



**Australian Government**

# **BSBATSIM416 Oversee organisational planning**

**Release: 1**

# BSBATSIM416 Oversee organisational planning

## Modification History

| Release   | Comments                                                                             |
|-----------|--------------------------------------------------------------------------------------|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

## Application

This unit describes the skills and knowledge required to oversee the development of plans to guide the operations of the organisation.

It applies to individuals who are responsible for monitoring, guiding and planning the activities of Aboriginal and Torres Strait Islander organisations.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

## Unit Sector

Regulation, Licensing and Risk – ATSI Governance

## Elements and Performance Criteria

| ELEMENT                                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>                                                                                                                                                                                                                                                                                                                            |
| 1 Gather relevant planning information           | 1.1 Consult with community to identify needs, issues, visions and interests<br>1.2 Identify people with appropriate expertise both within and outside the organisation who could assist the planning process<br>1.3 Identify and obtain relevant planning information, including the organisation's current provision of services<br>1.4 Review the effectiveness of this provision in meeting organisational and community needs |
| 2 Set directions for planning                    | 2.1 Work with board members to set or review the vision, goals and objectives of the organisation<br>2.2 Seek support of internal or external experts if required                                                                                                                                                                                                                                                                 |

| ELEMENT                                                        | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                | 2.3 Analyse and use information to make planning decisions<br>2.4 Identify type of planning activity required to meet needs of the organisation<br>2.5 Identify key purpose and essential components of the planning activity<br>2.6 Clarify roles of board, management and staff in the planning activity                                                                                                                                                                        |
| 3 Ensure plans and planning processes meet cultural objectives | 3.1 Check plans and planning processes to ensure they maintain and enhance cultural identity<br>3.2 Check plans and planning processes to ensure they reflect cultural requirements and protocols promoting cultural respect<br>3.3 Develop strategies to address areas where conflict may occur between cultural and economic requirements<br>3.4 Check plans to ensure they reflect the vision and objectives of the organisation                                               |
| 4 Oversee development of plans                                 | 4.1 Work with board members and senior staff to establish a plan-development process and timeframe<br>4.2 Ensure adequate resources are available to develop plans<br>4.3 Ensure plans meet legal and compliance requirements<br>4.4 Ensure plans meet financial targets and funding requirements<br>4.5 Ensure plans include risk management strategies<br>4.6 Ensure plans include consideration of sustainability<br>4.7 Monitor plan development and adjust where appropriate |
| 5 Approve plans                                                | 5.1 Work with other board members to approve agreed plan for implementation<br>5.2 Communicate approved plans to the community                                                                                                                                                                                                                                                                                                                                                    |

## Foundation Skills

*This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.*

| Skill | Performance Criteria | Description |
|-------|----------------------|-------------|
|       |                      |             |

|                            |                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reading                    | 1.2-1.4, 2.1, 2.3-2.6, 3.1, 3.2, 3.4, 4.1, 4.3-4.7, 5.1                   | <ul style="list-style-type: none"> <li>Gathers, interprets and analyses textual information from a range of sources and synthesises ideas and concepts</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Writing                    | 1.1, 2.1, 2.2, 4.1, 5.1, 5.2                                              | <ul style="list-style-type: none"> <li>Researches, develops and documents strategies relating to planning and overseeing the operational plan</li> <li>Ensures vocabulary, grammatical structures and conventions are appropriate for target audience</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Oral Communication         | 1.1-1.4, 2.1, 2.2, 2.6, 4.1, 5.1, 5.2                                     | <ul style="list-style-type: none"> <li>Uses appropriate techniques, including actively listening and questioning to convey and clarify information</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Numeracy                   | 4.2, 4.4, 4.6                                                             | <ul style="list-style-type: none"> <li>Selects and uses mathematical problem-solving strategies to organise resource requirements, performance benchmarks and sustainability of the operational plan</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Navigate the world of work | 4.3, 4.6                                                                  | <ul style="list-style-type: none"> <li>Keeps up-to-date with legislation or regulations relevant to own rights and responsibilities and considers implications of these when planning and undertaking work</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Interact with others       | 1.1, 2.1, 2.2, 4.1, 5.1, 5.2                                              | <ul style="list-style-type: none"> <li>Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role</li> <li>Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability</li> <li>Recognises importance of building rapport to establish effective working relationships</li> </ul>                                                                                                                                                                                                                                                                                                                                                          |
| Get the work done          | 1.2, 1.3, 1.4, 2.3, 2.4, 2.5, 2.6, 3.1, 3.2, 3.4, 4.2, 4.4, 4.5, 4.6, 4.7 | <ul style="list-style-type: none"> <li>Applies formal processes when planning more complex tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints and the needs of others</li> <li>In more complex non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and identifying and evaluating best options against predetermined criteria</li> <li>Applies formal problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action</li> <li>Understands and explicitly applies some basic principles of analytical and lateral thinking</li> </ul> |

## Unit Mapping Information

| Code and title<br>current version                 | Code and title<br>previous version                    | Comments                                              | Equivalence status |
|---------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------|--------------------|
| BSBATSIM416<br>Oversee organisational<br>planning | BSBATSIM416A<br>Oversee<br>organisational<br>planning | Updated to meet<br>Standards for<br>Training Packages | Equivalent unit    |

## Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

# Assessment Requirements for BSBATSIM416 Oversee organisational planning

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## Performance Evidence

Evidence of the ability to:

- develop and document plans consistent with community needs, cultural requirements and organisational directions
- identify and access information relevant to planning activity
- identify and document risk management and sustainability strategies.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

## Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain board processes for decision-making
- explain concept of community control of organisations and how it may impact organisational planning
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values and how that could impact organisational planning
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact organisational planning
- outline methods for community consultation and engagement
- list methods for setting vision, goals and objectives
- explain organisation review processes
- identify potential funding sources to support organisational goals and objectives
- describe principles of risk management relevant to organisational planning
- list relevant provisions of federal, state or territory legislation and funding body requirements that influence decision-making and may impact organisational planning
- describe relevant organisational planning concepts
- outline relevant principles of sustainability

- identify relevant protocols and cultural responsibilities with respect to planning
- explain roles and responsibilities of the board and management in organisational planning.

## Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the regulation, licensing and risk – ATSI governance field of work and include access to:

- an actual or simulated board
- organisational plans.

Assessors must satisfy NVR/AQTF assessor requirements.

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