals used for the purification of water ○ floor seals • handling ○ protective clothing ○ managing incidents such as spillage • storage ○ location ○ maintenance of area ○ monitoring shelf life
Cleaning agents to be used	[all categories] may include • acid/alkaline based chemicals • heavy-duty detergents • organic solvents • abrasives
Facility/area	[all categories] may include • outdoor • indoor • dry and wet recreation centre/facility • built and non-built
General cleaning equipment	[all categories] • manual equipment • mechanical equipment

Guidelines	[all categories] • written safety procedures for the facility • manufacturer's guidelines
Legislative context	[all categories] • State/Territory statutory requirements • local laws, by-laws ordinances and policy
Machines	[all categories] may include • telephones • dispensing machines
Maintenance	[all categories] may include • lawn mowing • edging • tree lopping • maintaining supplies • minor repairs • cleaning facility
Maintenance activities	[all categories] may include • restocking • emptying coins • cleaning • safety inspection
Procedures	[all categories] • written safety/operating standards
Safety regulations	[all categories] • current Occupational Health and Safety Act • current control of hazardous substances • current activity-specific safety regulations
Supplies	[all categories] • may include ○ first aid and sun cream

	○ chemicals ▪ for facility, eg, pool ▪ for cleaning, eg, detergent, wax ○ office supplies ○ hygiene/sanitary products ○ supplies specific to recreation activity or service requirements
Wastes	[all categories] • types may include ○ blood ○ bandages ○ chemicals ○ sanitary bins ○ garbage ○ sharps • handling ○ protective clothing ○ safe disposal ○ guidelines
Work environment	[all categories] • varies with respect to ○ size of the organisation ○ location ○ organisational structure ○ nature of the service provided ○ availability of resources

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the maintenance tasks required within own area of responsibility within a specific facility applicable to the community recreation, outdoor recreation, fitness or sport industries • Assessment of performance should be over a period of time covering the prescribed number of categories from the Range Statements that are applicable in the learner's work environment • Assessment must confirm the ability to apply this knowledge and appropriate techniques to ○ clean and service facility areas ○ use cleaning chemicals compatible to the surfaces being cleaned within the work environment ○ comply with all safety requirements with respect to the use and storage of chemicals and treatment of spills ○ perform maintenance duties without inconveniencing clients ○ maintain adequate stock levels ○ wear correct protective clothing and dispose of wastes in accordance with legislative requirements and organisation's procedures ○ empty coin, stock and maintain machines and notify relevant personnel of faults ○ maintain a facility/area using equipment consistent with level of responsibility
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXOHS001B Follow defined Occupational Health and Safety policies and procedures • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ The main types of cleaning agents and their correct uses ○ Hazards associated with cleaning agents and methods of minimising these ○ Symbols used to identify hazards ○ Treatment procedures for chemical spillage's on the skin and the floor ○ The relevant provisions for the employees under the Health and Safety Act pertaining to the handling of cleaning equipment and chemicals ○ Location of the Health and Safety Act requirements ○ Organisation's codes or practice for dealing with lost belongings and the possible consequences of not following these ○ Correct clothing, equipment and work methods ○ Correct and hygienic methods for disposing of waste ○ Organisation ordering procedures ○ Relevant health and safety legislation

	○ Basic Machinery operation, eg, whipper snipper, lawn mowers, cleaners ○ Types of supplies available and necessary, ie, Occupational Health and Safety regulations • Required skills ○ Communication/interpersonal skills to notify of faults and cleaning schedules ○ Operating basic machinery ○ Identifying hazards/unclean area/pollution ○ Using cleaning materials ○ Gardening and operation of gardening equipment ○ Cleaning techniques ○ Monitoring supplies ○ Writing order/requests ○ Checking expiry dates ○ Organising ○ Disposal of dangerous materials ○ Booking procedures
Resource implications	• Physical resources - assessment of this unit of competency requires access to ○ a real work environment ○ cleaning and maintenance equipment ○ supplies ○ coin operated machines • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues of variations in work environments, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range of Statements and contexts applicable to the work environment at any given time
Context for assessment	• For valid and reliable assessment competency must be demonstrated in a real work facility with clients in the community recreation, outdoor recreation or sport industries • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	-	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information about the facility such as quantities of supplies, cleanliness of areas and organising appropriate maintenance work • Communicating ideas and information - Communicating maintenance tasks that may impact on the safety of clients • Planning and organising activities - Planning and organising facility maintenance • Working with teams and others - Coordinating maintenance work with colleagues and clients in order to minimise disruption to service delivery • Using mathematical ideas and techniques - Stocktaking and ordering of maintenance supplies • Solving problems - Not applicable • Using technology - Using current technology for safe operation of equipment etc Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC003B	IMPLEMENT FACILITY MAINTENANCE PROGRAMS
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to implement a maintenance program for a sport and recreation facility and to contribute to the development of the facility maintenance program.

ELEMENT	PERFORMANCE CRITERIA
1 Contribute to the development of a maintenance program	1.1 Ensure that maintenance program protects health and safety of facility users 1.2 Demonstrate that program accounts for short, medium and long term maintenance requirements of the facility 1.3 Schedule maintenance activities to minimise disruption to facility users 1.4 Integrate maintenance program with asset acquisition and disposal plans 1.5 Demonstrate that maintenance plan protects function and value of asset 1.6 Consider alternative maintenance methods and use to maintain cost effective program
2 Implement a maintenance program	2.1 Maintain facility function without interruption where possible 2.2 Maintain safety for facility users at all times in accordance with organisation and legislative requirements 2.3 Carry out routine maintenance within scheduled timeframes and budgets 2.4 Respond promptly to requests for maintenance assistance 2.5 Report recommendations which contribute to the increased efficiency of maintenance to the responsible person
3 Respond to failed or unsafe equipment	3.1 Erect clear and noticeable warning signs around equipment which is in the process of being repaired 3.2 Carry out the assessment of failed or unsafe equipment in accordance with requirements 3.3 Perform repairs within the learner's designated responsibility and ensure manufacturer's recommendations and standards are complied with 3.4 Withdraw (immediately) from use of unsafe equipment which cannot be effectively repaired within one's own area of responsibility in the work environment 3.5 Record equipment that is seen to have failed and reported promptly to the responsible person 3.6 Complete (promptly, accurately and correctly) reports on repair work which has been undertaken 3.7 Follow guidelines and codes of practice correctly at all times
4 Inspect, clean and maintain facilities	4.1 Carry out regular inspections to identify potential hazards/problems in the work area according to workplace procedures and standards 4.2 Clean and maintain areas and amenities to required standards in accordance with Occupational Health and Safety (OH&S) legislation 4.3 Store and handle chemicals safely according to directions, Occupational Health and Safety (OH&S), health regulations and organisation policy 4.4 Dispose of wastes and dangerous chemicals in accordance with Occupational Health and Safety, health regulations and organisation policy
5 Monitor necessary supplies and records	5.1 Check supplies/stock regularly for quantity, quality and expiry date 5.2 Maintain determined optimum supply/stock levels to ensure constant

	productivity 5.3 Undertake <i>purchase, receipt, storage and issue</i> of supplies in accordance with organisation procedures 5.4 Reconcile supply/stock levels with paperwork and rectify or report any discrepancies to nominated person within designated timelines 5.5 Update <i>records</i> in an accurate manner to ensure confidentiality and security of information and keep records for the necessary period 5.6 Dispose of expired or damaged <i>supplies/stock</i> according to Occupational Health and Safety (OH&S) legislation and organisation regulations
6 Monitor function and value of assets	6.1 Obtain research and feedback from facility users on effectiveness of maintenance program 6.2 Check condition of <i>asset</i> regularly against criteria that ensure retention of function and value 6.3 Respond to identified problems promptly in accordance with organisation procedures 6.4 Value <i>supplies/stock</i> using the nominated valuation method (if required)

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Asset	[all categories] • types may include ○ facility ○ program ○ human resources • function • value
Equipment	[all categories] • large items of equipment • small items of equipment • simple equipment • complex equipment • equipment with significant health and safety implications
Facility	[all categories] • may include ○ buildings ▪ single ▪ multi purpose ○ built environment ○ non-built environment ○ plant, eg, fixtures, infrastructure, superstructure
Facility users	[all categories] • types ○ clients ○ supporters ○ sponsors ○ members ○ volunteers ○ teams ○ clubs ○ resource owners/managers
Guidelines	[all categories] • written safety operating standards

Legislation and Industry codes	[all categories] • may include ○ Occupational Health and Safety (OH&S) ○ building codes and regulations ○ fire regulations ○ health act ○ industrial relations ○ environment legislation ○ Equal Employment Opportunity ○ anti-discrimination legislation ○ local government regulations ○ Australian Taxation Office (ATO) regulations
Maintenance	[all categories] • objects of maintenance may include ○ capital items ○ fittings and fixtures ○ equipment ○ premises ○ plant ○ motor vehicles ○ environment • short, medium, long term plans • budget
Maintenance activities	[all categories] • asset valuation and assessment • routine property maintenance, for example, ○ lawn mowing and edging • maintaining stocks and supplies, for example, ○ office requirements • maintenance and minor repairs to ○ equipment ○ facility/building ○ surroundings/grounds
Purchase, receipt, storage and issue	[all categories] • documents may include ○ purchase requisitions ○ purchase orders ○ delivery dockets ○ invoices ○ credit notes ○ inventory cards
Records	[all categories] • may include ○ paper-based ○ electronic

	○ organisation accounting system
Supplies/stock	[all categories] • types that may include ○ first aid ○ chemicals for pool ○ office supplies, eg, stationery ○ hygiene and sanitary supplies ○ cleaning supplies, eg, detergent, wax ○ equipment for activity-specific areas • monitor and assess • record
Wastes	[all categories] • types that may include ○ blood ○ bandages ○ chemicals ○ sanitary bins ○ garbage ○ sharps • safe disposal • safe handling
Work environment	[all categories] • varies with respect to ○ size of the organisation ○ location ○ organisational structure ○ nature of services provided ○ availability of resources, eg, human, financial, physical

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of maintaining equipment and facilities in the work environment as well as contributing to the development of a maintenance program • Assessment of performance should be over a period of time covering all categories of facility maintenance from the Range Statements that are applicable in the learners environment • Assessment must confirm the ability to apply this knowledge and appropriate techniques to ○ schedule and implement short and long term maintenance programs for facilities and equipment ○ respond appropriately to equipment failures ○ implement maintenance program within budget, scheduled timeframes and without inconveniencing clients ○ inspect the cleanliness and safety of facilities to ensure their compliance with standards ○ maintain supplies/stock levels to ensure the smooth running of the organisation within area of responsibility ○ maintain accurate records and deal with discrepancies ○ account for supplies/stock
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXFAC001B Maintain equipment for activities ○ SRXFAC002B Maintain sport and recreational facilities • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Equipment operation ○ Chemical and hazardous substances ○ Ordering procedures ○ Occupational Health and Safety (OH&S), Health and other regulations ○ Garden machinery operation, eg, whipper snipper, lawn mowers, and basic gardening techniques ○ Standard of cleaning required ○ Types of supplies available and necessary, eg, Occupational Health and Safety (OH&S) regulations/first aid ○ Current procedures for disposal of hazardous materials, eg, syringes, chemicals ○ Purchasing and receipting procedures within the organisation ○ Activity-specific related knowledge ○ Principles of supply and demand • Required skills ○ Time management ○ Servicing and repairing equipment ○ Communication/interpersonal skills ○ Identifying hazards/unclean area/pollution

	○ Maintenance activities ▪ Using cleaning materials ▪ Gardening ▪ Operation of gardening equipment ▪ Cleaning techniques ○ Monitoring supplies ○ Ordering supplies ○ Writing orders/requests ○ Checking expiry dates ○ Organising ○ Disposal of dangerous materials
Resource implications	• Physical resources - assessment of this unit of competency requires access to ○ a real work environment with maintenance requirements ○ a comprehensive range of general equipment and supplies ○ associated resources and information on equipment, safety regulations etc • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as variations to the demands of a work environment, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to developing and implementing a facility maintenance schedule
Context for assessment	• For valid and reliable assessment this unit of competency must be assessed in the context of a real work environment in sport, outdoor recreation or community recreation sectors • Assessment of this unit of competency will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	1	2	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting and analysing a range of information related to overall functioning of a facility • Communicating ideas and information - Informing colleagues and clients about any changes to the function of the facility due to maintenance schedules or safety requirements • Planning and organising activities - Planning and implementing a range of maintenance schedules and activities • Working with teams and others - Planning and communicating with others participating in the maintenance activities • Using mathematical ideas and techniques - Calculating existing levels of stock and estimating future needs • Solving problems - Ensuring optimal functioning of the facility by minimising disruption due to things such as equipment failure • Using technology - Using up to date equipment in the implementation of maintenance activities Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC004B	PLAN AND PROVIDE SPORT AND RECREATIONAL SERVICES
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to determine the services required by clients and to plan, implement and evaluate the services, from a facility management perspective.

ELEMENT	PERFORMANCE CRITERIA
1 Establish need for the recreation service at a facility	1.1 Undertake research to establish needs, and identify target groups 1.2 Determine the composition and nature of the services which will address the identified needs 1.3 Gain necessary approvals 1.4 Make recommendations to the appropriate person/s
2 Plan the service	2.1 Establish objectives and evaluation procedures 2.2 Establish work plans and administration procedures 2.3 Identify resources necessary for the service, determine a promotional plan and establish a budget 2.4 Determine service content and design and gain industry standards and necessary approvals 2.5 Undertake risk audit 2.6 Take into account the cultural, linguistic and special needs of the target group 2.7 Identify relevant legislation
3 Implement the service	3.1 Obtain and allocate necessary resources 3.2 Implement work plan, administration procedures and promotional strategy 3.3 Monitor, review and modify or cancel service if necessary to meet new circumstances 3.4 Conduct service safely to meet stated outcomes and objectives 3.5 Follow Occupational Health and Safety (OH&S) and organisation's emergency procedures and industry standards
4 Evaluate the service	4.1 Seek feedback on the service 4.2 Identify outcomes and assess against objectives 4.3 Develop recommendations on future services , record and report to the appropriate person in the work environment

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Administration procedures	[two categories] • registration • receipting • ticketing • confirmation of bookings
Budget	[all categories] • setting fees
Facility	[one category] • buildings ○ single ○ multi-purpose • built structures, eg, tracks and walkways • plant ○ fixtures ○ infrastructures ○ superstructure
Feedback	[three categories] may be qualitative and quantitative • evaluation forms • asking people • numbers • surveys • complaints • reaction • feedback from staff • financial information
Legislation	[all categories] • state/territory statutory requirements • local laws, by-laws, ordinances and policy
New circumstances	[all relevant categories] • numbers

	• weather • facility booking falling through • equipment failure • people not arriving • emergencies
Services	[one category] • major events • educational programs • group programs/services • an individual program/service • overall program • Occupational Health and Safety (OH&S) program • term program
Resources	[all categories] • staff • equipment • venues • paperwork
Target group	[one category] • may include ○ non-English speaking background ○ age specific ○ disability specific ○ aboriginal ○ regular clients ○ new clients ○ gender specific ○ specific ethnic origin
Work environment	[all categories] • varies with respect to ○ size of the organisation ○ location ○ organisational structure ○ nature of the service(s) provided ○ availability of resources and technology
Work plan	[all relevant categories] • timeframes • promotional plan • roles and responsibilities • permits, approvals and/or permission • renovations and refurbishing

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the service requirements of the organisation and its clients • Assessment of performance should be over a period of time covering all categories of administration, new circumstances and resources and any categories from the remaining Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ determine the nature of services that the organisation could provide in response to client needs ○ recommend the introduction of new services ○ plan services to meet identified client needs ○ implement the introduction of a service ○ monitor, review and evaluate the service ○ make and record recommendations on future services
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXGCSO04A Meet client needs and expectations • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with other units ○ SRXCAI006B Organise a sport and recreation program ○ SRXCAI007B Conduct a sport and recreation program
Required knowledge and skills	• Required knowledge ○ Organisation policies and procedures ○ Organisation objectives ○ Resource allocation ○ Insurance policy/arrangements ○ Occupational Health and Safety (OH&S) legislation relevant to the provision of recreation services ○ Organisation emergency policy procedures ○ Community relations • Required skills ○ Ability to use computers ○ Research skills ○ Planning and coordination of services ○ Monitoring, reviewing and modifying services
Resource implications	• Physical resources - assessment of this competency requires access to ○ a work environment in order to identify the need for and plan and provide a recreational service • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the

	○ relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with a variety of client and services, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to planning and providing sport and recreational services
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity with a range of real clients. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding target groups • Communicating ideas and information - Reporting on evaluation of service to clients • Planning and organising activities - Planning the composition and nature of the services which will address the identified needs • Working with teams and others - Interviewing staff for feedback • Using mathematical ideas and techniques - Collating number of feedback responses • Solving problems - Dealing with complaints from customers • Using technology - Using a computer to construct a survey form Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC005B	COORDINATE FACILITY AND EQUIPMENT ACQUISITION AND MAINTENANCE
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the knowledge and skills to coordinate equipment selection, use and maintenance and to produce maintenance plans for a facility. It does not include specialist skills but focuses on the need for mainstream managers to pro-actively plan for and manage the acquisition and maintenance of physical assets.

ELEMENT	PERFORMANCE CRITERIA
1 Establish maintenance systems	1.1 Establish systems to ensure that the condition and performance of equipment and facilities are regularly reported and discussed within the organisation 1.2 Identify areas/items prone to defects, demonstrating frailty, or scheduled for regular maintenance, and use information to develop a long-term maintenance plan 1.3 Inform individuals in the organisation who are responsible for performing regular or scheduled maintenance duties of the details of the plan 1.4 Identify organisations and/or individuals suitably qualified to offer maintenance repair, and store contact numbers for easy access 1.5 Identify data to be included in the reports on repair work 1.6 Develop systems to ensure that urgent/non-routine maintenance jobs are reported to the appropriate authority as soon as problems are found
2 Research and plan for facility and equipment maintenance	2.1 Identify work requirements and clarify/confirm with appropriate parties or by site inspection 2.2 Identify, apply and monitor relevant codes and standards , apply and monitor throughout the work procedure 2.3 Identify, obtain and inspect resources and service providers required to satisfy the work plan for compliance with the job specifications 2.4 Select and interpret relevant plans, drawings and text in accordance with the work plan 2.5 Plan maintenance in detail including sequencing, prioritising and considerations made where appropriate for the maintenance of safety, security and capacity in accordance with system/site/organisation requirements and reference information 2.6 Resolve coordination requirements, including requests for isolations where appropriate, with others involved, affected or required by the work 2.7 Identify potential hazards and select prevention and/or control measures 2.8 Address equipment and facility maintenance history, condition monitoring information, recent modifications and existing status in defining work scope 2.9 Undertake costings of work and assess impact on budget 2.10 Identify needs for operational testing and/or recommissioning
3 Develop maintenance plan	3.1 Schedule work scope into a plan in accordance with established criteria and demonstrate the sequence and emphasis in maintenance plan are in accordance with organisational procedures 3.2 Ensure that work schedules are realistic in their expectations of the frequency with which maintenance checks are to be performed and contain the required information to allow efficient operation of maintenance checks 3.3 Document isolation and access requests in accordance with organisation

	requirements 3.4 Develop plans in conjunction with other affected groups in accordance with organisation requirements 3.5 Confirm availability of resources and document in accordance with organisation requirements 3.6 Attach relevant information to work activities to maintenance plan in accordance with organisation requirements 3.7 Document maintenance plans and associated information and distribute through communication channels to all affected staff in accordance with organisation communication systems 3.8 Draft maintenance methods in accordance with criteria developed in research 3.9 Format maintenance methods in a legible, accurate and accessible document in accordance with organisation requirements 3.10 Demonstrate recording systems that are uncomplicated, clear and suited to the organisation's needs 3.11 Present methods for review to relevant staff in accordance with organisation requirements
4 Implement and monitor maintenance plan	4.1 Allocate maintenance information to appropriate staff 4.2 Seek feedback on application/progress of maintenance methods and plans and modify maintenance methods/plans to reflect feedback obtained 4.3 Review/approve modification of method/plan is by relevant staff 4.4 Distribute amended/updated documentation to relevant staff in accordance with organisation communication system 4.5 Preparation and implementation of strategies are achieved using the services of maintenance and planning staff both within and beyond the authority of this work
5 Monitor on-site maintenance contracts and contractors	5.1 Observe the workings of the maintenance contractors constantly 5.2 Ensure the work is in accordance with the requirements of the contract 5.3 Ensure the work of the contractors is scheduled in line with operation of the service
6 Supervise the storage of equipment	6.1 Establish reorder levels and, where adequate levels cannot be sustained, inform colleagues and co-workers promptly 6.2 Establish procedures to ensure that equipment and store materials under conditions recommended by the manufacturer and maintain security 6.3 Establish systems for recording the quantity and condition of stored equipment in an accurate and up-to-date manner
7 Contribute to the selection of equipment and facilities	7.1 Ensure suggested new equipment and/or facilities meet the current or future needs of service provision 7.2 Base suggestions on investigating a range of information sources 7.3 Encourage members of staff within the learner's area of responsibility to contribute recommendations 7.4 Make recommendations clearly and accurately in the required format to the appropriate person in the organisation 7.5 Demonstrate recommendations that state clearly the benefits which can be expected from the suggested new equipment and/or facilities

