



Australian Government

BSBATSIW416 Obtain and manage consultancy services

Release: 1

BSBATSIW416 Obtain and manage consultancy services

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 obtain and manage consultancy services.

It applies to individuals who are responsible for obtaining and managing external experts to assist in the activities of the organisation.

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 Establish need for external advice	1.1 Identify required expertise not available within the organisation 1.2 Identify potential funding sources to purchase outside expertise
2 Prepare terms of reference	2.1 Form a management group to oversee the project 2.2 Prepare terms of reference (consultancy brief) for consultant services 2.3 Identify and include opportunities for paid community involvement where appropriate
3 Select consultant	3.1 Advertise terms of reference for consultancy 3.2 Establish a process for short-listing, including appointment of

ELEMENT	PERFORMANCE CRITERIA
	selection panel 3.3 Select most suitable applicant according to the organisation's requirements, policies and procedures 3.4 Ensure successful and unsuccessful applicants are advised of outcome and provided with feedback 3.5 Ensure appropriate procedures are in place to document selection process and outcome
4 Develop contract	4.1 Obtain legal advice on contract requirements 4.2 Ensure a draft contract is prepared in accordance with legal advice outlining what is required of the consultant
5 Brief consultant	5.1 Clarify the board's requirements with consultant 5.2 Negotiate final details of project with consultant, including expectations of performance and outcomes 5.3 Ensure contract is finalised and signed 5.4 Familiarise consultant with the organisation and its personnel
6 Monitor consultant's performance	6.1 Check reports are received from consultant according to contractual requirements 6.2 Evaluate reports against agreed outcomes and follow up issues where required 6.3 Participate in performance reviews against contract requirements 6.4 Ensure progress payments are made against milestones and key performance indicators 6.5 Ensure final payment is made when contract requirements have been met

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	1.1, 1.2, 2.2, 2.3, 4.1, 4.2, 5.3, 6.1-6.4	Evaluates and integrates facts and ideas to construct meaning from a range of text types

Writing	2.2, 2.3, 3.1-3.5, 4.2, 5.3, 6.2	Integrates information from a number of sources and develops content that support purposes and format of the material, using clear and logical grammatical structure and appropriate language
Oral Communication	2.1, 3.4, 4.1, 5.1, 5.2, 5.4, 6.2, 6.3	- Uses active questioning and listening to elicit information and confirm understanding - Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate relevant information to a variety of individuals
Numeracy	1.2, 6.4, 6.5	Interprets numerical information and makes basic calculations to manage resources and consultant's fees
Navigate the world of work	3.3, 4.1, 4.2, 6.1	Monitors adherence to legal requirements and organisational procedures and considers own role in terms of its contribution to broader goals of work environment
Interact with others	2.1, 3.2, 3.4, 4.1, 5.1, 5.2, 5.4, 6.2, 6.3	- Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders to share information or negotiate shared outcomes - Cooperates with others as part of familiar routine activities and contributes to specific activities requiring joint responsibility and accountability
Get the work done	1.1, 1.2, 2.1, 2.3, 3.2, 3.3, 3.5, 6.2	- Develops plans to manage relatively complex, non-routine tasks with an awareness of how they may contribute to longer-term operational and strategic goals - Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and identifying options to make decisions - Recognises and addresses some unfamiliar problems of increasing complexity within own scope, recognising when to seek expertise of others

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBATSIW416 Obtain and manage consultancy services	BSBATSIW416C Obtain and manage consultancy services	Updated to meet Standards for 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 BSBATSIW416 Obtain and manage consultancy services

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Performance Evidence

Evidence of the ability to:

- obtain appropriate consultancy services that meet legal and organisational requirements
- monitor and review consultant's performance against relevant criteria
- provide feedback on consultant's performance.

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 concept of community control of organisations and how it may impact the selection of a consultant
- describe cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how this might impact the selection of a consultant
- outline development and typical content of terms of reference, milestones and performance indicators
- explain equity and diversity principles as they apply to consultant selection
- identify external skill or competency needs required by the organisation
- describe various forms of contract and contractual obligations for consultants
- identify geographic, social, economic and political contexts in which particular organisations operate and how these may impact the selection of a consultant
- explain recruitment and selection process in relation to obtaining consultancy services
- outline relevant protocols and cultural responsibilities when engaging a consultant
- identify sources of legal advice available and how they can be accessed.

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:

- participation on an actual or simulated board
- examples of situations where boards may seek consultancy services
- examples of relevant documents.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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