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Budget	[all categories] • cost of labour • materials • training • services • tools and equipment
Colleagues	[all categories] • those working in the same organisation • line manager
Communication channels	[all categories] • verbal • written memorandums
Communication systems	[three categories] • site meetings • computers ○ personal computer ○ mainframe • manuals • drawings • logs
Co-workers	[one category] • volunteers • workers in other organisations for whom the learner has resourcing responsibility
Data	[all categories] • date • time • nature of fault/repair • repairs carried out

Documentation	[all categories] • job cards • check sheets • safety rule procedures • plant records • drawings • Quality Assurance documentation • maintenance procedures and outage reports
Documents	[all categories] • maintenance plans • scheduling documents • budgets • reports • submissions
Equipment	[three categories] • large items of equipment • small items of equipment • simple equipment • complex equipment • equipment with significant health and safety implications
Facility	[one category] • buildings ○ single ○ multi purpose • built structures, eg, tracks and walkways • plant ○ fixtures ○ infrastructure ○ superstructure
Information sources	[two categories] • trade journals • exhibitions • work of other organisations • sales information • client feedback
Maintenance	[one category] • structural modifications to building • internal or external painting of facility, buildings or structures • resurfacing/returfing • major cleaning procedures • facility repairs, eg, electrical, plumbing, structural

	• equipment cleaning, servicing and repair
Recommendations	[all categories] • written reports • verbal briefings
Recording systems	[one category] • computer records • form books • index file
Reference information	[two categories] • benchmarking reports • maintenance data • market requirements • budgets • business plans
Relevant codes and standards	[all relevant categories] • Occupational Health and Safety (OH&S) standards • statutory requirements • relevant Australian standards • codes of practice • manufacturers' specifications • environmental requirements • enterprise procedures
Resources	[all categories] • all service providers • materials • equipment • tools • finances
Service providers	[one category] • internal staff • external specialists • contractors
System	[two categories] • a plan allocating, reporting and recording the routine and non-routine maintenance of the components of a facility, including ○ plant ○ equipment

	○ fixtures and fittings ○ grounds
Work schedules	[all categories] include information on • days • times • frequency of checks • staff allocation

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of statutory requirements for facility maintenance within an organisation in the sport and recreation industry • Assessment of performance should be over a period of time covering all categories of maintenance and all corresponding categories of the remaining Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ develop and implement a maintenance plan for significant work on a facility ○ plan maintenance schedules for a diverse range of equipment ○ establish systems for the storage of equipment ○ respond appropriately to equipment failures ○ provide suitable input into the selection of new equipment ○ supervise service contractors ○ negotiate work activities with all relevant personnel ○ modify maintenance plans based on feedback ○ accurately document all aspects of plan
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXRES003B Contribute to the planning, monitoring and control of resources • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Relevant statutory requirements and codes of practice relating to facility construction and construction sites ○ Environmental standards and requirements ○ Safety standards of equipment and range of repair techniques relevant to the equipment being maintained ○ Organisational procedure for reporting faulty equipment ○ Recording/reporting procedures and requirements within the organisation ○ Occupational Health and Safety (OH&S) standards, guidelines and codes of practice pertaining to reporting of unsafe equipment, recording of equipment repair and the repair and maintenance of facilities and equipment ○ Methods of monitoring work of contractors and contract requirements when outsourcing repairs ○ Schedule of facility operation which the contractors work should fall in line with ○ Reorder levels for consumables ○ Procedures for judging whether materials and equipment are fit for use and maintenance requirements and frequency of checks for the equipment ○ Methods of equipment disposal

	○ Routine and non - routine schedules for maintenance ○ Requirements within maintenance schedules and considerations when planning and timetabling a cleaning and maintenance schedule ○ Communication channels within organisations ○ Methods to determine current and future equipment needs and information sources which may be used ● Required skills ○ Application of Occupational Health and Safety (OH&S) standards, statutory requirements, codes of practice and environmental requirements ○ Development of implementation plans ○ Report writing ○ Prioritising work
Resource implications	● Physical resources - assessment of this competency requires access to ○ a work environment with a facility requiring maintenance ● Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	● Due to issues such as the diversity of the items around a facility that require maintenance, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to coordinating facility and equipment acquisition and maintenance
Context for assessment	● This unit of competency must be assessed in the context of a sport or recreation organisation. For valid and reliable assessment the sport or recreation organisation should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace ● Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes ● Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	3	2	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting maintenance information on the equipment at the facility • Communicating ideas and information - Informing individuals in the organisation who are responsible for performing regular or scheduled maintenance duties of the details of the plan • Planning and organising activities - Planning maintenance sequencing • Working with teams and others - Working with specialist contractors • Using mathematical ideas and techniques - Calculating budgets for maintenance • Solving problems - Dealing with non-routine maintenance requirements • Using technology - Using a database to monitor assets Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC006B	MANAGE AND CONTROL STOCK SUPPLY AND PURCHASE
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the knowledge and skill required to establish stock control and stock purchasing systems within a sport and recreation facility or context.

ELEMENT	PERFORMANCE CRITERIA
1 Establish and implement an order and supply process	1.1 Establish and implement an order and supply process in the workplace 1.2 Establish economic order quantities based on internal information and supplier advice 1.3 Take situations creating extra demand into consideration, ie, peak times, new staff, advertising and monitor current usage of stock for wastage 1.4 Determine stock levels according to peak seasons, special events and supplier's lead time 1.5 Develop process to include monitoring of quality during supply and delivery processes
2 Establish and implement stock control systems	2.1 Develop stock control systems and communicate to all appropriate persons within the organisation 2.2 Apply special control systems to items showing high wastage or loss 2.3 Apply a range of data to calculate standard methods and measures and communicate these to appropriate persons within the organisation 2.4 Monitor systems within the workplace and make adjustments according to feedback and operational experience 2.5 Train staff to minimise stock wastage 2.6 Implement and maintain systems to prevent theft
3 Develop optimum supply arrangements	3.1 Evaluate quality of supply based on feedback from colleagues and clients 3.2 Source potential suppliers and review against the organisation's requirements 3.3 Develop purchase specifications and obtain quotes from different suppliers as required 3.4 Assess suppliers against specifications and select best options and approval given to designated person 3.5 Obtain all required information, check and verify for efficient ordering and make purchases within budget allocations 3.6 Order new product/supplies, if appropriate, following an established pattern of demand 3.7 Monitor performance of suppliers and amend sources of supply in accordance with assessment
4 Manage stock take/reconciliation of actual stock levels with records	4.1 Plan stock take/reconciliation to designated timelines 4.2 Follow appropriate counting procedures and establish checks to ensure accuracy 4.3 Use an auditor if necessary 4.4 Complete all paperwork accurately and within legislative requirements and monitor maintenance of records to ensure that records are stored for requisite amount of time

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Data	[all categories] for establishing stock control system • yield tests • historical sales figures • stock take figures
Legislative requirements	[all categories] • Australian Taxation Office (ATO) regulations
Recording mechanism/systems	[one category] • paper based • electronic
Stock	[two categories] • food and beverages • office supplies and stationery • equipment • cleaning agents and chemicals • maintenance supplies • general stores
Stock control systems	[two categories] • integrated point of sale systems • imprest • ledgers • bin cards • stock taking systems • stock valuation systems • stock reporting systems

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of processes to develop purchasing and control systems in the workplace • Assessment of performance should be over a period of time covering all categories of stock and stock control systems from the Range Statements that are applicable in the learners environment • In particular, assessment must confirm the ability to ○ ensure that the system operates smoothly ○ ensure that stock requirements are estimated correctly according to organisation needs ○ have an understanding of allowing for contingencies when ordering stock ○ ensure stock take occurs according to set timelines ○ ensure records are completed and stored according to organisation needs ○ ensure the stock is secure
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXRES003B Contribute to the planning, monitoring and control of resources • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXRES005B Achieve an efficient use of resources
Required knowledge and skills	• Required knowledge ○ Methods of stock valuation ○ Methods of yield testing ○ Suppliers and the market ○ Methods to accurately assess current and future needs • Required skills ○ Planning for current and future needs and contingencies
Resource implications	• Physical resources - assessment of this competency requires access to ○ a real work environment • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>

Consistency in performance	• Due to issues such as monitoring and managing stock at differing demand phases, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to manage and control stock supply and purchase
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation organisation. For valid and reliable assessment the sport or recreation organisation should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a number of locations, any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	1	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding peak usage times • Communicating ideas and information - Instructing new staff on stock control system • Planning and organising activities - Planning stock take to designated timelines • Working with teams and others - Working with suppliers to establish lead-in times • Using mathematical ideas and techniques - Counting items during a stock take • Solving problems - Sourcing new suppliers after monitoring performance of suppliers • Using technology - Using a spreadsheet application to monitor stock Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC007B	MANAGE THE PROVISION OF EQUIPMENT AND CONSUMABLES
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to develop and oversee processes for the identification, selection, maintenance and provision of equipment and consumables.

ELEMENT	PERFORMANCE CRITERIA
1 Identify equipment and consumables needs	1.1 Compile a current asset register/equipment inventory 1.2 Assess operational and development plans and establish future need for equipment and consumables based on accurate, up-to-date information on services provided and plan as part of future developments 1.3 Identify budgetary limitations 1.4 Identify particular functions of desired equipment and consumables and establish financial outlay 1.5 Develop cost/benefit analysis to reflect established findings 1.6 Encourage colleagues and other co-workers to contribute suggestions and confirm equipment needs
2 Select equipment and consumables	2.1 Present, where necessary, needs analysis to designated person for approval 2.2 Monitor retail market and conduct negotiations for purchase of equipment and consumables 2.3 Obtain quotes equalling the number predetermined by the organisation's policies and procedures 2.4 Select equipment and consumables to correspond to identified needs and comply with relevant legislation , health and safety requirements, the organisation's policy and recognised good practice 2.5 Ensure equipment and consumables meet reasonable criteria for durability, after-sales service, maintenance schedules and costs and correspond to current good practice within the limitations of available budget 2.6 Demonstrate that chosen equipment and consumables can be purchased, stored and maintained within the available budget, or, if necessary, a well researched and presented case is made for additional funds 2.7 Consult with competent organisations to establish the safety record of equipment for which the organisation has no experience or knowledge 2.8 Consult, where possible, colleagues and co-workers over the selection of equipment and consumables
3 Obtain equipment and consumables	3.1 Document the process of securing preferred suppliers and identify procedures for maintaining relationships with supplier representatives 3.2 Obtain equipment and consumables from the most cost effective supplier without compromising quality and obtain promptly so that service delivery is not interrupted 3.3 Inform colleagues and others promptly of any difficulties in supply 3.4 Purchase equipment and consumables within available budgets 3.5 Follow approved procedures for the purchase and obtaining of equipment and consumables and complete and file documents associated with the purchase and delivery correctly 3.6 Ensure payment for equipment and consumables is prompt and within the conditions of purchase 3.7 Check received equipment and materials carefully for damage and correct

	function and to match with the description on advice notes 3.8 Take correct action in cases where supplied equipment and consumables do not meet specifications
4 Manage the storage and use of equipment	4.1 Ensure adequate insurance exists for equipment specified by the organisation's guidelines and establish procedures to ensure that manufacturer's instructions and insurance conditions are followed 4.2 Establish systems to maintain stocks of equipment and consumables at a level which can support regular service provision 4.3 Ensure records of equipment and consumables are correct and up-to-date and develop and maintain an asset replacement/service schedule 4.4 Follow, where necessary, the correct procedures to obtain additional funding for the maintenance, storage and insurance of equipment 4.5 Test items subject to regular function or safety testing at the required interval using approved methods and record the results accurately 4.6 Establish and monitor systems to ensure that materials with expired life span are withdrawn and correctly disposed of and retire equipment which is hazardous, and repair faulty equipment to manufacturer's specifications
5 Coordinate the provision of equipment	5.1 Inform colleagues and co-workers of equipment which is available 5.2 Establish procedures for the allocation of equipment to individuals and organisations according to the organisation's policies and priorities and define conditions for the use and return of equipment 5.3 Develop guidelines for the checking in and out of equipment, collection of fees, conduct of briefings on equipment use, and checking for serviceability 5.4 Establish procedures for the retrieval of equipment overdue for return, where required 5.5 Monitor and evaluate the frequency of use of equipment and feedback from users is to assist in the review of procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Colleagues	[all categories] those working in the same organisation
Conditions for use and return	[all categories] - should cover - conditions for use - maintenance - labelling - secure storage
Cost/benefit analysis	[all categories] - cost - initial outlay - lease - hire purchase - allocated provisions - benefits - increased participation - depreciation - tax deductibility - increased staff morale - increased productivity - life of existing equipment lengthened
Co-workers	[one category] - may include - volunteers - workers in other organisation for whom the learner had resourcing responsibility
Designated person	[one category] - may include - Board of Management - Chief executive Officer - Finance Manager - Maintenance Manager
Equipment	[one category]

	• large items of equipment • small items of equipment
Equipment and consumables needs	[all categories] • type or equipment • quantity of equipment • intended use • quality
Future need for equipment	[four categories] • growth of organisation • age of current equipment • diversity of activities/services/programs • new activities/services/programs • maintenance program of equipment • depreciation schedule • statutory regulations/codes
Procedures for maintaining relationships	[two categories] • may include ○ visits by sales representatives welcomed ○ attendance at product launches/trade shows ○ name added to mailing lists for promotional material
Records	[all categories] • should cover equipment which is ○ damaged ○ missing ○ on loan
Relevant legislation	[all categories] • state/territory statutory requirements • local laws, by-laws, ordinances and policy • commercial law specifically in the area of contracts and consumer protection • Occupational Health and Safety (OH&S) legislation • taxation law, eg, sales tax
Specifications	[all categories] • types of equipment • quantity of equipment • quality • environmental impact

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of the factors affecting the purchase and provision of equipment and consumables in the work environment and of the establishment of procedures to ensure that this is achieved effectively and efficiently - Assessment of performance should be over a period of time covering all categories of equipment and all other categories from the Range Statements that are applicable in the learners work environment - In particular, assessment must confirm the ability to - assess the organisation's current and future needs for equipment and consumables - budget for the acquisition of required equipment and consumables - research the market to establish the best equipment available for the least financial outlay - develop and maintain relationships with manufacturers and suppliers - establish procedures for the maintenance of equipment - establish procedures and guidelines for the use of equipment and hiring of equipment, where appropriate - consult with colleagues and co-workers
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - BSBCMN408A Report on financial activity - SRXFAC005B Coordinate facility and equipment acquisition and maintenance - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBMGT504A Manage budgets and financial plans
Required knowledge and skills	- Required knowledge - Services provided within the organisation and future development plans - Organisation's policies and procedures for obtaining quotes for the purchase of equipment and consumables - Organisation's objectives, purpose, prime functions and key departments/divisions - Sales and marketing principles and practices and selling techniques of sales persons - Legal issues that affect the purchase of equipment and the entering into of hire purchase contracts - Consumer laws and regulations pertaining to after sales service - Sales Tax legislation - Sources of information on current good practice for equipment maintenance, and criteria for durability - Manufacturer's recommendations and the organisation's insurance conditions for the maintenance and storage of equipment used - Overview of financing options for asset acquisition - Required skills - Negotiation skills in order to negotiate at all levels including with

	employees, management, external consultants, manufacturer and suppliers, government departments ○ Planning and evaluation skills to determine the best possible equipment for the organisation's current and future needs and to evaluate performance of equipment against needs and manufacturer's information ○ Problem solving skills to overcome impediments to achieving desired equipment levels due to budgetary restraints ○ Data collection and analysis skills to gather and assess current and future needs ○ Literacy and numeracy skills in regard to the preparation, analysis, evaluation and reporting of forecast, trends and recommendations and general business correspondence
Resource implications	• Physical resources - assessment of this competency requires access to ○ documentation on a range of equipment and consumables available for purchase ○ information on the organisation's services and needs • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as obtaining items of differing value and importance, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to managing the provision of equipment and consumables
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation organisation. For valid and reliable assessment the sport or recreation organisation should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	2	2	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information regarding equipment in order to establish an asset register • Communicating ideas and information - Presenting a needs analysis to designated person for approval • Planning and organising activities - Planning when equipment should be replaced • Working with teams and others - Liaising with suppliers to obtain quotes to required specifications • Using mathematical ideas and techniques - Calculating depreciation on items of equipment • Solving problems - Taking action in cases where supplied equipment do not meet specifications • Using technology - Using a spreadsheet to create an asset register Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC008B	OBTAIN FACILITIES
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to identify facility requirements and to negotiate facility use based on requirements.

ELEMENT	PERFORMANCE CRITERIA
1 Identify facilities for activity use	1.1 Select a facility after considering a range of potential facilities 1.2 Demonstrate that the identified facility can be made suitable for the chosen purpose through the most efficient use of resources 1.3 Establish that the use of the facility for the chosen purpose will not cause any long-term damage 1.4 Establish the current ownership, conditions and any fee for use 1.5 Bring the chosen facility up to nationally approved health and safety standards and other relevant guidelines, ordinances and codes through the most cost effective use of resources 1.6 Access to the facility is appropriate to the clients who will use it 1.7 Establish records of suitable facilities and communicate to any colleagues who may wish to make use of them
2 Negotiate the use of facilities	2.1 Conduct enquiries and negotiations in a manner which encourages good working relationships 2.2 Give consideration in negotiations for local residents and other users of the facility 2.3 Clarify the use of the facility , the activities involved and any potential benefits to the owners 2.4 Ensure agreements detail any responsibilities for the upkeep, services and security of the facility 2.5 Demonstrate that agreements are satisfactory to all parties and in line with approved policy 2.6 Complete records of agreements accurately and store for future availability 2.7 Communicate agreements clearly and accurately to personnel who may use the facility

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Activity use	[one category] • short-term • long-term
Facilities	[one category] • indoor • outdoor • in the locality • outside the local area • for activities • for accommodation • for storage
Negotiations	[all categories] • are carried out through ○ correspondence ○ meetings

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of the range of facility requirements within the learner's work environment and the procedures to assess the suitability of facilities - Assessment of performance should be over a period of time covering all categories of facility applicable in the learners work environment to suit both short and long-term use - In particular, assessment must confirm the ability to - identify facilities to suit purpose - confirm that the facility meets requirements, health and safety standards, client needs and budget - negotiate facility use and document agreements/contract conditions - acquire the facility in a cost effective manner - keep accurate records of available facilities
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following units - Other units from the Resource Management field within the National Sport and Recreation Industry Competency Standards
Required knowledge and skills	- Required knowledge - Range of potential facilities available - Methods by which the potential facility can be equipped for the purpose and the standard required - Contractual obligations and current practice for hiring/leasing facilities - Relevant health and safety legislation and guidelines - Industrial relations acts, insurance laws, local government by-laws and by-laws of relevant associations (state, national and international) - Likely needs and concerns of local residents and users of the facility - Benefits to owners of the proposed use for facility - Procedures and relevant legislation covering the hiring of facilities - Recording procedures to meet organisational requirements - Consequences of not keeping accurate records of negotiated terms of facility use - Communication systems within organisation to inform personnel of the terms of agreement for facility use - Required skills - Communication and negotiation skills to deal with difficulties and areas of conflict in carrying out negotiations to acquire facilities
Resource implications	- Physical resources - assessment of this competency requires the learner to - have access to a real work environment with facility requirements

	- Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit but preferably be competent in the unit at the level above - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	This unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to identifying facility requirements and negotiating facility use based on requirements
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation facility. For valid and reliable assessment the sport or recreation facility should closely replicate those encountered in the work environment. The facility should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace - Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	1	2	1	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting information about potential clients and the requirements of a facility to meet these • Communicating ideas and information - Negotiating with clients, local residents and management regarding the facility • Planning and organising activities - Planning the fees for use of the facility • Working with teams and others - Working with others in negotiations regarding the facility • Using mathematical ideas and techniques - Using figures to determine capacity of facility and to compare against other potential facilities • Solving problems - Dealing with concerns from local residents • Using technology - Using the Internet to locate and book facilities Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAC009B	PLAN, DEVELOP AND COMMISSION FACILITY DEVELOPMENT
FAC	Facility management

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit covers the knowledge and skills to establish the need and requirements for facility development and to plan and facilitate that development.

ELEMENT	PERFORMANCE CRITERIA
1 Commission improvements to a facility	1.1 Gather information and data from the monitoring of operations to indicate the need for an increase or decrease in specific facility areas 1.2 Make recommendations for development of facilities and equipment to the appropriate person in a form suitable to their needs and response and within the specified time 1.3 Analyse and evaluate the disruptions to the service in carrying out improvements and take measures to minimise inconvenience 1.4 Ensure planned improvements bring the facility up to a standard suitable for its purpose and all relevant health and safety requirements
2 Establish the need for a new facility	2.1 Identify user groups and collect background information on their needs 2.2 Establish user groups requirements for the facility using consultation mechanisms 2.3 Consider service trends and developments and identify current or predicted obstacles and resources for the new facility 2.4 Undertake negotiations with and between user groups and other levels of government to establish priorities for the physical requirements of the facility 2.5 Record all relevant information and keep up-to-date 2.6 Compare the results of the needs analysis with the aims, objectives, values and work environment required by the organisation to determine consistency 2.7 Determine initial siting of the facility based on outcomes of the negotiations and estimate and propose the budget for the new facility
3 Prepare a plan of the facility	3.1 Make decisions on the process to be followed for developing the facility 3.2 Undertake negotiations with relevant bodies regarding the acquisition of resources 3.3 Develop a financial plan for the facility taking into account financial constraints of user groups 3.4 Seek funds for the facility (if necessary) 3.5 Review initial requirements in light of the available funds and resources 3.6 Identify and prepare requirements for tender and brief as required
4 Negotiate a design brief	4.1 Base the brief on an analysis of need, constraints, available resources and policy 4.2 Ensure that the brief identifies the optimum location for the facility , completion date and the purposes for which it will be used 4.3 Demonstrate how the brief itemises all necessary requirements for the user group 4.4 Ensure that the brief itemises any aspects of health and safety which will have to be addressed 4.5 Demonstrate how the brief can be realised within available budgets and is acceptable to all interested parties

	4.6 Carry out negotiations with sensitivity and in a way likely to maintain the goodwill of all those involved while obtaining value for money for the organisation
5 Work with others to finalise plans	5.1 Agree on a time scale and budget for the completion of plans 5.2 Correspond plans to the original brief with the constraints of budget and technical limitation 5.3 Demonstrate how plans meet with the agreement of any interested parties and are consistent with recognised standards 5.4 Ensure plans correspond to approved values and organisation policies and procedures 5.5 Carry out joint work in a manner which optimises available time and resources and fosters a collaborative working relationship 5.6 Ensure agreements reached include implementation plans at the necessary level of detail and are in line with known strategy 5.7 Maintain records of negotiations and agreements that are accurate, complete, legible and pass on to the appropriate authority 5.8 Obtain any planning and other required permissions necessary to carry out the work
6 Support others in realising the plans	6.1 Review and agree upon a time scale for completion of the project with all those involved 6.2 Establish and agree upon responsibilities for all aspects of the project 6.3 Establish and agree on means of checking progress and dealing with contingencies 6.4 Complete all aspects of project within own area of responsibility within schedule and budget 6.5 Take the necessary remedial action promptly in the event of over-runs, overspends or departures from the original plans
7 Develop management structures for the facility	7.1 Determine management structures which are appropriate to the purpose and use of the facility 7.2 Develop policy and procedures for the use of the facility in consultation with key user groups
8 Review and evaluate development of the facility	8.1 Undertake ongoing monitoring of the development process , consistent with agreed role of stakeholders , to ensure agreed user requirements are met 8.2 Review the development process and outcomes at the completion of the facility 8.3 Monitor the functionality of the facility regularly in consultation with key user groups
9 Check and approve the completed facility	9.1 Ensure the facility conforms to the original plans or variations approved by interested parties 9.2 Raise any concerns over discrepancies with the supplier for clarification and explanation 9.3 Ensure that the facility conforms to relevant standards and legislation 9.4 Ensure the facility is only accepted when all conditions have been met

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Development of facilities	[one category] • may include ○ new ▪ major community facility ▪ small community centre ○ renovation to existing facility or structure ○ extensions to existing facility or structure
Information	[one category] • sources ○ surveys ○ written/published material ○ interviews or meetings
Legislation	[all categories] • State/Territory statutory requirements • local laws, by - laws, ordinances and policy
Organisation policies and procedures	[all categories] • criteria for use and priority access • fee structures • opening hours
Parties	[five categories] • to be negotiated with ○ suppliers ○ architects ○ planners ○ potential users ○ local residents ○ engineers ○ consultants ○ managers • to work with ○ suppliers ○ architects ○ planners ○ potential users ○ local residents

	managers
Physical requirements	[four categories] - storage - layout - loud/quiet areas - wet/dry areas - clean/dirty areas - disabled access - equipment specific to technical requirements of controlling bodies, eg, international/national sporting organisations
Process	[one category] - order of tender/design/costing/approvals - when/whether to appoint architects/builders
Relevant bodies	[one category] - government departments - developers - community groups
Requirements	[all categories] management structure and auspice
Resources	[two categories] - land - building - equipment
Siting of the facility	[all categories] takes into consideration - local/regional facility - transport routes - topography - nature of neighbourhood/facility
Stakeholders	[all categories] - users/clients - organisation staff - elected members - other interested parties - government departments

Tenders and briefs	[all categories] • decisions on layout/allocation of funds in design process involvement in selection for brief and tender
Work environment	[all categories] • varies with respect to ○ size of the organisation ○ location ○ organisation structure ○ nature of the service provided ○ resources available

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of processes involved in establishing the need for facilities and in planning and developing plans for facilities - Assessment of performance should be over a period of time covering one category of facility development and all relevant associated categories from the remaining Range Statements that are applicable in the learners environment - In particular, assessment must confirm the ability to - determine user group needs and trends within the industry - negotiate design briefs - develop a tender brief - cost a tender brief - liaise with all relevant stakeholders - establish budgets for the facility development - respond to overspends and over - runs - check completed work
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - SRXRES005B Achieve an efficient use of resources - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - User group needs and techniques to identify and determine them - Current service trends and developments - Organisation strategic plan, aims and objectives - Organisation priorities - Organisation financial plan and methods of estimating costs - Facility management - Tender legislation and regulations, contractual obligations and relevant legislation - Methods to develop and cost a brief - Current recognised standards in relation to recreational facilities and sources of information on relevant national standards - Methods of monitoring and evaluating progress - Methods of establishing budgets within technical restraints and to work within allocated budgets and time scales - Remedial action in the case of over - runs and overspends - Required skills - Consulting with various representatives - Identification of sources of conflict and application of methods to overcome these - Negotiation with stakeholders - Ability to develop realistic action plans - Mathematical assessment of tenders and budget - Monitoring and assessing/reviewing

	○ Realistic and equitable allocation of responsibilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ a work environment requiring facility development • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Due to issues such as dealing with the complexity of planning a facility, this unit of competency must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to establishing the need and requirements for facility development and planning and facilitating that development
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation facility. For valid and reliable assessment the sport or recreation facility should closely replicate those found in the work environment. The facility should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace • Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a number of locations, any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collecting background information on identified user groups • Communicating ideas and information - Negotiating with relevant bodies regarding the acquisition of resources • Planning and organising activities - Planning the sequence of steps to finalise project • Working with teams and others - Working with a range of people including contractors, local residents and user groups • Using mathematical ideas and techniques - Calculating and monitoring budgets for project • Solving problems - Dealing with budget/time over-runs • Using technology - Using a project management software package to track project Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FIRST AID

Contents

SRXFAD001A Provide first aid.....	1
SRXFAD002A Provide advanced first aid response	8
SRXFAD003A Maintain first aid equipment, resources and records	17
SRXFAD004A Coordinate and implement first aid training	23
SRXFAD005A Manage casualty in a remote and/or isolated area.....	29

SRXFAD001A	PROVIDE FIRST AID
FAD	First aid

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This guideline competency deals with the provision of essential first aid in recognising and responding to an emergency using basic life support measures. The first aider is not expected to deal with complex casualties or incidents, but to provide an initial response where first aid is required. In this guideline competency it is assumed the first aider is working under supervision and/or according to established workplace first aid procedures and policies.

ELEMENT	PERFORMANCE CRITERIA
1 Assess the situation	1.1 Physical hazards to personal and others' health and safety are identified 1.2 Immediate risk to self and casualty's health and safety are minimised by controlling the hazard in accordance with occupational health and safety requirements 1.3 The casualty's vital signs and physical condition are assessed in accordance with workplace procedures
2 Apply basic first aid techniques	2.1 First aid management is provided in accordance with established first aid procedures 2.2 Casualty is reassured in a caring and calm manner and made comfortable using available resources 2.3 First aid assistance is sought from others in a timely manner and as appropriate 2.4 Casualty's condition is monitored and responded to in accordance with effective first aid principles and workplace procedures 2.5 Details of casualty's physical condition, changes in conditions, management and response to management are accurately recorded in line with organisational procedures 2.6 Casualty management is finalised according to casualty's needs and first aid principles
3 Communicate details of the incident	3.1 Appropriate medical assistance is requested using relevant communication media and equipment 3.2 Details of casualty's condition and management activities are accurately conveyed to emergency services/relieving personnel 3.3 Reports to supervisors are prepared in a timely manner, presenting all relevant facts according to established company procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Casualty's condition	[all categories] is managed for • abdominal injuries • allergic reactions • bleeding • burns-thermal, chemical, friction, electrical • cardiac conditions • chemical contamination • cold injuries • crush injuries • dislocations • drowning • envenomation - snake, spider, insect and marine bites • environmental conditions such as hypothermia, dehydration, heat stroke • epilepsy, diabetes, asthma and other medical conditions • eye injuries • fractures • head injuries • minor skin injuries • neck and spinal injuries • needle stick injuries • poisoning and toxic substances • respiratory management of asthma and/or choking • shock • smoke inhalation • soft tissue injuries including sprains, strains, dislocations • substance abuse, including drugs • unconsciousness including not breathing and no pulse
Communication systems	[all categories] • mobile phones • satellite phones • Hf/vhf radio • flags • flares • two way radio • email • electronic equipment
Established first aid principles	[all categories]

	• checking the site for danger to self, casualty and minimising the danger • checking and maintaining the casualty's airway, breathing and circulation
First aid management	[all categories] will need to account for • workplace policies and procedures • Industry/site specific regulations, codes etc • Occupational Health and Safety requirements • state and territory workplace health and safety requirements • allergies the casualty may have • location and nature of the workplace • the environmental conditions, ie, electricity, biological risks, weather, motor vehicle accidents • location of emergency services personnel • the use and availability of first aid equipment and resources • infection control
Medications	[all categories] may include • asthma-aerosol bronchodilators-casualty's own or from first aid kit in accordance with State and Territory legislation • severe allergic reactions-adrenaline-subject to casualty's own regime
Physical hazards	[all categories] may include • workplace hazards • environmental hazards • proximity of other people • hazards associated with the casualty management processes
Resources	[all categories] and equipment are used appropriate to the risk to be met and may include • defibrillation units • pressure bandages • thermometers • first aid kit • eyewash • thermal blankets • pocket face masks • rubber gloves • dressing • spacer device • cervical collars

Risks	[all categories] may include • worksite equipment, machinery and substances • environmental risks • bodily fluids • risk of further injury to the casualty • risks associated with the proximity of other workers and bystanders
Vital signs	[all categories] • breathing • circulations • consciousness

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the provision of essential first aid in recognising and responding to an emergency situation • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learners environment • Assessment must confirm the ability to ○ demonstrate the following knowledge ▪ basic anatomy and physiology ▪ company standard operating procedures (sops) ▪ dealing with confidentiality ▪ knowledge of the first aiders' skills and limitations ▪ occupational health and safety legislation and regulations ▪ how to gain access to and interpret material safety data sheets (MSDSS) ○ evidence should demonstrate the following skills ▪ resuscitation ▪ demonstration of first aid casualty management principles- assessing and minimising danger, maintaining the casualty's airway, breathing and circulation ▪ safe manual handling of casualty ▪ consideration of the welfare of the casualty ▪ report preparation ▪ communication skills ▪ ability to interpret and use listed documents
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXOHS001B Follow defined Occupational Health and Safety policy and procedures
Required knowledge and skills	• Required knowledge ○ Basic anatomy and physiology ○ Duty of care ○ State and territory regulatory requirements relating to currency of skill and knowledge ○ Legal requirements • Required skills ○ Resuscitation ○ Bleeding control ○ Care of unconscious ○ Decision making ○ Infection control ○ Airway management ○ Assertiveness skills ○ Communication skills

Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit but preferably be competent in the unit at the level above - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Consistency in performance should be maintained over the required range of workplace situations until renewal of competence/licence is required by the industry/organisation
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. Competency may be demonstrated working individually, under supervision or as part of a first aid team - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	2	-	1	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collect and analyse information in regard to the casualty's condition • Communicating ideas and information - Communicate clearly with the casualty, supervisors and other medical personnel • Planning and organising activities - Not applicable • Working with teams and others - First aid assistance is sought from others • Using mathematical ideas and techniques - To operate medical first aid equipment • Solving problems - Deal with problems that may arise in provision of essential first aid • Using technology - Technology is used to assess the casualty's condition Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAD002A	PROVIDE ADVANCED FIRST AID RESPONSE
FAD	First aid

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the provision of advanced first aid response, life support, management of casualty(s), the incident and other first aiders, until the arrival of medical or other assistance, and provision of support to other providers.

ELEMENT	PERFORMANCE CRITERIA
1 Assess the situation	1.1 Physical hazards are identified and minimised according to occupational health and safety requirements and workplace procedures 1.2 Risks to first aider and others are assessed and appropriate response determined to ensure prompt control of situation 1.3 The need for emergency services/medical assistance is ascertained and prioritised and triage undertaken where required 1.4 Resources are deployed to appropriate locations as required in accordance with workplace procedures
2 Manage the casualty(s)	2.1 Agreement for management of the casualty's injury/illness is sought from person(s) where relevant 2.2 Welfare procedure is determined and implemented according to casualty(s) needs 2.3 Effects of injury are controlled and appropriate first aid management is determined and applied to meet the needs of the casualty and situation 2.4 Medication is administered according to relevant legislation and manufacturer's/supplier's instructions and subject to casualty's regime 2.5 Casualty(s) condition is monitored and responded to in a timely manner in accordance with effective first aid principles 2.6 Life support equipment is correctly operated where appropriate according to relevant legislation and manufacturer's/suppliers instructions 2.7 Management is finalised according to casualty(s) needs and first aid principles
3 Coordinate first aid activities until arrival of medical assistance	3.1 Available resource required are identified and communication links with appropriate personnel, emergency management services and medical assistance are established as appropriate 3.2 Correct amount of resources are deployed to appropriate locations in an effective manner to ensure timely arrival of required resources 3.3 The provision of resources is documented and modifications recommended 3.4 The management of casualties is coordinated according to worksite evacuation procedures 3.5 Evacuation of casualties is coordinated according to worksite evacuation procedures 3.6 Support services are arranged for personnel involved in the incident in accordance with workplace principles and procedures
4 Communicate essential incident details	4.1 Communication is maintained with relevant personnel using appropriate media and equipment 4.2 First aid information is communicated with other providers/carers as appropriate to meet their needs and in accordance with workplace procedures 4.3 Information is calmly provided to reassure casualty, adopting a

	communication style to match the casualty's level of consciousness
5 Manage casualty in a remote and/or isolated area	5.1 Preparation for isolated/remote travel or work is undertaken, accounting for expected contingencies 5.2 Casualty's condition is assessed and appropriate response is determined in order to minimise hazards and determine need for medical assistance 5.3 Casualty's condition is monitored and responded to in accordance with effective first aid principles 5.4 Reassurance and support is provided to casualty during the wait for medical assistance 5.5 Casualty's comfort is ensured and determined by establishing and explaining the nature of illness/injury and the management procedures 5.6 Shelter from elements is undertaken in accordance with environmental conditions 5.7 Condition of casualty is documented over time to assist in on-going management 5.8 Communication links to medical services are established to ensure prompt control action is undertaken 5.9 Administration of medication is undertaken under medical instruction, using relevant communication equipment 5.10 Consideration on whether to transport casualty to medical assistance or wait is determined by evaluating environmental and casualty's condition 5.11 Assistance in evacuation of the casualty by emergency services is provided as required
6 Evaluate the incident	6.1 Management of the incident is evaluated and where required an action plan is developed in consultation with relevant parties 6.2 Participation in debriefing/evaluation occurs either by self or others or both in order to improve future operations and address individual's needs 6.3 Access is provided to bona fide critical stress facilitators where required/requested 6.4 Site management/procedures are implemented and evaluated in accordance with risk assessment 6.5 Contingency planning is formulated and reviewed to identify and select alternative management and principles

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Casualty's condition	[all categories] is managed for • abdominal injuries • allergic reactions • bleeding • burns-thermal, chemical, friction, electrical • cardiac conditions • chemical contaminations • cold injuries • crush injuries • dislocations • drowning • envenomation-snake, spider, insect and marine bites • environmental conditions such as hypothermia, dehydration, heat stroke • epilepsy, diabetes, asthma and other medical conditions • eye injuries • fractures • head injuries • insect/marine bites • minor skin injuries • neck and spinal injuries • poisoning and toxic substances • respiratory management of asthma and/or choking • shock • smoke inhalation • soft tissue injuries including sprains, strains, dislocations • substance abuse-illicit drugs • unconsciousness including not breathing and no pulse
Communication systems	[all categories] • mobile phones • satellite phones • Hf/vhf radio • flags • flares • two way radio • email • electronic equipment • hand signals

Documentation	[all categories] especially in remote/isolated areas may include • time • fluid intake/output • blood • vomit • faeces • urine • administration of medication including time, date, person administering, dose • vital signs
Established first aid principles	[all categories] • checking site for danger to self, casualty and others and minimising the danger • checking and maintaining the casualty's airway, breathing and circulation
First aid management	[all categories] will need to account for • location and nature of the workplace • the environmental conditions for example electricity, biological risks, weather, motor vehicle accidents • location of emergency services personnel • number of casualties and potential casualties • the use and availability of first aid equipment, resources and pharmaceuticals • confined spaces, subject to industry need • workplace policies and procedures • industry/site specific regulations, codes etc • Occupational Health and Safety requirements • State and territory workplace health and safety requirements may include • administration of analgesic gases • cardiopulmonary resuscitation (CPR) • infection control • semi-automated external defibrillator (SAED) • expired air resuscitation (EAR)
In remote/isolated areas consideration to travel or wait	[all categories] would depend upon • severity of injury • time required for medical assistance to arrive • movement might hinder rescue procedures

Medications	[all categories] may include • oxygen • pain relief-paracetamol in accordance with state and territory legislation, analgesics (Penthrene, entonox-used in mining industry) • asthma-bronchodilator drugs and aerosol bronchodilators-casualty's own or from the first aid kit in accordance with state and territory legislation • severe allergic reactions-adrenaline-subject to casualty's own regime • heart attack-aspirin
Physical hazards	[all categories] • workplace hazards • environmental hazards • proximity of other people • hazards associated with the casualty management processes
Preparation for isolated/remote travel	[all categories] • selection of relevant communication equipment • relevant first aid supplies and resources to cater for environmental conditions
Resources and equipment are used appropriate to the risk to be met	[all categories] and may include • blood pressure cuff • oxygen resuscitation/cylinders • defibrillation units • pressure bandages • thermometers • injections • back boards • stretchers • soft bag resuscitator • first aid kit • eyewash • thermal blankets • pocket face masks • rubber gloves • dressing • spacer device • cervical collars
Risks	[all categories] • worksite equipment, machinery and substances • first aid equipment (oxygen cylinders, defibrillator) • environmental risks • bodily fluids

	• risk of further injury to the casualty • risks associated with the proximity of other workers and bystanders

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the provision of advanced first aid • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate the following knowledge ▪ occupational Health and Safety legislation and regulations ▪ legal responsibilities and duty of care ▪ basic anatomy and physiology ▪ respiratory/circulatory system ▪ how to gain access to and interpret material safety data sheets (MSDSS) ▪ company standard operating procedures (SOPS) ▪ debriefing counselling procedures ▪ dealing with social problems and confidentiality ▪ capabilities of emergency management services ▪ knowledge of the first aiders' skills and limitations ○ evidence should demonstrate the following skills ▪ resuscitation ▪ the use of a semi-automated defibrillator ▪ delivery of oxygen ▪ demonstration of first aid principles ▪ adequate infection control procedures ▪ safe manual handling ▪ consideration of the welfare of the casualty ▪ initial casualty assessment ▪ report preparation ▪ communication skills ▪ incident management skills ▪ ability to interpret and use listed documents
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEMR001A Respond to emergency situations ○ SRXEMR003A Administer oxygen in an emergency situation ○ SRXFAD005A Manage casualty in a remote and/or isolated area ○ SRXRIK001A Undertake risk analysis of activities
Required knowledge and skills	• Required knowledge ○ Basic anatomy-skeleton, muscles, joints, bones ○ Basic physiology ○ Basic toxicology ○ Legal requirements ○ Duty of care ○ State and Territory regulatory requirements relating to currency of

	skill and knowledge • Required skills ○ Transport techniques ○ Assertiveness skills ○ Communication skills ○ Leadership ○ Decision making ○ Infection control ○ Resuscitation ○ Bleeding control ○ Airway management ○ Care of unconscious
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency of performance should be maintained over the required range of workplace situations until renewal of competence/license is required by the industry/organisation
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. Competency may be demonstrated working individually, under supervision or as part of a first aid team • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	1	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Information is collected and analysed in order to provide an appropriate first aid response • Communicating ideas and information - Communication is established and maintained with all relevant personnel and the casualty • Planning and organising activities - Manage the casualty(s) and coordinate first aid response until arrival of medical assistance • Working with teams and others - Obtain agreement for the management of the casualty • Using mathematical ideas and techniques - Operate medical resources and equipment • Solving problems - Review and evaluate the incident • Using technology - Select and use appropriate first aid response equipment Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAD003A	MAINTAIN FIRST AID EQUIPMENT, RESOURCES AND RECORDS
FAD	First aid

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the first aider's responsibilities in ensuring that adequate supplies of first aid equipment and resources and records are maintained. The first aider may or may not necessarily be responsible for the ordering and purchasing of equipment and resources, depending upon the workplace organisational structure.

ELEMENT	PERFORMANCE CRITERIA
1 Maintain first aid resources	1.1 Availability of adequate and relevant resources is ensured and secured in accordance with workplace procedures 1.2 Non-consumables required by workplace are identified and obtained to maintain adequate readiness of supplies 1.3 Consumables required by workplace are identified and obtained to maintain adequate readiness of supplies 1.4 Stock is checked and regular inspection of equipment is carried out for condition and currency 1.5 Equipment is recovered and cleaned, and waste is disposed of safely according to legislative and site procedures 1.6 Resources are maintained in operational readiness in accordance with workplace procedures 1.7 Resources are stored in the correct manner to ensure their future operation and serviceability
2 Record and manage records	2.1 Relevant forms are completed as required according to legislation and site procedures 2.2 Forms are stored in accordance with legislative and site procedures 2.3 Relevant forms are sent to appropriate bodies and appropriate filing of these records and security of such records is undertaken according to workplace and legislative requirements 2.4 Confidentiality of records and information is maintained in accordance with privacy principles and statutory and/or organisational policies

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
First aid resources	[all categories] • non-consumables ○ machines ○ books ○ reference materials including Material Safety Data Sheets, Workplace Health and Safety act ○ legislative regulations ○ stretchers ○ communication systems ○ relevant texts ○ equipment • consumables ○ first aid kits ▪ bandages ▪ tape ▪ scissors ▪ splinter removers ▪ antiseptic ▪ eye management ▪ disinfectants ▪ emergency numbers ▪ contacts etc ○ dressings ○ ointments ○ cold packs ○ analgesics ○ splints ○ sharps disposal ○ bio-hazardous waste ○ medical grade oxygen ○ bandages ○ medication ○ personal protective equipment ○ eye wash ○ disinfectants ○ broncho-dilators ○ cervical collars
Legislation	[all categories] • occupational health and safety legislation • regulations and codes of practice • industrial relations legislation

Codes of practice	[all categories] • industry code • industry standards • company procedures • State and Territory health and safety authorities
Relevant forms	[all categories] • incident/injury forms • casualty history forms • disease notification • workcover forms • medication registers • worker's compensation • day book • pre-participation records (sport) • medical histories • management records • stock records • infection control records • training records
Policies and procedures	[all categories] may be from organisations such as • Australian Resuscitation Council (ARC) • National Health and Medical Research Council (NHMRC) • company standard operating procedures • Australian standards • Worksafe Australia

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the responsibilities required to maintain adequate supplies of first aid equipment, resources and records • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learners environment • In particular, assessment must confirm the ability to ○ maintain adequate supplies of first aid equipment and resources ○ utilise relevant forms to record and manage records
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEMR002A Coordinate emergency response ○ SRXEMR003A Administer oxygen in an emergency situation ○ SRXFAD005A Manage casualty in a remote and/or isolated area ○ SRXOHS002B Implement and monitor the organisation's Occupational Health and Safety policies, procedures and programs ○ SRXRIK001A Undertake risk analysis of activities
Required knowledge and skills	• Required knowledge ○ Occupational health and safety legislation and regulations ○ Legal responsibilities and duty of care ○ Policies and procedures ○ Cleaning agents ○ Stock control ○ Waste disposal ○ Use of referral networks ○ Currency of skills and knowledge ○ Gaining access to Material Safety Data Sheets (MSDS) • Required skills ○ Transportation techniques
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework

	(AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. Competency may be demonstrated working individually, under supervision or as part of a first aid team - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	2	-	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Collect and analyse information about stock, resources and equipment where required • Communicating ideas and information - Order and purchase equipment and resources (if required). Relevant forms for record management are sent to appropriate bodies • Planning and organising activities - Maintain adequate supplies of first aid equipment, resources and manage records • Working with teams and others - Not applicable • Using mathematical ideas and techniques - Calculate supplies of first aid equipment and resources • Solving problems - Problems that arise in maintaining resources or managing records are solved • Using technology - Use technology to assist in maintaining and calculating adequate supplies and managing records Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAD004A	COORDINATE AND IMPLEMENT FIRST AID TRAINING
FAD	First aid

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit encompasses the management of policy development and the implementation of effective systems for human and physical resources to ensure that first aid can be provided in the workplace.

ELEMENT	PERFORMANCE CRITERIA
1 Coordinate and implement effective organisational systems	1.1 Participative processes are coordinated to identify and agree on outcomes 1.2 Processes are initiated to plan, implement and control systems to achieve identified outcomes 1.3 Policies and procedures are implemented/developed to give effect to workplace health and safety legislation, site procedures, Training Package requirements and national training agenda 1.4 Processes are developed in accordance with workplace principles and relevant legislation, and maintained for succession of first aid responsibilities 1.5 Changes in policy and procedures are distributed to relevant personnel using appropriate communication channels 1.6 Review and recommendations of policy and procedures is undertaken and reported when required
2 Implement effective first aid training and practice	2.1 Links are maintained with first aid bodies and professional and clinical organisations/bodies 2.2 Currency of first aid and personal qualifications are maintained in accordance with industry and organisational requirements 2.3 Risks are reviewed and validated against organisational policies and procedures and other standards so that effective risk control procedures can be applied 2.4 Additional training is coordinated, planned, implemented and evaluated in a timely manner to meet the needs of individuals and the work site 2.5 Practices are consistent with current standards and policies 2.6 Planning is coordinated for response to major incidents and made known to the work group in readiness for implementation
3 Maintain up-to-date professional development of knowledge and skills	3.1 Self education process is undertaken where required in accordance with workplace principles and opportunities 3.2 Links are accessed with various professional first aid bodies and organisations to maintain currency in the field 3.3 Relevant information is accessed promptly and made known to the work group and certification is maintained in accordance with workplace procedures and legislation

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
First aid bodies and professional and clinical organisations/bodies	[all categories] could include • Australian Resuscitation Council (ARC) • International liaison committee on resuscitation (ILCOR) • Support groups • Registered providers/authorities
Policies and procedures	[all categories] may be from organisations such as • Australian Resuscitation Council • National Health and Medical Research Council • Australian standards • company standard operating procedures • risk management standards
Relevant information	[all categories] may include • meetings • seminars • log books (personal development) • conferences • alignment with professional first aid bodies
Self education processes	[all categories] may include • attendance at relevant seminars and conferences • maintenance of professional library • membership of other first aid bodies • formal training • supervised or unsupervised practice to maintain currency of competence
Systems	[all categories] may include

	• ordering • skills updating • networking • communication • technological • training and assessment

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of coordinating and implementing first aid training • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learners environment • Assessment must confirm the ability to ○ manage the development of first aid policy and procedures ○ coordinate, plan and implement first aid training and practice ○ undertake self education when required ○ communicate relevant information to the work group
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXOHS003B Establish, maintain and evaluate the organisation's Occupational Health and Safety system ○ SRXRIK002A Manage an organisation's risk ○ SRXRIK003A Develop an organisational risk management policy
Required knowledge and skills	• Required knowledge ○ National training agenda ○ Use of referral network ○ Legal requirements ○ Duty of care ○ State and Territory regulations relating to currency of skill and knowledge ○ Training and assessment ○ First aid principles and practices • Required skills ○ Communication techniques
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit but preferably be competent in the unit at the level above ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for</i>

	<i>Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable in the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. Competency may be demonstrated working individually, under supervision or as part of a first aid team • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	1	-	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Information about workplace policies and procedures is collected and analysed • Communicating ideas and information - Relevant information about policies, procedures and first aid training is distributed through appropriate communication channels. Links are maintained and accessed with first aid bodies and professional and clinical organisations • Planning and organising activities - Policies, procedures and first aid training is developed, implemented and coordinated in the workplace • Working with teams and others - Participative processes are coordinated • Using mathematical ideas and techniques - Not applicable • Solving problems - Problems are solved that may arise in the review of policies and procedures • Using technology - Technology may be used in to coordinate and implement organisational systems Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

SRXFAD005A	MANAGE CASUALTY IN A REMOTE AND/OR ISOLATED AREA
FAD	First aid

DESCRIPTION: This unit has been developed for the Community Recreation, Fitness, Outdoor Recreation and Sport Industry Training Packages.

This unit deals with the provision of first aid to a casualty in a remote or isolated area and their management over an extended period of time until the provision of medical assistance or evacuation of the casualty.

ELEMENT	PERFORMANCE CRITERIA
1 Plan and prepare for remote and/or isolated area	1.1 Preparation for isolated/remote travel or work is undertaken, accounting for identified contingencies 1.2 Appropriate communication equipment is selected to ensure response in the given area 1.3 Relevant first aid supplies are obtained to cover the identified contingencies of the area
2 Assess the situation	2.1 Physical hazards are identified and minimised according to occupational health and safety requirements, workplace procedures and the physical environment 2.2 Risks to first aider and others are assessed and appropriate response determined to ensure prompt control of situation 2.3 The need for emergency services/medical assistance is ascertained and prioritised and triage undertaken where required 2.4 Resources are deployed to appropriate locations as required in accordance with workplace procedures and the limitations of the physical environment
3 Manage the casualty	3.1 Appropriate first aid management is determined and applied 3.2 First aid equipment is improvised as required 3.3 Casualty's condition is monitored and responded to in accordance with effective first aid principles 3.4 Communication links to medical services are established to ensure prompt control action is undertaken 3.5 Administration of medication is undertaken under medical instruction 3.6 Consideration on whether to transport casualty to medical assistance or wait is determined by evaluating environmental and casualty's condition 3.7 Reassurance and support is provided to casualty during the wait for medical assistance 3.8 Casualty's comfort is ensured and determined by establishing and explaining the nature of illness/injury and the management procedures 3.9 Shelter from the elements is undertaken in accordance with environmental conditions 3.10 Casualty's condition is monitored and documented over time to assist in on-going management 3.11 Assistance in the evacuation of the casualty by emergency services is provided as required
4 Coordinate first aid activities until arrival of medical assistance	4.1 Available resources required are identified and communication links with appropriate personnel emergency management services and medical assistance are established as appropriate 4.2 Correct amount of resources are deployed to appropriate locations in an effective manner to ensure timely arrival of required resources 4.3 The provision of resources is documented and modifications recommended 4.4 The management of casualties is monitored in accordance with first aid principles and workplace procedures

	4.5 Evacuation of casualties is coordinated according to worksite evacuation procedures 4.6 Support services are arranged for personnel involved in the incident in accordance with workplace principles and procedures
5 Communicate essential incident details	5.1 Communication is maintained with relevant personnel using appropriate media and equipment 5.2 First aid information is communicated with other providers/carers as appropriate to meet their needs and in accordance with workplace procedures 5.3 Information is calmly provided to reassure casualty, adopting a communication style to match the casualty's level of consciousness
6 Evaluate the incident	6.1 Management of the incident is evaluated and where required an action plan is developed in consultation with relevant parties 6.2 Participation in debriefing/evaluation occurs either by self or others or both in order to improve future operations and address individual's needs 6.3 Access is provided to bona fide critical stress facilitators where required/requested 6.4 Site management/procedures are implemented and evaluated in accordance with risk assessment 6.5 Contingency planning is formulated and reviewed to identify and select alternative management and principles

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Casualty's condition	[all categories] is managed for • abdominal injuries • allergic reactions • bleeding • burns ○ thermal ○ chemical ○ friction ○ electrical • cardiac conditions • chemical contamination • cold injuries • crush injuries • dislocations • drowning • envenomation ○ snake ○ spider ○ insect ○ marine bites • environmental conditions such as hypothermia, dehydration, heat stroke • epilepsy, diabetes, asthma and other medical conditions • expired air resuscitation (EAR) • eye injuries • fractures • gastrointestinal problems • genitourinary problems • head injuries • hyperventilation • illicit drugs • insect/marine bites • minor skin injuries • neck and spinal injuries • needle stick injuries • nose bleeds • poisoning and toxic substances • respiratory management of asthma and/or choking • shock • smoke inhalation • soft tissue injuries including sprains, strains, dislocations • substance abuse • unconsciousness including not breathing and no pulse

Communication systems	[all categories] • mobile phones • satellite phones • HF/VHF radio • flags • flares • two way radio • email • electronic equipment • hand signals
Documentation, especially in remote/isolated areas	[all categories] may include • time • fluid intake/output • blood • vomit • faeces • urine • administration of medication including time, date, person administering
Established first aid principles	[all categories] • checking the site for danger to self, casualty and others and minimising the danger • checking and maintaining the casualty's airway, breathing and circulation
First aid management	[all categories] will need to account for • workplace policies and procedures • industry/site specific regulations, codes etc • occupational health and safety requirements • state and territory workplace health and safety requirements • physical location in which first aid management is conducted • location and nature of the workplace • the environmental conditions for example electricity, biological risks, weather, motor vehicle accidents • physical location in which first aid management is undertaken • proximity of emergency services personnel • number of casualties and potential casualties • the use and availability of first aid equipment, resources and pharmaceuticals • confined spaces, subject to industry need may include • administration of analgesic gases • cardiopulmonary resuscitation (CPR) • infection control • relocations of dislocations

	• semi-automatic external defibrillator (SAED) • spinal evaluation/clearance
In remote/isolated areas consideration to travel or wait	[all categories] would depend upon • severity of injury • time required for medical assistance to arrive • movement might hinder rescue procedures
Medications	[all categories] may include • oxygen • pain relief - paracetamol in accordance with State and Territory legislation, analgesics (Penthrene, Entonox - used in mining industry) • broncho-dilated drugs, in accordance with State and Territory legislation - casualty with asthma usually has own medication, or found in first aid kit • severe allergic reactions - adrenaline - subject to casualty's own regime • heart attack - aspirin
Physical hazards	[all categories] may include • workplace hazards • environmental hazards • proximity of other people • hazards associated with the casualty management processes
Preparation for isolated/remote travel	[all categories] may include • selection of relevant communication equipment • relevant first aid supplies and resources to cater for environmental conditions
Resources and equipment are used appropriate to the risk to be met	[all categories] and may include • blood pressure cuff • oxygen resuscitation/cylinders • defibrillation units • pressure bandages • thermometers • injections • improvised equipment • back boards • stretchers • soft bag resuscitator

	• first aid kit • eyewash • thermal blankets • pocket face masks • rubber gloves • dressing • spacer device • cervical collars
Risks	[all categories] may include • worksite equipment, machinery and substances • environmental risks • bodily fluids • risk of further injury to the casualty • risks associated with the proximity of other workers and by standers • time to transport casualty and/or equipment required for management of casualty's condition

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge in managing casualty in remote and/or isolated area • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's environment • The following knowledge should be demonstrated in assessment ○ occupational health and safety legislation and regulations ○ legal responsibilities and duty of care ○ basic anatomy and physiology ○ respiratory/circulatory system ○ how to gain access to and interpret material safety data sheets (MSDSS) ○ company standard operating procedures (SOPS) ○ debriefing counselling procedures ○ dealing with social problems and confidentiality ○ capabilities of emergency management services ○ knowledge of the first aiders' skills and limitations • The following skills should be demonstrated in assessment ○ resuscitation ○ the use of semi-automatic defibrillator ○ delivery of oxygen ○ demonstration of first aid principles ○ adequate infection control procedures ○ safe manual handling ○ consideration of the welfare of the casualty ○ initial, secondary and ongoing casualty assessment ○ report preparation ○ communication skills ○ incident management skills ○ ability to interpret and use listed documents
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ SRXFAD001A Provide first aid ○ SRXFAD002A Provide advanced first aid response • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ SRXEMR003A Administer oxygen in an emergency situation ○ SRXFAD002A Provide advanced first aid response ○ SRXFAD003A Maintain first aid equipment, resources and records ○ SRXOHS002B Implement and monitor the organisation's Occupational Health and Safety policies, procedures and programs ○ SRXRIK001A Undertake risk analysis of activities
Required knowledge and skills	• Required knowledge ○ Basic anatomy - skeleton, muscles, joints, bones ○ Basic physiology ○ Decision making ○ Legal requirements ○ Duty of care

	○ Care of unconscious ○ State and territory regulatory requirements relating to currency of skill and knowledge • Required skills ○ Transport techniques ○ Assertiveness skills ○ Communication skills ○ Leadership ○ Infection control ○ Resuscitation ○ Bleeding control ○ Airway management
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Consistency of performance should be maintained over the required range of workplace situations until renewal of competence/license is required by the industry/organisation
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe with the hazards, circumstances and equipment likely to be encountered in a real workplace. Competency may be demonstrated working individually, under supervision or as part of a first aid team • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	3	2	1	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - Information is collected and analysed about the remote or isolated location, risks to the first aider and others and condition of the casualty • Communicating ideas and information - Appropriate communication links are selected or established as required. Communication is maintained with the casualty, emergency medical services and support services • Planning and organising activities - Plan and prepare for isolated/remote travel. Conduct and coordinate first aid management until the arrival of medical assistance. • Working with teams and others - Planning and communicating with emergency medical services and support services • Using mathematical ideas and techniques - To monitor casualty's condition • Solving problems - Identifying, formulating and reviewing contingency plans • Using technology - Appropriate medical equipment is used to monitor casualty's condition Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FINANCE

Contents

BSBADM308A Process payroll	1
BSBADM309A Process accounts payable and receivable	8
BSBADM310A Maintain a general ledger.....	15
BSBADM505A Manage payroll.....	21
BSBCMN207A Prepare and process financial/business documents.....	28
BSBCMN308A Maintain financial records	34
BSBCMN408A Report on financial activity.....	41
BSBMGT503A Prepare budgets and financial plans	48
BSBMGT504A Manage budgets and financial plans	54
FNBACC02B Prepare income tax returns.....	60
FNBACC03B Manage budgets and forecasts.....	67
FNBACC04B Prepare financial reports for a reporting entity.....	73
FNBACC05B Establish and maintain accounting information systems.....	79
FNBACC06B Implement and maintain internal control procedures	87
FNBACC10B Implement tax plans and evaluate tax compliance.....	93
FNBACC12B Implement organisational improvement programs	100
FNBACC13B Conduct internal audit	107
FNBACC14B Evaluate business performance	114
FNBACC15B Evaluate organisation's financial performance.....	121
FNBACC16B Evaluate financial risk.....	128
FNBACC17B Develop and implement financial strategies	135

BSBADM308A	PROCESS PAYROLL
FIN	Finance

DESCRIPTION: This unit covers processing of payroll from provided data in manual or computerised payroll systems.

ELEMENT	PERFORMANCE CRITERIA
1 Record payroll data	1.1 Payroll is checked and discrepancies clarified with designated person/s 1.2 Employee pay period details, deductions and allowances are entered in payroll system in accordance with <i>source data</i> 1.3 Payment due to individual employees is calculated to reflect standard pay and variations in accordance with employee source data
2 Prepare payroll	2.1 Payroll is prepared with designated timelines in accordance with organisational policy and procedures 2.2 Total wages for pay period are reconciled, and irregularities checked and corrected, or referred to designated person/s for resolution 2.3 Arrangements for payment are made in accordance with organisational and individual requirements 2.4 Authorisation of payroll and individual pay advice is obtained in accordance with organisational requirements 2.5 Payroll records are produced, checked and stored in accordance with organisational policy and security procedures 2.6 Security procedures for processing payroll and maintaining payroll records are followed
3 Handle payroll enquiries	3.1 Payroll enquiries are responded to in accordance with organisational and legislative requirements 3.2 Information is provided in accordance with organisational and legislative requirements 3.3 Enquiries outside area of responsibility / knowledge are referred to designated person/s for resolution 3.4 Additional information or follow-up action is completed within designated timelines in accordance with organisational policy and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Designated person/s	may include • those who have authority to approve payroll decisions • immediate supervisor
Period details	may include • salary • wage • casual wage • contract • piecework • commission • bonus
Deductions and allowances	may include • income tax • superannuation contributions • health insurance • union dues • travel allowance • car allowance • meal allowance
Payroll system	may include • manual or computerised
Source documents	may include • employee records/history • employee earnings and payroll register

	employee timesheets
Variations	may include - rates of pay - overtime - holiday loading - paid leave - unpaid leave - long service leave - taxation - sick leave
Payroll preparation	may include - calculation of gross pay - taxation and other deductions - net pay - preparing cheques - electronic funds transfer - cash analysis - preparing pay advice slips
Payroll records	may include - pay advice slips - employee summary report - cash analysis sheets - end of month reports - electronic funds transfer - taxation reports - end of year reports - group certificates
Enquiries	may include - face-to-face - email - fax - telephone
Legislative requirements	may include - confidentiality and security records - Australian Tax Office regulations, eg, Australian Business Number, Employment Declaration Forms - payroll tax office - Pay As You Go (PAYG) tax - Medicare levy - Higher Education Contribution Scheme (HECS)
The sport and	covers industry sectors of community recreation, fitness, outdoor

recreation industry	recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge for processing of payroll from provided data in manual or computerised payroll systems - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - integrate demonstration of all elements of competency and their performance criteria - demonstrate knowledge and application of legislative requirements - demonstrate accurate data input - demonstrate knowledge of organisational guidelines relating to security and confidentiality of information
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - BSBADM505A Manage payroll
Required knowledge and skills	- Required knowledge - Relevant legislation from all levels of government that affects business operations, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - Organisational policy and procedures - structure and authority in organisation - Types of payroll systems - Specific legislative requirements - Required skills - Literacy skills to read and understand the organisation's financial policies and procedures and legislative procedures; write cheque or salary authorisations; prepare pay advise slips; maintain records - Numeracy skills for calculating gross and net pay, comparing different rates of pay over a given time span of the same nature, preparing cash analysis sheets, reconciling figures - Communicating skills including questioning, clarifying, reporting - Problem solving skills for reconciling figures and resolving employee enquiries within scope of own responsibility - Time management to meet designated timelines - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace which may include - workplace reference materials such as procedural

	▪ manuals and company policy ▪ calculator ▪ computer equipment and relevant software ▪ payroll data from preceding pay periods • Human resources — assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 • Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated work environment • Assessment should reinforce the integration of the key competencies and common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To input employee information • Communicating ideas and information - To respond to enquiries • Planning and organising activities - To process payroll and prepare pay advise slips • Working with teams and others - To deal with irregularities outside area of responsibility • Using mathematical ideas and techniques - To calculate gross pay • Solving problems - To identify and correct irregularities • Using technology - To process payroll if required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM309A	PROCESS ACCOUNTS PAYABLE AND RECEIVABLE
FIN	Finance

DESCRIPTION: This unit covers maintenance of accounts payable and accounts receivable records, processing of payments to creditors, and handling overdue accounts receivable.

ELEMENT	PERFORMANCE CRITERIA
1 Maintain financial journal systems	1.1 Source documents are checked for accuracy and authorisation 1.2 Errors and discrepancies in source documents are referred for resolution in accordance with organisational policy and procedures 1.3 Transactions are entered into the cash and credit journal system in accordance with organisational policy and procedures and accounting requirements 1.4 Credit journals are totalled in accordance with organisational policy and procedures
2 Prepare bank reconciliations	2.1 Cash journals are checked against bank statements to identify differences 2.2 Cash journals are updated with relevant data from bank statement 2.3 Discrepancies are identified and referred to the appropriate staff/agency 2.4 Cash journals are totalled in accordance with organisational policy and procedures 2.5 Regular reconciliation reports are prepared within designed timelines
3 Maintain accounts payable and accounts receivable systems	3.1 Transactions are entered into individual accounts payable and accounts receivable in accordance with organisational policy and procedures and requirements 3.2 Schedule of accounts payable and accounts receivable are prepared for reconciliation purposes in accordance with organisational requirements 3.3 Schedules of accounts payable and accounts receivable are reconciled with journal data or general ledger in accordance with organisational requirements
4 Process payments for accounts payable	4.1 Accounts payable statements are reconciled with accounting records in accordance with organisational policy and procedures 4.2 Payment documentation is checked for accuracy of information and discrepancies and errors rectified in accordance with organisational requirements
5 Prepare statements for accounts receivable	5.1 Accounts receivable statements are produced and checked for accuracy of content in accordance with organisational policy and procedures 5.2 Discrepancies are rectified and statements are dispatched within designated timelines
6 Follow up outstanding accounts	6.1 Accounts receivable ledger system is maintained in accordance with organisational requirements to reflect the current credit situation 6.2 Aged analysis of accounts receivable is conducted to identify outstanding accounts and determine collection procedures in accordance with organisational requirements 6.3 Outstanding accounts are reported or followed up in accordance with organisational policy and procedures 6.4 Credit terms are monitored and reviewed in accordance with credit policy and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, codes and national standards relevant to the workplace	which may include • award and enterprise agreements and relevant industrial relations • 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
Source documents	may include • invoices received • tax invoices issued • credit notes received • credit notes issued • adjustment notes • cheque butts • receipts
Transactions	may include • credit purchases • credit sales • returns • day-to-day expenses • purchases paid by cheque • withdrawal of cash by owner • payments to creditors • interest charges and bank fees • capital contributions in cash by owner • payments received by debtors • cash sales • cash purchases • commission • interest revenue
Journals	may include • purchases journal • purchases returns journal • cash payments journal • sales journal • sales returns journal

	• cash receipts journal
Systems	may include • manual • computerised
Discrepancies	may include • bank charges • interest • dishonoured cheques • direct payments • direct deposits
Accounts payable and accounts receivable system	may include • accounts payable subsidiary ledger • accounts payable schedule • accounts receivable subsidiary ledger • accounts receivable schedule
Journal data	may include • purchases journal total • purchases returns journal total • accounts payable data from cash payments journal • sales journal total • sales returns journal total • accounts receivable data from cash receipts journal
Checking of payment documentation	may include • attachment of supporting invoices, statements • calculation of discount • cheque data • remittance advise data
Accounts receivable statements	may include • manual system • computerised system • name and address of supplier • name and address of client/accounts receivable • month to which statement is applicable • opening balance if applicable • information about any sales, sales returns, credit, forward orders and payments which have occurred throughout the month • final balance with overdue details if appropriate • any payments received allocated on an invoice by invoice basis

	• discount policy
Credit terms	may include • cash on delivery • cancellation of agreed credit arrangements • arrangements for settlement
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of accounts payable and accounts receivable records, processing of payments to creditors and handling overdue accounts receivable - Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment - In particular, assessment must confirm the ability to - integrate demonstration of all elements of competency and their performance criteria - demonstrate knowledge of accounting record keeping system with regard to maintenance of journals and subsidiary ledgers - demonstrate accurate entry of data into journal and subsidiary ledger system - reconcile subsidiary ledger system with journal or general ledger data - demonstrate systematic tracing of errors
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - Nil - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required 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 - The organisation's accounting system and procedures - Policies and procedures across the range of tasks required - Relevant source documents and information contained within source documents - Definition of accounts payable and accounts receivable - Cross-checking techniques - Limit of scope of own responsibility - Australian Taxation Office regulations - Required skills - Literacy skills to read and understand financial procedures; select and apply the procedures and strategies needed to perform a range of tasks after reading appropriate texts; follow sequenced written instructions - Numeracy skills to use knowledge of mathematical concepts; interpret, compare and calculate with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts - Problem solving skills to use approximation to check for discrepancies - Communication skills follow oral instructions; questioning to clarify information

	○ Proof reading skills to check calculations ○ ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of competency requires access ○ appropriate documentation and resources normally used in the workplace which may include ▪ workplace reference materials such as procedural manuals and company policy ▪ cash journals ▪ credit journals ▪ accounts payable and accounts receivable subsidiary ledgers ▪ calculator ▪ computer equipment and relevant software • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	1	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To post entries to journals and ledgers • Communicating ideas and information - Through debtor and creditor statements • Planning and organising activities - To process payments and receipts • Working with teams and others - To refer discrepancies outside scope of authority • Using mathematical ideas and techniques - To check calculations and work with money, decimals and percentages • Solving problems - To follow outstanding accounts • Using technology - To operate computerised financial record keeping system if required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM310A	MAINTAIN A GENERAL LEDGER
FIN	Finance

DESCRIPTION: This unit covers preparing a general journal, posting journal entries to the general ledger and preparing a trial balance.

ELEMENT	PERFORMANCE CRITERIA
1 Process journal records	1.1 General journal entries are prepared in accordance with accounting requirements 1.2 Journals are posted into general ledger system in accordance with organisational policy and procedures and accounting standards 1.3 Accounts payable and accounts receivable subsidiary ledger systems are reconciled with general ledger 1.4 Processing maintains the accounting equation and is completed with designated timelines
2 Prepare a trial balance	2.1 Trial balance of the general ledger system is prepared in accordance with organisational requirements and accounting standards 2.2 Where trial balance does not balance, irregularities are identified and rectified or referred for resolution in accordance with organisational policy and procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
General journal entries	may include • purchase of non-current asset on credit • sale of non-current asset on credit • correction of posting errors • opening entries • interest expense • interest receivable • bad debts written off • withdrawal of stock/assets by owner
Source journals for general ledger	may include • cash receipts journal • cash payments journal • sales journal • sales return journal • purchases journal • purchases returns journal • general journal
General ledger system	may include • manual • computerised
Reconciling accounts payable and accounts receivable systems	may include • checking accuracy of accounts payable balances with general ledger control account • checking accuracy of accounts receivable balances with general ledger control account

Preparing trial balance	may include • listing ledger account balances from the general ledger • checking total debits equal total credits • tracing errors
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge in preparing a general ledger, posting journal entries to the general ledger and preparing a trial balance • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate all elements of competency and their performance criteria ○ explain the purpose of the general journal and the relationship between journals and the journal ledger ○ demonstrate accurate entry of data ○ implement double-entry principles ○ demonstrate systematic tracing of errors
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBADM408A Prepare financial reports
Required knowledge and skills	• Required 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 ○ Accounting system and procedures ○ The organisation's policies and procedures across the range of tasks required ○ Source documents and information contained within source documents ○ Definition of credits/creditors and debits/debtors ○ Cross-checking techniques ○ Limit of scope of own responsibility • Required skills ○ Literacy skills to read and understand financial procedures; select and apply the procedures and strategies needed to perform a range of tasks; follow sequenced written tasks ○ Numeracy skills to interpret, use knowledge of mathematical concepts; compare and calculate with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts; use a combination of oral and written mathematical and general language for the record keeping process ○ Communication skills to listen to and follow oral instructions; question to clarify information ○ Proofreading skills to check calculations ○ Problem solving skills to reconcile different pieces of mathematical information

	○ Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource implications	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace which may include ▪ enterprise policy and procedures manual ▪ relevant standards and legislation ▪ source journals ▪ accounting system, paper-based, electronic • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
1	1	1	1	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To post journal entries into the general the general ledger • Communicating ideas and information - Through balanced reporting outcome • Planning and organising activities - Comply with organisational procedures and accounting standards • Working with teams and others - To refer irregularities outside own scope of responsibility • Using mathematical ideas and techniques - To reconcile journals and prepare a trial balance • Solving problems - To find and correct irregularities • Using technology - To maintain a general ledger, if required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBADM505A	MANAGE PAYROLL
FIN	Finance

DESCRIPTION: This unit covers the establishment and monitoring of security procedures related to managing payroll services, and the calculation and processing of salary payments, group taxation and related payments.

ELEMENT	PERFORMANCE CRITERIA
1 Establish procedures for the management of payroll	1.1 Security procedures are established that ensure the confidentiality and security of payroll information 1.2 Procedures ensure that claims for allowances are established 1.3 Control measures are established to safeguard the organisation's financial resources in accordance with legislative and organisational requirements 1.4 Systems are established to ensure that statutory obligations are met and records are kept for the period determined by government legislation
2 Prepare payroll data	2.1 Nominated industrial awards, contracts and government legislation are used to calculate gross pay and annual salaries 2.2 Statutory and voluntary deductions are calculated using government and employee documentation 2.3 Payroll data is provided to payroll processor for calculation within designated timelines
3 Authorise payment of salaries	3.1 Payroll is checked and salaries and wages are authorised for payment in accordance with organisational policy and procedures 3.2 Salaries, wages and deductions are reconciled in accordance with organisational policy and procedures 3.3 Salary, wage and related enquiries are dealt with in accordance with organisational policy and procedures
4 Administer salary records	4.1 Declaration forms for new and existing employees are processed in accordance with Australian Taxation Office requirements 4.2 Periodic deductions are forwarded to nominated creditors within designated timelines 4.3 Payments to government authorities are accurately prepared and dispatched in accordance with the relevant government legislation 4.4 Group tax amounts are calculated and/or transcribed and payments made in accordance with taxation procedures 4.5 Employee group certificate amounts are prepared and reconciled from salary records

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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
Security procedures	may include • supervision of timesheets • numbering of payroll registers • employees signing for pay • keeping payroll documents secure • authorised access • computer passwords • backup files • maintaining security and confidentiality of employee's details • restricting access to electronic files and locking paper-based confidential information • ensuring security of password/keys • separating locations of confidential information • storage of information off-site
Control measures	may include • reconciliation of records • separation of duties • authorisation requirements • multiple checks and balances • dual checking system
Legislative and organisational requirements	may include • corporations law • Superannuation Guarantee Act • Australian Taxation Office regulations • Australian Securities Commission requirements • Australian Accounting and Auditing standards • organisational policy and procedures for cash handling

Nominated industrial awards, contracts and government legislation	may include • Federal/State awards • enterprise agreements • certified/workplace agreements
Pay and salaries calculations	may include • appropriate pay structure • time sheets • employment history cards • sick leave • annual leave loading • long service leave • penalty rates • overtime • allowances • deductions • salary packaging items • salary sacrificing
Statutory and voluntary deductions	may include • payroll tax • superannuation levy • Medicare levy • union fees • insurance • Pay As You Go tax • Higher Education Contribution Scheme
Nominated creditors	may include • union • membership organisations • health funds • vehicle leasing organisations • government agencies • Australian Taxation Office • those nominated as part of salary packaging
Designated timelines	may include • stipulated time period before pay is due to employees • stipulated time period before employee departs organisation • Australian Taxation Office timelines for submission of group tax, fringe benefits tax, etc
Legislation, codes and national standards relevant to the workplace	may include • award and enterprise agreements • national, State/Territory legislative requirements especially in regard to

	Occupational Health and Safety • industry codes of practice
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge for establishment and monitoring of security procedures related to managing payroll services, and the calculation and processing of salary payments, group taxation and related payments • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ integrate demonstration of all elements of competency and their performance criteria ○ demonstrate resolution of problems in dealing with staff enquiries and in reconciling records
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBADM308A Process payroll
Required knowledge and skills	• Required 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 ○ Payroll processes ○ Organisational policies and procedures across the full range of tasks required ○ Confidentiality and security procedures ○ Australian Taxation Office legislative requirements ○ Relevant government and statutory bodies in relation to payroll ○ Organisation's accounting system ○ Superannuation Guarantee Act ○ Relevant industrial awards • Required skills ○ Literacy skills to follow complex financial procedures and to follow and write detailed instructions ○ Numeracy skills to use financial formulae, calculate gross and net pay, compare differing rates of pay over a given time span of the same nature, prepare cash analysis sheets, reconcile figures and rectify anomalies ○ communication skills to answer enquiries, explain and resolve discrepancies with employees ○ Problem solving skills to reconcile figures, resolve employees' enquiries; use processes flexibly and interchangeably ○ Proofreading to check for accuracy ○ Time management to meet designated timelines ○ Ability to relate to people from a range of social, cultural and

	ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - appropriate documentation and resources normally used in the workplace which may include - organisation's accounting system - paper-based/electronic payroll system - relevant Australian Taxation Office legislation - Australian Accounting and Auditing Standards - Superannuation Guarantee Act - Higher Education Contribution Scheme - relevant industrial awards - certified/workplace agreements - organisational contracts - calculator - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	In order to achieve consistency in 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 for 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 Statements - Assessment must take account of the endorsed assessment guidelines - 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	2	2	2	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To gather information from legislation, awards and agreements • Communicating ideas and information - To payroll processors • Planning and organising activities - To deal with end-of-month and end of financial year requirements • Working with teams and others - To deal with employee enquiries • Using mathematical ideas and techniques - To reconcile accounts • Solving problems - To ensure the security and confidentiality of records • Using technology - To store payroll information as required Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN207A	PREPARE AND PROCESS FINANCIAL/BUSINESS DOCUMENTS
FIN	Finance

DESCRIPTION: This unit covers the processing of financial transactions including petty cash, invoicing and banking in a business environment.

ELEMENT	PERFORMANCE CRITERIA
1 Process petty cash transactions	1.1 Petty cash claims and vouchers are checked for approval, accuracy and authenticity prior to processing 1.2 Petty cash transactions are processed and recorded within designated time limits 1.3 Irregularities are noted and referred to a nominated person for resolution 1.4 Transactions are checked and petty cash book balanced according to organisational requirements
2 Prepare and process banking documents	2.1 Deposits and withdrawals are accurately entered and balanced according to organisational requirements 2.2 Cheques and credit card vouchers are checked for validity (signatures, dates, amounts) before processing 2.3 Cash, cheques and credit cards are listed on banking forms in accordance with the banking institution's guidelines 2.4 Pay-in documentation is reconciled with all money calculations
3 Reconcile invoices for payment to creditors	3.1 Discrepancies between invoices and source documents are identified and reported to nominated person for resolution 3.2 Adjustments and errors are identified, reported and rectified in accordance with organisational requirements 3.3 Creditor enquiries are answered and/or referred to nominated person for resolution
4 Prepare invoices for debtors	4.1 Invoices are prepared accurately in accordance with organisational requirements 4.2 Invoices are distributed to nominated person for verification prior to despatch 4.3 Adjustments are made as required in accordance with organisational requirements 4.4 Invoices and other related documents are copied and filed for auditing purposes

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, codes and national standards relevant to the workplace	which may include • award and enterprise agreements and relevant industrial instruments • relevant legislation from all level 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
Checking claims for accuracy and authenticity	may include • requiring a receipt • ensuring items purchased are business related • accepting claims from authorised personnel only
Recording petty cash transactions	may include • paper based • electronic • organisational accounting system
Nominated persons	include • petty cash officer • supervisor • accounts department
Organisational requirements	may include • totalling and balancing petty cash book procedures • legal and organisational policy/guidelines and requirements • all cash being accounted for at all times • procedures for entering and balancing deposits • procedures for checking validity of cheques and credit card vouchers • security procedures • Occupational Health and Safety policies, procedures and programs • format of documents for reimbursement • guidelines for updating receipts • Australian Accounting and Auditing standards • designated timelines for petty cash period/pay period
Banking institution's guidelines	may include

	• deposit slips filled out accurately • cash bundled • banking summary provided • banking electronically
Source documents	may include • purchase orders • invoices • receipts • delivery dockets/receipts • credit notes • statements • remittance advices • deposit books
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge for the processing of financial transactions • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate the application of organisations policy and procedures for financial transactions in regard to petty cash, invoicing and bank processes ○ demonstrate accurate processing of petty cash claims and vouchers including identification of irregularities or errors ○ demonstrate accurate preparing and processing of banking documents including identification of irregularities or errors ○ demonstrate accurate reconciliation and payment of invoices for creditors and debtors including identification of irregularities or errors ○ demonstrate the recording and reporting of transactions
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN308A Maintain financial records
Required knowledge and skills	• Required 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 procedures for cash and non-cash handling ○ Knowledge of organisational policies and procedures relating to petty cash, banking, security, invoicing procedures relating to debtors and creditors ○ Understanding banking institution's guidelines ○ Knowledge of methods and techniques for simple calculations ○ Methods of presenting financial data • Required skills ○ Literacy skills to read and interpret financial information; maintain records and banking documents ○ Numeracy skills for checking accuracy of calculations and reconciliation of accounts ○ Proof reading skills for checking accuracy of calculations and reconciliations of accounts ○ Proof reading skills for maintaining accuracy of information ○ Communication skills including reporting of irregularities and errors ○ Ability to relate to people from a range of social, cultural and

	ethnic backgrounds and physical and mental abilities
Resource implications	- Physical resources - assessment of this competency requires access to - source documents - appropriate documentation and resources normally used in the workplace - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	In order to achieve consistency in 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 for 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 Statements - Assessment must take account of the endorsed assessment guidelines - 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	1	1	1	2	1	1
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To process financial documentation • Communicating ideas and information - With members of the work team • Planning and organising activities - For payment of invoices etc • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In processing business transactions • Solving problems - To identify irregularities and errors • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCMN308A	MAINTAIN FINANCIAL RECORDS
FIN	Finance

DESCRIPTION: 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 and maintaining general ledger and preparing a trial balance. It also includes activities associated with the monitoring of cash control for accounting purposes.

ELEMENT	PERFORMANCE CRITERIA
1 Maintain daily financial records	1.1 Daily financial records are maintained correctly and in accordance with organisational requirements for accounting purposes 1.2 Discrepancies or errors in documentation or transactions are identified and rectified or referred to designated persons in accordance with organisational requirements 1.3 Credit and debit transactions are accurately and promptly entered into journals in accordance with organisational requirements
2 Maintain general ledger	2.1 General ledger is maintained in accordance with organisational requirements 2.2 Transactions are posted into the general ledger in accordance with organisational reporting requirements 2.3 Debtors' and creditors' systems are reconciled with general ledger
3 Monitor cash control	3.1 Cash flow is accurately accounted for in accordance with organisational requirements 3.2 Payments are made and received in accordance with organisational requirements 3.3 Outstanding accounts are collected or followed up within the designated timelines 3.4 Payment documentation is checked for accuracy of information and despatched to creditors within designated timeline

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 ○ cash receipts journal ○ sales return journal ○ general journal • checking accuracy of creditor account balances ○ 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 schedule equals the balance of the creditors 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations

	• large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the maintenance of financial records for a business • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ identify and respond to discrepancies and errors ○ transfer and record financial data accurately ○ identify and comply with organisational requirements ○ reconcile expenditures and revenue ○ recommend options for financial decision making
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN207A Prepare and process financial/business documents ○ BSBCMN408A Report on financial activity.
Required knowledge and skills	• Required 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 • Required 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 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	• Physical resources - assessment of this competency requires access to ○ real work environment ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competencies Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
2	2	2	1	2	1	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To process financial documentation • Communicating ideas and information - With members of the work team • Planning and organising activities - For payment of invoices etc within the designated timeframes • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In reconciling financial documents • Solving problems - To identify discrepancies and errors • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBCM408A	REPORT ON FINANCIAL ACTIVITY
FIN	Finance

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Compile financial information and data	1.1 Current financial data is collected, evaluated and coded to ensure consistency, quality and accuracy in accordance with organisational requirements 1.2 Conversion and consolidation procedures are used to compile analysis in accordance with organisational requirements 1.3 Asset and liability valuations are made, recorded and disclosed in accordance with organisational requirements 1.4 Discrepancies, unusual features or queries are identified, resolved or referred to the appropriate authority
2 Prepare statutory requirement reports	2.1 Income and expenditure is correctly recorded to ensure compliance with statutory requirements 2.2 Liabilities for tax are calculated in accordance with current legislation and revenue gathering practices 2.3 Relevant receipts, revenue documentation and payments are identified correctly 2.4 Statements and claims take full advantage available benefits and allowances in accordance with statutory requirements 2.5 Statutory requirement reports are submitted to appropriate authorities within stated deadlines
3 Provide financial business recommendations	3.1 Recommendations are logically derived and supported by evidence in report 3.2 Recommendations propose constructive actions to enhance the effectiveness and efficacy of functions and services 3.3 Recommendations are concise and facilitate direction and control of organisation's operations 3.4 Significant issues statements including comparative financial performances are identified and prioritised for review and decision-making 3.5 Structure and format of reports are clear and conform to organisational and statutory requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Legislation, codes and national standards relevant to the workplace	which may include • award and enterprise agreements and relevant industrial instruments • relevant legislation for 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 ○ 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of reporting of financial activity for business both in response to client requests and to meet statutory requirements • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ organise financial data to highlight relevant features ○ present information in comprehensive formats ○ complete Business Activity Statements ○ interpret and identify applications of statutory requirements ○ refer discrepancies outside scope of own responsibility to the appropriate persons
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBCMN308A Maintain financial records
Required knowledge and skills	• Required 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 • Required 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework Level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	2	2	2	3	2	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To forecast and provide recommendations • Communicating ideas and information - With members of the work team • Planning and organising activities - For completion of statutory returns • Working with teams and others - In completing scheduled tasks • Using mathematical ideas and techniques - In reconciling financial documents • Solving problems - To identify discrepancies and errors • Using technology - To complete allocated tasks Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBMGT503A	PREPARE BUDGETS AND FINANCIAL PLANS
FIN	Finance

DESCRIPTION: This unit covers the preparation of financial plans and budgets by operational/non-financial managers, as required by their particular organisation.

ELEMENT	PERFORMANCE CRITERIA
1 Analyse strategic and operational plans	1.1 Strategic opportunities are expressed in terms of tactical and operational objectives 1.2 Tactical and operational objectives are converted into special projects or work programs 1.3 Financial trends are analysed and interpreted in the context of the organisational strategic objectives 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 budgets and plans 2.2 Consultation occurs with all relevant groups and individuals throughout the organisation 2.3 Proposals are developed taking account of past experience, present trends and future expectations 2.4 Outcomes of proposals are clearly linked to organisational strategic objectives 2.5 Realistic cost benefit and risk analyses/management plans are incorporated into all proposals 2.6 Organisational investment target rates are met for capital expenditure proposals 2.7 Performance measures and tactics for monitoring and control processes are identified for each proposal/action 2.8 Proposals comply with the organisation's values, policies, code of conduct, legal and ethical obligations 2.9 Proposals are developed within the agreed timeframes 2.10 Supporting evidence 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

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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 outflow 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
Delegation	means • the decision-making accountabilities relating to the person's position description and/or other written 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
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of the preparation of financial plans and budgets by operational/non-financial managers • Assessment of performance should be over a period of time covering all categories from the Range Statement applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ demonstrate the need to be clearly evidenced, both in terms of outcome and process, but this can be achieved through a holistic project approach to assessment ○ 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 ○ demonstrate preparation and negotiation of proposed plans with clear links to strategic and operational plans ○ demonstrate Occupational Health and Safety considerations which may include ▪ sufficient resources for strategic and operational plans ▪ proposals to include risk assessment and control ▪ proposals meet legislative requirements and address organisational objectives
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following units(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required 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 ▪ operational ○ Consultative methods and processes ○ Capital investment evaluation techniques ○ Performance measurement ○ Organisation role in respect to financial delegations, accountabilities and responsibilities ○ Standards for organisational record-keeping and audit requirements • Required 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 (net present value (NPV), internal rate of return (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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• In order to achieve consistency in 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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To support budget proposals • Communicating ideas and information - To develop a communication plan for the budget • Planning and organising activities - To develop budgets • Working with teams and others - To ensure appropriate groups and individuals participate in the process • Using mathematical ideas and techniques - To build the budget and other financial plans • Solving problems - To successfully negotiate commitment to the plans • Using technology - To assemble the plans and communicate them to users of the plans Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

BSBMGT504A	MANAGE BUDGETS AND FINANCIAL PLANS
FIN	Finance

DESCRIPTION: 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.

ELEMENT	PERFORMANCE CRITERIA
1 Communicate budget and financial plans	1.1 Budget/financial plan communication package reviewed by finance specialists 1.2 Package is amended/revised where appropriate 1.3 Training activities are undertaken with users of the budget and plans across the organisation 1.4 All data and terms are defined and understood by the users of the plans 1.5 Communication outcomes are tested to ensure clear understanding of objectives, processes and accountabilities
2 Monitor and control activities against plans	2.1 Delegations and budget accountabilities are confirmed in writing prior to budget period 2.2 Funds are allocated in accordance with budget objectives and parameters 2.3 Recording systems and documentation meet all audit requirements and legal obligations 2.4 Risk management plans are implemented and contingency plans in place for all financial plans 2.5 Performance is monitored and variances identified on a real time basis 2.6 Variances are analysed in conjunction with relevant experts to determine cause and effect 2.7 Remedial action is taken swiftly to minimise negative impact and maximise benefits 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 3.2 Financial performance is analysed and reported in a form and language appropriate to the audience 3.3 Non financial objectives are reported in the context of overall organisational performance 3.4 Strategies and plans are reviewed and updated to optimise organisational performance

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
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

	• Occupational Health and Safety • quality • market share • customer service • security or any other key result area
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of financial management for operational managers • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ 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 ○ demonstrate 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 and follow up action ○ demonstrate Occupational Health and Safety considerations which may include ▪ establishment and maintenance of records ▪ assessment of performance in financial and non-financial terms
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ BSBMGT503A Prepare budgets and financial plans
Required knowledge and skills	• Required 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 ▪ 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 • Required skills ○ Financial planning skills to develop formal estimates of reviews,

	- cost, 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	• Physical resources - assessment of this competency requires access to ○ appropriate documentation and resources normally used in the workplace • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
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 for 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 Statements • Assessment must take account of the endorsed assessment guidelines • 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 common competencies for the particular Australian Qualifications Framework level. Refer to the Key Competency Levels at the end of this unit

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - To monitor budget performance • Communicating ideas and information - To ensure the budget and its impact on people is understood • Planning and organising activities - To train users in the elements of the budget which affect them • Working with teams and others - To review budget performance • Using mathematical ideas and techniques - To measure budget performance, calculate variances and present outcomes • Solving problems - To maintain operations within budget • Using technology - To manage budget performance and develop performance reports Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC02B	PREPARE INCOME TAX RETURNS
FIN	Finance

DESCRIPTION: This unit covers the competency to prepare income tax returns for individuals in accordance with statutory requirements.

ELEMENT	PERFORMANCE CRITERIA
1 Gather and verify data	1.1 Current data on assessable income and allowable deductions are gathered from appropriate sources 1.2 Valuations are made, recorded and disclosed in accordance with business policies and procedures 1.3 Discrepancies , unusual features or queries are identified, resolved or referred to the appropriate authority 1.4 Accrued or prepaid income and expenditure is identified and adjustments to the value of assets and liabilities are recorded
2 Calculate taxable income	2.1 Liabilities for tax are calculated in accordance with current legislation and revenue gathering practices 2.2 Relevant source documentation is identified correctly 2.3 Tax returns, statements and claims take full advantage of available benefits and allowances in accordance with statutory requirements 2.4 Returns are prepared within established timelines
3 Review compliance	3.1 Relevant returns are submitted to appropriate authorities within stated deadlines 3.2 Current obligations are fulfilled and advice from taxation authorities followed and reported in accordance with statutory requirements 3.3 Statements give clear indication of impact of taxation on individual 3.4 Tax office enquiries and income tax audit requirements are met

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Authoritative and recognised sources	may include • Taxation Law • Australian Tax Office • professional associations • financial information systems • personnel information systems • Australian Accounting Standards • asset registers • Australian Prudential Regulation Authority
Business policies and procedures	may include • reporting requirements • financial analysis assessments • electronic data entry • recording and filing systems • standard financial analysis techniques • financial management manuals
Discrepancies	may include • expenditure report mismatches • incorrect payments • absence of auditable trail • inappropriate authorisations • variances from budget • incorrect report formats
Appropriate authority	may include • Managers • business guidelines and procedures • agreed criteria
Assets and liabilities	may include • property investments • shares, bonds, securities • loans, leases, debts • plant and equipment • personnel

	• cash
Source documentation	may include • order and supplier documentation • financial institution statements • taxation and statutory returns • vehicle log books • statutory declarations • invoices • receipts
Statutory requirements	may include • reporting periods • taxation payment timings • delegated authorities • internal control procedures
Formats	may include • statutory forms • financial reports • spreadsheets • electronic forms
Statements and returns	may include • financial statements • financial institution statements • asset usage reports • taxation declarations • inventory usage reports
Taxes	may include • Capital Gains Tax • individual income tax • partnership
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 • rebates and offsets • interest payments
Stated deadlines	may include • monthly returns • annual reports • lodgement dates • payment schedules
Obligations	may include • lodgement dates • supporting documentation • explanatory statements • repayment schedules
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to prepare income tax returns for individuals in accordance with statutory requirements • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ interpret and identify application of statutory requirements ○ document financial data in statutory formats ○ accurately estimate taxation and statutory liabilities ○ evaluate and depreciate assets and liabilities
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Note: As stipulated by the Tax Agents Registration Board, the taxation knowledge components only of this accounting unit of competency must be tested through written examination. All other components can be assessed as advised in the Assessment Guidelines section of this package ○ Income tax legislation ○ State and federal government taxes and charges ○ Options, methods and practices for deductions, benefits and depreciation ○ Ethical considerations for the handling of returns (eg, conflict of interests, confidentiality, disclosure requirements) • Required skills ○ Interpersonal skills and communication skills (eg. liaising, listening, consulting) ○ Report writing and documentation preparation ○ Recording, gathering and consolidating financial information ○ Researching and identifying legislation and rulings applicable to income taxation ○ Information technology use for the set up and analysis of spreadsheets ○ Planning skills for timetabling and scheduling reports and lodgements
Resource implications	• Physical resources - assessment of this competency requires access to ○ systems which facilitate recording of trainee's profiles and progress ○ facilities for workplace or simulated environment assessment • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must

	○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC03B	MANAGE BUDGETS AND FORECASTS
FIN	Finance

DESCRIPTION: This unit covers the competency to prepare and manage complex budgets and forecasts.

ELEMENT	PERFORMANCE CRITERIA
1 Prepare budgets	1.1 Cash, expenditure and revenue items are clearly defined and relevant to identified objectives of the budget 1.2 Budget objectives are clear and consistent with organisational aims and projects 1.3 Discussions and negotiations with stakeholders are conducted in a manner that promotes understanding, goodwill and ongoing co-operation 1.4 Milestones and performance indicators are identified and included in budgets to monitor financial performance 1.5 Annual budgets are broken down into seasonal periods in accordance with operating trends
2 Forecast estimates	2.1 Estimates of future cash flow, costs and revenues are realistic and attainable and supported by verifiable evidence and source documentation 2.2 Relevant data for forecasts are identified and changes in circumstances anticipated 2.3 Assumptions and parameters are established and reviewed for accuracy, relevance and compliance with organisational procedures and policies 2.4 Financial risks are identified and protection strategies initiated in accordance with organisational procedures and policies
3 Document budget	3.1 Data is presented in a format that is easily understood and appropriate to budget reporting 3.2 Reports are completed within timelines and distributed for specified periods and projects 3.3 Trends, issues and comparisons are identified and reported in a structured format to ensure transparency and validity of analysis 3.4 Feasibility is identified by comparison of projections with market growth and development
4 Monitor budget outcomes	4.1 Budget variances are prepared in accordance with organisational procedures 4.2 Budget variances are analysed 4.3 Recommendations based on the analysis are made to client/designated person 4.4 Budget processes are reviewed and implemented as required

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Budgets	may include • sales budgets • purchase budgets • labour budgets • production budgets • manufacturing budgets • statement of financial performance • statement of financial position • cash budgets
Expenditure and revenue items	may include • revenue producing expenditures • occasional expenditures • discretionary expenditure • client and supplier payments, eg, sales and commissions • fees and charges • capital expenditure • community service obligation expenditure • sales • service fees • other revenues
Budget objectives	may include • annual planning • rolling forecasts (next period, monthly, next year) • strategic review (long term) • debt reduction • business expansion and growth • cost reduction • solvency
Stakeholders	may include • employees • clients • Managers and Company Officers, eg Company Directors and Board of Management • financial institutions • suppliers • Ministers

	Chief Executive Officers
Milestones and performance indicators	may include - reports (quarterly, half yearly, annual) - compliance with scheduled payment dates - profits and losses - debt reduction targets - unit costs
Verifiable evidence and source documentation	may include - order and supplier documentation - invoices/receipts - financial institution statements - taxation and statutory returns
Data	may include - cash flow projections - fixed costs - variable business costs - sales records and projections
Assumptions and parameters	may include - expenditure limits - productivity levels - cash and business returns - market share growth - competitors' behaviour - regulatory stability
The sport and recreation industry	- covers industry sectors of community recreation, fitness, outdoor recreation and sport - significant roles played by activity organisations, industry peak bodies, professional organisations - large volunteer base - high turnover of volunteers - high levels of part time and casual employment - irregular working hours - relatively few professional positions - workforce employed mostly in operational positions - mainly small business or self-employed personnel - slow to take up technology - over 2/3 of the sport and recreation industry have no formal/recognised qualifications - significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to prepare and manage complex budgets and forecasts • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ accurately estimate cash flows and returns ○ logically and clearly present financial conclusions ○ interpret financial data to identify trends ○ gather, reconstruct and record data in appropriate consolidated formats
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of budgetary control ○ Forecasting techniques ○ Principles of double entry book keeping ○ Principles of statistical analysis and measures of variance ○ Organisational procedures and policies ○ Principles and practices of accrual accounting ○ Ethical considerations for budgetary forecasting and projections, eg, strength of assumptions, forecast reliabilities) ○ principles of corporate governance • Required skills ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Information technology use for the set up and analysis of spreadsheets ○ Estimating, forecasting and analysis skills ○ Reading, interpreting financial statements and reports ○ Writing skills for reports and recommendations ○ Numeracy for financial calculations and analysis ○ Recording, gathering and classifying financial information
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area

	○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC04B	PREPARE FINANCIAL REPORTS FOR A REPORTING ENTITY
FIN	Finance

DESCRIPTION: This unit covers the competency to develop and prepare financial reports for reporting entities with one wholly owned subsidiary.

ELEMENT	PERFORMANCE CRITERIA
1 Compile data	1.1 Data is systematically coded, classified and checked for accuracy and reliability in accordance with organisational policies, procedures and accounting standards 1.2 Conversion and consolidation procedures are used to compile data in accordance with organisational policies and procedures 1.3 Valuations in compliance with relevant accounting standards and are recorded 1.4 Effects of taxation are identified and recorded
2 Prepare reports	2.1 Charts, diagrams and supporting data are presented in a appropriate format 2.2 Structure and format of reports are clear and conform to statutory requirements and organisational procedures 2.3 Statements and data are error free, comprehensive and comply with statutory requirements and organisational procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Data	may include • share and debenture issues • financial/operational statements and reports, eg, expenditures and receipts, profit and loss statements • market valuations
Conversion and consolidation procedures	may include • purchase of the business by a company • consolidation of a wholly owned subsidiary
Organisational policies and procedures	may include • accounting procedures manuals • ethical requirements • reporting requirements
Accounting standards	may include • applicable accounting standards (Australian Accounting Standards Board [AASB's] and Australian Accounting Standards [AAS's] where alternative AASB's are unavailable)
Report formats	may include • cash flow statements • statutory forms • financial year reports • statement of financial position • statement of financial performance • spreadsheets • electronic forms
Statutory requirements	may include • reporting periods • taxation payment timings • delegated authorities
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport

	• significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to develop and prepare financial reports for reporting entities with one wholly owned subsidiary • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ organise financial data to highlight relevant features ○ present information in comprehensible formats ○ interpret trends to identify critical factors influencing performance ○ value assets
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Options, methods and practices for deductions, benefits and depreciations ○ Organisational guidelines and procedures ○ Principles of double entry book-keeping and accrual accounting ○ Relevant business legal requirements ○ Methods of presenting financial data ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Ethical considerations, eg, conflict of interests, confidentiality, disclosure requirements ○ Accounting computerised systems ○ Business taxation requirements • Required skills ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Report writing, preparation and formatting ○ Numeracy skills for calculation of data ○ Researching for data testing and collection ○ Estimating, forecasting and analysis skills ○ Information technology skills for set up and use of spreadsheets and preparation of documents
Resource implications	• Physical resources - assessment of this competency requires access to ○ systems which facilitate recording of trainee's profiles and progress ○ facilities for workplace or simulated environment assessment • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit

	○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• Competency is demonstrated by performance of all stated criteria including the Evidence Guide and the Range Statements applicable to the workplace • Assessment must take account of the endorsed assessment guidelines • Assessment performance requirements in this unit should be undertaken in an actual workplace or simulated environment • Assessment should reinforce the integration of the key competencies for the particular Australian Qualifications Framework level

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	2	2	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC05B	ESTABLISH AND MAINTAIN ACCOUNTING INFORMATION SYSTEMS
FIN	Finance

DESCRIPTION: This unit covers the competency to establish and maintain accounting information systems.

ELEMENT	PERFORMANCE CRITERIA
1 Identify record and system requirements	1.1 Comprehensive specifications are prepared based on requirements of potential users 1.2 Conflicting requirements are identified and solutions are negotiated prior to and during development process 1.3 Objectives are defined and specifications documented to establish the expected inputs, outputs and means of delivery 1.4 System and record requirements are prioritised according to importance and urgency of user needs 1.5 Security requirements to maintain system integrity are identified and incorporated into the system design 1.6 Features of existing system (if any) and records are reviewed to establish their suitability and useability 1.7 Recording processes are established according to accepted practice and in accordance with Australian Accounting Standards, Company policy and Australian Corporations law, Company Directors, Corporate Governance policies and/or codes of practice
2 Evaluate alternative systems	2.1 Features of various systems are compared and measured against user requirements to enable identification of alternative systems and solutions 2.2 Cost/benefit analysis on alternative systems and solutions is carried out and subsequent recommendations are documented
3 Acceptance test system	3.1 System is tested in an operational environment to ensure compliance with user requirements, system specifications and with Australian Accounting Standards, Company policy and guidelines, relevant legislation or industry codes of practice 3.2 Formal confirmation from all users is obtained on acceptability of new systems/system changes against all criteria and system specifications
4 Prepare system documentation	4.1 System documentation is prepared thoroughly and accurately using clear and simple language and in a clear format to enable system implementation and training 4.2 Users are consulted to ensure clarity, accuracy, thoroughness and useability of system documentation 4.3 System documentation is made easily accessible and is constantly reviewed and updated to ensure currency and accuracy
5 Implement reporting systems and records	5.1 Implementation is carried out in accordance with specified guidelines and timelines 5.2 Contingency plans are established to deal with potential delays or problems 5.3 Effective training schedules and programs are established to support implementation 5.4 All data is transferred from existing to new/modified system and records without error or loss 5.5 Systems and records are updated regularly to identify on going benefits and threats to the organisation 5.6 Files are maintained within organisational and statutory requirements and

	discrepancies identified and remedied 5.7 Integrity of systems and records complies with organisational and statutory requirements 5.8 Transactions are monitored to identify taxation and other liabilities
6 Monitor reporting systems	6.1 Transactions are analysed and accounted for completely and are correctly related to accounting period 6.2 Processes for recording and classifying transactions are communicated and promoted to support internal verification of records 6.3 Sources of input data and documentation are standardised in structured formats to minimise errors 6.4 Back ups are maintained in accessible location to safeguard data in accordance with organisational and audit requirements
7 Review reporting procedures	7.1 Sources of input data and documentation records are systematically checked for accuracy and reliability 7.2 Reporting requirements are established and analysed regularly to identify variations and compliance with established processes for recording and classifying transactions 7.3 Written reports, explanatory notes and financial results are maintained to support source documentation

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Systems and records	may include • software packages • user manuals • pro forma forms and other documents • management information systems
System specifications and features	may include • cost • compliance and reporting requirements • technical, functional and operational features • integration with existing/other systems, data, records • company policies and guidelines • applicable to large, medium or small organisations
Company policy and guidelines	may include • accounts and records • auditing practices and procedures • client service • clerical and administrative systems • information technology • corporate governance
Legislation and industry codes of practice	may include • Australian Accounting Standards • Australian Auditing Standards • Taxation Law • Privacy Act • Corporations Law • Contracts Law • Trade Practices Law • Trust Law • Consumer Affairs Law • Relevant Industry Codes of Practice • AICD Policies
System testing	may include • running current system in parallel with new/modified system for defined periods of time

	ensuring operational capability matches system specifications and user requirements
System documentation	may include - user documentation (including manuals/guidelines) - system specifications - technical/operations manual - training material, etc
Accounts and records	may include - asset management accounts - loan accounts - expense accounts - cash and trading accounts - credit balances - electronic formats, eg, forms, spreadsheets - master files - client histories
Organisational and statutory requirements	may include - reporting requirements, eg, financial reporting cycles - financial analysis assessments, eg, growth prospects against prior and current periods - electronic forms - overdue accounts and debt recovery procedures - exception reports
Discrepancies	may include - expenditure report mismatches - incorrect payments - absence of audit trails - inappropriate authorisations - variances from budget and phasings - unreconciled cash flows and operating statements - incorrect report formats
Transactions	may include - purchases - payments - journal entries - receipting - financial adjustments, eg, write offs, revaluations
Taxation liabilities	may include - State Government charges, eg, Payroll Taxes - Goods and Services Tax (GST)

	• Corporate Tax • Capital Gains Tax • Fringe Benefits Tax • superannuation requirements • wine equalisation tax
Processes for recording and classifying transactions	may include • electronic data entry • paper based files • periodic updates, eg, daily, transaction based, monthly • centralised and decentralised recording • classification by account type • classification by account performance • recording authorities
Sources of input data and documentation	may include • invoices • purchase orders • requisitions • receipts • system reports
Internal audit requirements	may include • computer assisted audit techniques (CAAT) • continuity of reliance • transaction histories • periodic updating • disclosure practices • audit trails
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects to be considered	• Assessment must confirm sufficient knowledge to establish and maintain accounting information systems • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ select and apply at least one functional desktop application to produce several workplace documents ○ apply a range of features from at least one desktop application to produce workplace documents ○ access, retrieve and store of required data ○ select and implement systems
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Common routines for recording and storing data ○ Principles of internal control (including statutory reporting) ○ Methods of data protection including back ups and security ○ Principles and practices of budgetary control, eg, double entry bookkeeping and accrual accounting ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Ethical considerations for the handling of financial reconstruction, eg, conflict of interests, confidentiality, disclosure requirements • Required skills ○ Research skills for tracing use of financial data ○ Writing skills for report preparation of procedures ○ Planning skills for evaluating routines for handling data ○ Interpersonal skills for problem solving ○ Information technology use for the set up and analysis of spreadsheets
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework

	(AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC06B	IMPLEMENT AND MAINTAIN INTERNAL CONTROL PROCEDURES
FIN	Finance

DESCRIPTION: This unit covers the competency to implement and maintain internal control procedures.

ELEMENT	PERFORMANCE CRITERIA
1 Review corporate governance requirements	1.1 Corporate governance requirements are identified and analysed to determine application to operations 1.2 Clarifications on application of corporate governance requirements are accessed from authoritative and recognised sources 1.3 Internal control procedures are reviewed and developed reflecting the application of corporate governance requirements to internal operations
2 Implement operating procedures	2.1 Financial delegations and accountabilities are maintained and reviewed to ensure consistency and compliance with internal control procedures 2.2 Required reports are produced, reviewed and distributed within agreed timelines 2.3 Timetables for the implementation of corporate governance requirements are developed in consultation with stakeholders 2.4 Internal control procedures are detailed and documented in standardised formats to promote consistency of use
3 Monitor policy	3.1 Applications of corporate governance requirements are developed from published sources or recognised practices 3.2 Performance indicators are developed and reported on to evaluate compliance with internal control procedures 3.3 Variations in adoption of statutory requirements in operations are identified and evaluated to determine causes 3.4 Modifications to procedures are developed and implemented to facilitate compliance with internal control procedures

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Corporate governance requirements	may include • reporting periods • taxation payment timings • delegated authorities • legislation, eg. Corporation's and Tax law • Common law
Authoritative and recognised sources	may include • Australian Securities and Investments Commission • Australian Tax Office • professional associations • financial information systems • personnel information systems • asset registers • Laws and regulations • Pronouncements • Ethical considerations
Internal control procedures	may include • identification, measurement and recording of income, assets, expenditure, liabilities and equity • safeguarding and insurance of assets • decision making authorities • accuracy in valuations • adequate disclosure in financial reporting • risk management strategies • electronic commerce security
Financial delegations and accountabilities	may include • loan and lending approvals • expenditure and investment approvals • sign off authorities • employment delegations • corporate governance requirements
Required reports	may include • balance sheets • operating statements

	• cash flow statements • capital statements • internal management reports • transaction and auditable trails
Stakeholders	may include • employees • clients • Managers and Company Officers, eg, Company Directors and Board of Management • financial institutions • suppliers
Performance indicators	may include • reporting deadlines (quarterly, half yearly, annual) • accuracy in costings • profits and losses • auditable trails • use of formats • recurrence of errors • solvency
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to implement and maintain internal control procedures • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ research and interpret application of corporate governance requirements ○ evaluate routines against compliance procedures ○ troubleshoot problems and errors ○ co-ordinate activities to ensure consistent application of guidelines
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Methods of work practices and routines ○ Principles of internal control and auditing ○ Organisational guidelines and procedures ○ Ethical considerations for management and handling of files and records, eg, confidentiality • Required skills ○ Writing skills for preparation of reports and documenting procedures ○ Setting up and maintaining records and files ○ Research skills for assessing application of corporate governance requirements ○ Administrative procedures for timetabling and scheduling ○ Interpretation of legislation ○ Information technology skills for set up and use of spreadsheets
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources — assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework

	(AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	2	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC10B	IMPLEMENT TAX PLANS AND EVALUATE TAX COMPLIANCE
FIN	Finance

DESCRIPTION: This unit covers the competency to implement tax plans and evaluate tax compliance.

ELEMENT	PERFORMANCE CRITERIA
1 Assess tax liabilities	1.1 Organisational and operational tax liabilities are identified by analysis of external and internal transactions 1.2 History and trends in obligations arising from organisational transactions are quantified using standard accounting techniques 1.3 Data from transactions are analysed to resolve ambiguities and determine the nature of taxation options 1.4 Effects of taxes are analysed and scheduled by assessing methods of determination, tax bases and timing of incidence
2 Optimise tax positions	2.1 Implications of obligations on operations and structures are assessed to develop a range of treatments and responses 2.2 Financial management strategies are developed to ensure the alignment of cash flow with incidence and schedules of tax payments 2.3 Trends in tax liabilities are analysed and monitored to develop a history of obligations and compliance
3 Establish processes and plans	3.1 Management plans and record keeping systems are developed to implement financial management strategies and ensure the maintenance of an audit trail 3.2 Management processes are documented to ensure they promote standard application of compliance requirements 3.3 Taxation liabilities are derived from income and expenditure estimates using standard accounting techniques 3.4 Budgets are prepared in accordance with estimates and reviewed to ensure ongoing relevance of liability estimates
4 Evaluate tax policies	4.1 Variances between liabilities and taxation plans are analysed to identify errors in tax strategies 4.2 Performance of tax liabilities in similar or related organisations and operations are monitored and evaluated to measure tax effectiveness and prepare benchmarks and standards 4.3 Data is reviewed for accuracy, completeness and reliability of assumptions in liability projections
5 Review tax compliance	5.1 The achievement of performance indicators is assessed and reviewed against key result areas 5.2 Taxation preparation processes are monitored and reviewed in line with professional taxation and accounting standards requirements 5.3 Failures in compliance are analysed to diagnose shortcomings and to remedy processes in line with taxation authorities requirements

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Tax liabilities	may include • State Government charges, eg, payroll taxes • Income Tax (including Corporate Tax and Capital Gains Tax) • Fringe Benefits Tax • superannuation requirements • instalments • withholdings • LCT, WET
Taxable transactions	may include • income • purchases • payments • capital gains • superannuation payments • financial adjustments, eg, write offs, revaluations • allowable deductions
Obligations	may include • lodgement dates • supporting documentation • explanatory statements • repayment schedules
Standard accounting techniques	may include • discounted cash flows • deprival asset valuations • rates of return • pay back periods • impact statements • pro-rata and percentage apportionment • direct allocation • forecasting techniques
Data	may include • budgets and forecasts • financial statements and reports • market valuations

	• Australian Bureau of Statistics (ABS) economic data • financial markets monitoring services, eg, Reuters • credit ratings • revenue and sales
Methods of determination	may include • income assessment • forecasted income • superannuation contributions • fringe benefits assessments • sales receipts • investment income
Tax bases	may include • employees • revenue gathering practices • superannuation • salaries
Financial management strategies	may include • cost recoveries • budget absorption • purchases • adjustment of borrowings • asset liquidation • long term investments
Record keeping systems	may include • invoices • purchase orders • requisitions • receipts • periodic updates, eg, daily, transaction based, monthly • centralised and decentralised recording • classification by account type • classification by account performance • recording authorities
Management processes	may include • decision making authorities • expenditure authorities • signature approvals • program responsibilities • lending approvals

Variances	may include • budget expenditures • profit and losses • rate of investment returns • unit costs
Assumptions	may include • expenditure limits • productivity levels • cash and business returns • market share growth • competitors' behaviour • regulatory stability
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to implement tax plans and evaluate tax compliance • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ determine range of applicable taxes ○ identify histories of liabilities and payments ○ document transactions to identify permissible deductions and allowances ○ estimate impact of taxation liabilities on cash flows and profits in order to meet liabilities ○ schedule timetables for payment and returns ○ develop financial strategies and plans
Interdependent assessment of units	• This unit must be assessed after the attainment of competency in the following unit(s) ○ FNBACC02B Prepare income tax returns • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Note: As stipulated by the Tax Agents Registration Board, the taxation knowledge components only of this accounting unit of competency must be tested through written examination. All other components can be assessed as advised in the Assessment Guidelines section of this package ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Range of acceptable practices required to obtain deductions under relevant tax Legislation, eg, Capital Gains Tax, Income Tax ○ Principles of internal control (including statutory requirements) ○ Principles of valuation and common methods of depreciation ○ Detailed knowledge of formats required for submission of statutory returns ○ Methods and principles of accrual accounting ○ Ethical considerations for preparation of returns, eg, disclosure • Required skills ○ Forecasting techniques ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Report writing and preparation ○ Numeracy skills for calculation of revenues and payments ○ Research skills to identify valuations and applicable professional standards
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit

	- Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC12B	IMPLEMENT ORGANISATIONAL IMPROVEMENT PROGRAMS
FIN	Finance

DESCRIPTION: This unit covers the competency to analyse and promote organisational improvements in resources management.

ELEMENT	PERFORMANCE CRITERIA
1 Review programs	1.1 Program costs and estimates are compared with budget allocations and financial projections 1.2 Impact of revenue, cost and operational changes on program together with project completion costs plus program objectives are analysed and estimated using standard financial analysis and resources management techniques 1.3 Program outcomes and performance are evaluated against objectives to identify variations, contingencies and scope for review and development 1.4 Financing options including costs and timeframes, and expected returns are assessed against program goals and objectives
2 Contribute to strategic development	2.1 Long term financial and resources management objectives are developed to support organisational goals and aims 2.2 Trends and environmental factors are identified through consultation and using standard financial analysis and resource management techniques 2.3 Realistic assessments are made of financial and resource management implications of external influencing factors on future objectives and present position 2.4 Organisational strengths and weaknesses are evaluated against external relationships and environmental factors
3 Develop options for improvement	3.1 Causes of variations in projected organisational outcomes are identified and appropriate contingency plans are developed and implemented to minimise losses 3.2 Organisational plans are regularly reviewed to encompass changes to operational environment and assess factors influencing achievement of objectives 3.3 Improvement options are identified and evaluated against organisational weaknesses
4 Establish systems to support change	4.1 Strategic reviews monitor program allocations including analysis of resource management needs, information technology needs and management processes 4.2 Expenditures and revenue items are monitored to ensure compliance with budget and variations identified 4.3 Aims and goals of identified changes are communicated systematically to staff and personnel using recognised communication processes and techniques 4.4 Information on changes is readily available and procedures and guidelines are developed to promote absorption of changes into organisational practices

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Financial projections	may include • forecasts, eg, annual, quarterly • sales and revenues • tax liabilities • employee costs • profits and losses • rates of returns
Standard financial analysis techniques	may include • cost benefit analysis • 'what if' analysis • time series • bivariate and multivariate analysis
Standard resource management techniques	may include • process analysis • activity analysis • material resource planning and programming • scenario planning • business process re-engineering • benchmarking • value added management
Financial options	may include • cost recoveries • budget absorption • purchases • adjustment of borrowings • asset liquidation • long term investments
Long term financial objectives	may include • debt retirement • self financing • downsizing • expansion • unit cost reduction

	• sales targets
Environmental factors	may include • inflation • competitors behaviours • market share • consumer demand • skill shortages • technology trends
Organisational strengths and weaknesses	may include • recording systems • work practices • attitudes to risk • market profile • decision making authorities • skill profiles • debt to equity ratio
Variations in outcome	may include • budget expenditures • profits and losses • rate of investment returns • unit costs • sales and revenues • throughout times • response times • quality measures
Improvement options	may include • technical change • organisational change • process redesign • total quality management • debt rescheduling • cash flow monitoring • recruitment • cost benefit analysis • external advice
Management processes	may include • internal reporting • sign-off authorities • program responsibilities • lending approvals

Expenditure and revenue items	may include • revenue producing expenditures • discretionary expenditures • 'stay in business' expenditure • supplier payments • sales • commissions • fees
Recognised communication processes and techniques	may include • staff meetings • newsletters • memos • documented procedures and staff manuals • workshops • task forces • cross functional teams
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to implement organisational improvement programs • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable in the learners work environment • In particular, assessment must confirm the ability to ○ plan and negotiate changes in operational procedures to promote financial and resource accountability ○ establish benchmarks for assessment of processes ○ evaluate trends in performance ○ diagnose shortcomings in processes ○ prepare estimates ○ communicate information
Interdependent assessment of unit	• This unit must be assessed after attainment of competence in the following unit(s) ○ Nil • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of cost benefit analysis ○ Principles of internal control (including statutory requirements) ○ Principles of resource management ○ Knowledge of recording and information management systems ○ Knowledge of planning techniques, eg, SWOT analysis techniques ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Sound knowledge of financing options ○ Ethical considerations for compliance • Required skills ○ Recording, gathering and consolidating financial and resource information ○ Planning skills for scheduling and timetabling implementation ○ Capacity to maintain confidences and operate with discretion ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Report writing and preparation ○ Numeracy skills for calculation of data
Resource implications	• Physical resources - assessment of this competency requires ○ resources appropriate for this unit • Human resources — assessment of this unit of competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry

	through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC13B	CONDUCT INTERNAL AUDIT
FIN	Finance

DESCRIPTION: This unit covers the competency to evaluate the efficiency and effectiveness of information systems, assess the organisation's risks and risk responses and develop plans for implementing improved systems.

ELEMENT	PERFORMANCE CRITERIA
1 Evaluate information systems	1.1 System specifications are evaluated against user requirements and feedback to identify redundancies and constraints, and capacities of information technology 1.2 Hardware and software needs are identified from assessment of available products and services 1.3 Possible uses and handling of accounting data are evaluated in consultation with users to determine security requirements 1.3 Organisational procedures and policies are analysed to evaluate scope of strategies for risk management, internal control of expenditure and compliance with statutory requirements 1.4 Enquiries regarding use of systems are monitored and recorded to ensure ongoing evaluation
2 Develop implementation plans	2.1 Principles, procedures and processes arising from internal control systems are examined to determine implementation issues relevant to organisational processes 2.2 Strengths and weaknesses of organisational processes, including present and future capacities are analysed and incorporated in the implementation plan 2.3 Implementation is designed to cover outcomes, resource use, costs and the achievement and maintenance of professional accounting standards 2.4 Schedules are realistic and feasible in the context of the organisation's short and long term objectives
3 Review resource use	3.1 Sources of data input are monitored to identify influences and variations in returns and costs 3.2 Estimates of stock levels are monitored and reviewed to ensure appropriate stocking and ordering of materials and inventory items 3.3 Records of resource use are compared with unit cost estimates to evaluate projected costs 3.4 Factors influencing resource use in the future are analysed to assess impact on operations and objectives
4 Monitor plans	4.1 Implementation is adjusted to take account of emerging external influences and the establishment of alternative targets 4.2 Costs of plans are monitored and controlled by evaluating net benefits to operations from the allocation of resources 4.3 Internal control systems are adjusted to ensure the maintenance and achievement of accounting standards

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
System specifications	may include • logical data models, eg, data base design • software (upgrades and legacies) • changing needs • client compatibilities • financial analysis functions • processing capacities, eg, system size, speed • networking capacities
Risk management strategies	may include • quantification of risks • periodic reporting • decision making authorities • policy statements • forecasting • comparative analysis
Security requirements	may include • limited personnel access • passwords • encrypted data • read only files requirements • virus scanning • data storage requirements
Internal control systems and procedures	may include • identification, measurement and recording of income, assets, expenditure, liabilities and equity • safeguarding and insurance of assets • decision making authorities • accuracy in valuations • transparency in financial reporting • risk management strategies • compliance testing
Strengths and weaknesses of organisational processes	may include • computer literacy, eg, skills profiles • compliance with internal procedures

	• documented procedures • recording systems • work practices • attitudes to change • decision making authorities
Implementation	may include • testing • feedback • consultation • staged introduction • evaluation • documentation and guidelines • budgeting
Professional accounting standards	may include • applicable accounting standards (Australian Accounting Standards Board [AASB's] and Australian Accounting Standards [AAS's] where alternative AASB's are unavailable) • Australian Auditing Standards (AUS's) • Auditing Guidance Statements (AUG's) • ethical requirements • Superannuation Industry (Supervision) Act 1993
Long and short term objectives	may include • budgetary targets, eg, quarterly, half yearly, annual • sales and revenues targets • monthly cash flows • investment realisations • client development • profit growth
Sources of input data and documentation	may include • invoices • purchase orders • requisitions • receipts • system reports
Factors influencing resource use	may include • order volume • wastage • misallocation of supplies • hidden costs • business prospecting
The sport and	• covers industry sectors of community recreation, fitness, outdoor

recreation industry	recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge required to conduct internal audits • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular assessment must confirm the ability to ○ set up and maintain a data recording system ○ identify information technology requirements for financial accountability ○ consult and liaise with others to determine system requirements ○ interpret application of financial procedures to assess recording routines ○ plan and schedule the introduction of financial records system
Interdependent assessment of units	• This unit must be assessed after the attainment of competency in the following unit(s) ○ FNBACC06B Implement and maintain internal control procedures • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of internal control (including statutory requirements) ○ Wide knowledge of recording and information management systems and software applicable to financial recording ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Ethical considerations for records and file management, eg, confidentiality • Required skills ○ Research skills for tracing use of financial data ○ Planning skills for evaluating routines for handling data ○ Capacity to troubleshoot information technology systems ○ Timetabling skills for overseeing the introduction of news systems and processes ○ Capacity to identify repeating errors and diagnose problems in financial recording ○ Writing skills for reporting and documenting procedures
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for

	assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC14B	EVALUATE BUSINESS PERFORMANCE
FIN	Finance

DESCRIPTION: This unit covers the competency to determine the performance of an organisation's business operations.

ELEMENT	PERFORMANCE CRITERIA
1 Analyse trends in performance	1.1 Data relating to program and organisational performance are gathered and analysed using standard accounting techniques to identify past, current and future performance 1.2 Variations from targets and divergences from trends are researched and evaluated to determine margins of errors and/or repeating patterns 1.3 Trends in performance are assessed in terms of organisational short and long term objectives
2 Develop performance indicators	2.1 Performance indicators link are developed that link organisational processes, resource uses and organisational objectives to environmental factors 2.2 Performance indicators are developed using processes that are planned, inclusive and realistic within available timeframes and resources 2.3 Components of performance indicators are regularly reviewed for relevance against performance trends and organisational capacities
3 Identify problems for improvement	3.1 Factors inhibiting performance are identified, minimised or eliminated 3.2 Organisational programs are reviewed to include factors that promote performance in line with available resources 3.3 Value is added through the use of standard financial management techniques such as capital budgeting 3.4 Communication strategies are developed and implemented to facilitate the extension of improvement options in line with operational goals and needs

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Data	may include • budgets and forecasts • financial statements and reports • market valuations • Australian Bureau of Statistics (ABS) economic data • financial markets monitoring services, eg, Reuters • credit ratings • investment plans • capital equipment and development plans
Standard accounting techniques	may include • discounted cash flows • deprival asset valuations • rates of return • pay back periods • impact statements • pro-rata and percentage apportionment • direct allocation • ratio analysis • working capital management • capital budgeting
Targets	may include • budgeted expenditures • profits and losses • rate of Investment returns • unit costs • sales • budgeted revenue • working capital levels • asset turnover • capital expenditure management • cost of capital
Short and long term objectives	may include • budgetary targets, eg, quarterly, half yearly, annual • sales and revenues targets • monthly cash flows • investment realisations • client development

	• profit growth • investment levels and returns • asset management
Performance indicators	may include • reports (daily, weekly, monthly, quarterly, half yearly, annual) • compliance with scheduled payment dates • profits and losses • debt reduction targets • investment levels • debt to equity ratios • target cost of capital
Environmental factors	may include • inflation • competitors behaviour • market share • consumer demand • cost of debt • skills shortages • government financial policies • community service obligations
Factors inhibiting performance	may include • financial monitoring • internal procedures • staff skills • information management systems • financial management techniques and tools • client options and interface • market share
Communication strategies	may include • staff meetings • newsletters • memos • documented procedures and staff manuals • workshops
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions

	• workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge to evaluate business performance • Assessment of performance should be over a period of time covering all categories from the Range Statements that are applicable to the learner's work environment • In particular assessment must confirm the ability to ○ analyse and interpret the organisation's financial position ○ prepare forecasts ○ investigate and assess asset performance ○ identify factors inhibiting growth or draining resources from operation ○ plan short and long-term cash flows to meet financial commitments
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ FNBACC03B Manage budgets and forecasts • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of cost benefit analysis and use of forecasting techniques ○ Principles of capital budgeting analysis and investment analysis ○ Options, methods and practices for deductions, benefits and depreciations ○ Ethical considerations, eg, conflicts of interest, confidentiality, disclosure requirements ○ Principles and methods of valuation • Required skills ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Report writing and preparation ○ Numeracy and statistical skills for calculation of data ○ Organisational structures and lines of management authority ○ Estimating, forecasting and assessment skills ○ Reading, interpreting financial statements and reports
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for

	assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC15B	EVALUATE ORGANISATION'S FINANCIAL PERFORMANCE
FIN	Finance

DESCRIPTION: This unit covers the competency to analyse and estimate an organisation's financial position and performance.

ELEMENT	PERFORMANCE CRITERIA
1 Evaluate returns to operations	1.1 Cash flow and profitability patterns are trended to identify current position and expected returns from investments and projected operations 1.2 Averaged returns are disaggregated to assess strengths and weaknesses in organisational performance 1.3 Investment returns are evaluated against risk, profit and capital budget requirements
2 Determine long and short term needs	2.1 Resources required by organisation to meet short and long term obligations are identified and costed using standard financial analysis techniques 2.2 Financial priorities are established and reviewed based on reported performance and identified trends, organisational objectives and expected returns to operations and investments 2.3 Financial options review and analyse a range of possible assets and liabilities to optimise the capital mix required to support operations and trading needs 2.4 Organisational policies and procedures for expenditures and investments are evaluated to ensure relevance to changing personnel profiles 2.5 Debt to equity targets are analysed in terms of organisation's expected performance and established in line with organisational objectives using standard accounting techniques
3 Review performance	3.1 Forecasts are justifiable given observed trends, information, events and assumptions 3.2 Standard errors are calculated to produce levels of accuracy suitable for planning purposes 3.3 Forecasts are reviewed regularly in line with actual performance and alternative sources of information 3.4 Risk strategies are assessed for long-term viability and harmonised with short-term goals and obligations

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Investments	may include • property • shares and securities, preference shares • debentures • plant and equipment • interest bearing accounts
Strengths and weaknesses	may include • cash flow schedules • budget estimates • financial monitoring • unit costs • revenue forecasts • internal control compliance
Risk profile	may include • financial risks • market risks • economic risks • political environment risks
Capital budget requirements	may include • payback • accounting rate of returns • NPV • IRR • EVA • cost of capital
Short term and long term obligations	may include • debt retirement • salaries • periodic payments, eg, leases, loans • taxation payments • superannuation • dividends • capital structure decisions

Standard financial analysis techniques	may include • cost benefit analysis • 'what if' analysis • time series • bivariate and multivariate analysis • break even analysis
Financial priorities	may include • sales targets • revenue estimates • rates of returns • cost minimisation (capital and recurrent costs) • periodic monitoring and transparency of expenditure
Financial options	may include • cost recoveries • budget absorption • purchases • adjustment of borrowings • asset liquidation • long term investments • expenditure re-prioritisation • equity injections
Asset and liabilities	may include • property investments • shares, bonds, securities • loans, leases, debts • plant and equipment • personnel • cash • investments
Organisational policies and procedures	may include • price and exchange parameters • reporting requirements • financial analysis assessments • recording and filing systems • standard financial analysis techniques • financial management manuals
Standard accounting techniques	may include • discounted cash flows • deprival asset valuations • rates of returns • pay back periods

	• impact statements • pro-rata and percentage apportionment • direct allocation • break-even analysis
Risk strategies	may include • quantification of risks • periodic reporting • decision making authorities • policy statements • forecasting • comparative analysis • capital structure
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of analysing and estimating an organisation's financial position and performance • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular assessment must confirm the ability to ○ investigate and assess performance of assets ○ identify factors inhibiting growth or draining resources from operation ○ plan cash flow to meet financial commitments ○ establish criteria for decision making ○ develop financing and repayment schedules
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ FNBACC03B Manage budgets and forecasts • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of cash flow and budgetary control ○ Principles of cost benefit analysis and use of forecasting techniques ○ Principles of internal control (including statutory requirements) ○ Capacity to establish long and short term plans, eg, SWOT analysis ○ Principles of risk management ○ Duties of auditors ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Ethical considerations for compliance ○ Understanding of organisational structures and lines of management authority • Require skills ○ Planning skills for timetabling and scheduling reports and lodgements ○ Recording, gathering and consolidating financial information ○ Researching and identifying applicable accounting standards and decisions ○ Interpersonal skills and communication skills, eg, liaising, listening, consulting ○ Report writing and preparation ○ Numeracy skills for calculation of data ○ Statistics
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human

	resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit ○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC16B	EVALUATE FINANCIAL RISK
FIN	Finance

DESCRIPTION: This unit covers the competency to identify, assess and manage the risks associated with an organisation's cash flow or assets and securities.

ELEMENT	PERFORMANCE CRITERIA
1 Assess financial risk exposure	1.1 Magnitude and volatility of risks are measured to determine the extent of risk exposure and the implications for financial strategies 1.2 Key factors supporting or driving risk exposure are identified and timeframes established to monitor and improve performance 1.3 Short and long term financial outcomes and projections are compared with actual cash flows using standard financial analysis techniques to determine effects on liquidity and budget adjustments
2 Develop risk management processes	2.1 Risk management options include assessments of alternatives, criteria for success, and estimates of long and short-term effects 2.2 Strategies are developed using standard financial analysis techniques to identify financial flows, trends in returns and adjustments in asset values 2.3 Financial recording systems are established to monitor and evaluate changes in market conditions and business needs using a range of data sources 2.4 Risk management strategy optimises the mix of asset structures and liabilities in operations and ensures flexibility to meet changing environments
3 Analyse financial histories	3.1 Financial performance is evaluated using trends and patterns that identify the magnitude and volatility of financial exposures 3.2 Long and short-term financial outcomes are compared with forecasted outcomes to assess variances and parameters in performance and the reliability of financial advice 3.3 Incidents and factors increasing or diminishing financial performance are identified and analysed using standard financial analysis techniques
4 Establish processes to minimise risks	4.1 Recording systems to monitor financial outcomes are developed and reviewed to guide and document decision-making 4.2 Inventories are maintained and established to ensure up-to-date records on the value of assets and liabilities 4.3 The contribution of organisational attitudes to risk taking is assessed and incorporated in risk analysis process 4.4 Parameters for variances in financial outcomes are developed, reviewed and communicated to support financial decision-making

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Types of risk exposure	may include • credit risks • interest rate risks • contractual risks • currency risks • environmental and operational risks
Factors supporting or driving risks	may include • organisational program costs • employment costs • lending and repayment criteria • payment and billing schedules • lending and borrowing environments
Standard financial analysis techniques	may include • capital budgeting • cost benefit analysis • 'what if' analysis • time series • bivariate and multivariate analyses
Risk management options	may include • quantification of risks • periodic reporting • decision making authorities • policy statements • forecasting • comparative analysis
Financial recording and monitoring systems	may include • accrual accounting reporting • transaction recording • operating procedures and manuals • comparative costings • budget reviews • organisational communication processes

Data sources	may include • budgets and forecasts • financial statements and reports • market variations • Australian Bureau of Statistics (ABS) economic data • financial markets monitoring services, eg, Reuters • credit ratings
Asset structures and liabilities	may include • property investments • shares, bonds, securities • loans, leases, debts • plant and equipment • personnel • cash accounts
Variances and parameters	may include • budget expenditures • profits and losses • rate of investment returns • unit costs
Inventories	may include • assets and liabilities • repayment and payment schedules • compliance and completion timetables • cost structures • returns and performance over time
Organisational attitudes	may include • risk aversion • risk taking • risk minimisation • proportional risk management
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology

	• over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	- Assessment must confirm sufficient knowledge of identifying, assessing and managing the risks associated with an organisation's cash flow or assets and securities - Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environments - In particular, assessment must confirm the ability to - assess organisation's approach to financial risk - evaluate asset and capital structures - establish criteria for decision making - develop finance and repayment schedules - evaluate inventories and records
Interdependent assessment of units	- This unit must be assessed after attainment of competency in the following unit(s) - FNBACCA03B Manage budgets and forecasts - This unit must be assessed in conjunction with the following unit(s) - Nil - For the purpose of integrated assessment, this unit may be assessed in conjunction with the following unit(s) - Nil
Required knowledge and skills	- Required knowledge - Principles of risk management and budgetary control - Methods of storing, recording and updating financial information - Principles of internal control (including statutory reporting) - Financial legislation, eg, taxable transactions, reporting requirements - Ethical considerations for compliance - Understanding of organisational structures and lines of management authority - Required skills - Recording, gathering and consolidating financial information - Researching and identifying applicable accounting standards and decisions - Interpersonal skills and communication skills, eg, liaising, listening, consulting - Report writing and preparation - Numeracy skills for calculation of data
Resource implications	- Physical resources - assessment of this competency requires access to - resources appropriate for this unit - Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must - be competent in this unit - be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area - have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework

	(AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statement and contexts applicable to the work environment
Context for assessment	- This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace - This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes - Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	3
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						

FNBACC17B	DEVELOP AND IMPLEMENT FINANCIAL STRATEGIES
FIN	Finance

DESCRIPTION: This unit covers the competency to develop and implement long term plans for the optimisation of financial outcomes for an organisation.

ELEMENT	PERFORMANCE CRITERIA
1 Review data	1.1 Costs of and returns from assets and liabilities are analysed using standard accounting techniques to identify extent of debt and equity financing 1.2 Data identifies net costs of different forms of capital to the organisation 1.3 Asset and liability estimates and valuation criteria are standardised and regularly adjusted in line with changes to environmental factors
2 Determine options	2.1 Long and short-term periods are established for the organisation by reference to strategic goals, cash flow requirements and operational objectives 2.2 Long term financing requirements are identified and costed in line with the organisation's expected revenue returns, cash flows and asset base 2.3 Sources of financing are researched and evaluated to determine compatibility with the organisation's finance strategy 2.4 Investment analysis and financial planning requirements are identified and analysed
3 Implement processes	3.1 Financial plans are structured to meet strategic goals and provide returns within long and short term operational objectives 3.2 Short and long term objectives for organisation's capital structure are developed in line with operational and strategic plans 3.3 Internal control procedures are established in consultation with stakeholders to support implementation and to meet possible emergencies 3.4 Portfolio management techniques are applied
4 Evaluate outcomes	4.1 Interrelationships between long and short-term objectives are monitored to ensure consistency of returns between operational and investment plans 4.2 Costs and returns are assessed to determine ongoing viability of strategy 4.3 Tax efficiency of financial strategy is regularly reviewed to maintain optimal returns from assets

Range Statements

The Range Statements provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. The Range Statements relate to the unit as a whole and helps facilitate holistic assessment. In addition, the following variables may be present for this particular unit of competency:

RANGE STATEMENT	CATEGORIES
Assets and liabilities	may include • property investments • shares, bonds, securities • loans, leases, debts • plant and equipment • employee liabilities, eg, LSL • cash • computer software • stock and account receivable
Standard accounting techniques	may include • discounted cash flows • IRR, NPV • deprival asset valuations • rates of return • pay back break even periods • impact statements • pro-rata and percentage apportionment • direct and indirect allocation
Data	may include • budgets and forecasts • financial statements and reports • market valuations • Australian Bureau of Statistics (ABS) economic data • financial markets monitoring services, eg, Reuters • credit ratings • R.B.A. long term bond rates
Valuation criteria	may include • depreciation rate • market estimates • purchase prices • repayment costs • director's valuation • asset backing • earning capacity • past profits • expected future profits

	• receiver's valuation
Environmental factors	may include • economic conditions and trends • external risks • competitors behaviour • market share • consumer demand • cost of capital • skills shortages • government financial policies • factors markets
Long and short term periods	may include • monthly accounting • quarterly reports • half yearly budgets • annual reporting • tri-annual funding • five year plans
Sources of finance	may include • 'ploughback' • money market • asset sales • bank borrowing (long and short term) • franchising • venture capital • new share releases • government equity injections • debentures
Short and long term objectives	may include • debt retirement • salaries and other employee obligations • periodic payments, eg, leases, loans • taxation payments • superannuation • dividends
Internal control procedures	may include • identification, measurement and recording of revenue, assets, expenditure, liabilities and equity • safeguarding and insurance of assets • decision making authorities • accuracy in valuations • transparency in financial reporting

	• risk management strategies • corporate governance requirements • control of cash
Strategic goals	may include • survival • short term profit • long term profit • liquidity • solvency • growth • market share
The sport and recreation industry	• covers industry sectors of community recreation, fitness, outdoor recreation and sport • significant roles played by activity organisations, industry peak bodies, professional organisations • large volunteer base • high turnover of volunteers • high levels of part time and casual employment • irregular working hours • relatively few professional positions • workforce employed mostly in operational positions • mainly small business or self-employed personnel • slow to take up technology • over 2/3 of the sport and recreation industry have no formal/recognised qualifications • significant reliance upon industry credentials and involvement in the activity itself

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 Statements.

Critical aspects of evidence to be considered	• Assessment must confirm sufficient knowledge of developing and implementing long term plans for the optimisation of financial outcomes for an organisation • Assessment of performance should be over a period of time covering all categories from the Range Statements applicable to the learner's work environment • In particular, assessment must confirm the ability to ○ analyse and interpret organisation's financial position ○ develop short term and long term financing and repayment schedules ○ investigate and assess performance of assets ○ plan adequate cash flows to meet organisational commitments ○ establish criteria for decision making
Interdependent assessment of units	• This unit must be assessed after attainment of competency in the following unit(s) ○ FNBACC03B Manage budgets and forecasts • This unit must be assessed in conjunction with the following unit(s) ○ Nil • For the purpose of integrated assessment, this unit may be assessed with the following unit(s) ○ Nil
Required knowledge and skills	• Required knowledge ○ Principles of risk management and budgetary control ○ Methods of storing, recording and updating financial information ○ Financial legislation, eg, taxable transactions, reporting requirements ○ Ethical considerations for compliance ○ Understanding of organisational structures and lines of management authority ○ Principles of cost benefit analysis and use of forecasting techniques ○ Principles of internal control (including statutory requirements) ○ Methods of financial evaluation • Required skills ○ Interpersonal skills and communications skills, eg, liaising, listening, consulting ○ Report writing, preparation and formatting ○ Reading, interpreting financial statements and reports ○ Planning skills for timetabling and scheduling reports and lodgements ○ Research skills to identify valuations and applicable professional standards
Resource implications	• Physical resources - assessment of this competency requires access to ○ resources appropriate for this unit • Human resources - assessment of this competency will require human resources consistent with those outlined in the Assessment Guidelines. That is, assessors (or persons within the assessment team) must ○ be competent in this unit

	○ be current in their knowledge and understanding of the industry through provision of evidence of professional activity in the relevant area ○ have attained the mandatory competency requirements for assessors under the Australian Quality Training Framework (AQTF) as specified in Standard 7.3 of the <i>Standards for Registered Training Organisations</i>
Consistency in performance	• Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statements and contexts applicable to the work environment
Context for assessment	• This unit of competency must be assessed in the context of a sport or recreation activity. For valid and reliable assessment the sport or recreation activity should closely replicate the work environment. The environment should be safe, with the hazards, circumstances and equipment likely to be encountered in a real workplace • This unit of competency should be assessed through the observation of processes and procedures, oral and/or written questioning on required knowledge and skills and consideration of required attitudes • Where performance is not directly observed and/or is required to be demonstrated over a 'period of time' and/or in a 'number of locations', any evidence should be authenticated by colleagues, supervisors, clients or other appropriate persons

KEY COMPETENCIES						
Collect, Analyse & Organise Information	Communicate Ideas & Information	Plan & Organise Activities	Work with Others & in Teams	Use Mathematical Ideas & Techniques	Solve Problems	Use Technology
3	3	3	3	3	3	2
These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices. The three levels of performance (1, 2 and 3) denote the level of competency required to perform the task: 1. Use routine approaches 2. Select from routine approaches 3. Establish new approaches • Collecting, analysing and organising information - • Communicating ideas and information - • Planning and organising activities - • Working with teams and others - • Using mathematical ideas and techniques - • Solving problems - • Using technology - Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.						