



Australian Government

BSBRKG608 Plan management of records over time

Release: 1

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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 determine the breadth and depth of a collection of records and to develop strategic and implementation plans for the management of records over time.

It applies to individuals who use specialist knowledge, analytical skills and problem-solving techniques to support business operations. The individual may have responsibility for a team or sole responsibility for their work within the business system.

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

Unit Sector

Knowledge Management – Recordkeeping

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. Determine policies and strategies for management of records over time	1.1 Develop strategies to manage storage and access records, in accordance with industry standards and taking into account available resources 1.2 Develop strategies in the context of organisational culture, including migration and preservation strategies 1.3 Determine boundaries of the collection from identified recordkeeping requirements for the jurisdiction 1.4 Determine records storage and usage requirements from available documentation and observe organisational behaviour to enable monitoring against the strategic plan

ELEMENT	PERFORMANCE CRITERIA
	1.5 Identify other parties who create or use records which require storage and factor these into estimates 1.6 Develop a vital records strategy that includes the criteria for vital records and the allocation of responsibility in case of a disaster 1.7 Incorporate vital records strategy into the wider organisational disaster management strategy after approval by appropriate authority
2. Develop strategy and implementation plan for managing records over time	2.1 Review existing internal and external documents which may impact on the transfer of custody and responsibility for records 2.2 Confirm that recordkeeping jurisdictions of the organisation include boundaries of accountabilities from documentation relevant to the transfer of ownership or custody of records 2.3 Specify and document requirements for the transfer of custody, ownership and responsibility 2.4 Specify nature of agreements with receiving bodies or individuals, including rules for negotiation, minimum requirements of legal custody, and signatories to the agreements 2.5 Clearly and logically document rules for the transfer of custody, ownership, and responsibility of records in accordance with organisational requirements
3. Manage preservation of records over time	3.1 Develop records collection strategies and policies which reflect the collecting institution's strategies and directions, and potential changes in operating environments 3.2 Ensure collections strategies reflect evaluation of collection use and availability of alternative formats for resource sharing and in-house collection, as well as access to records from remote sources 3.3 Determine boundaries for the collection, and negotiate commonalities or overlaps of jurisdiction and common boundaries between collecting institutions 3.4 Manage selection, acquisition and disposal of collection material to make best use of staff knowledge, expertise and resources 3.5 Establish processes for the receipt of donations and bequests under legal deposits, policy or other directives, and review the collection taking into account collection strategies, policies and disposal 3.6 Initiate and respond to cooperative collection projects where

ELEMENT	PERFORMANCE CRITERIA
	mutual benefits can be gained

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	1.3, 1.4, 2.1, 2.2,	Analyses and evaluates complex textual information to identify organisational practices, and to discern the values of information, documents and manuscripts
Writing	1.1-1.7, 2.3-2.5, 3.1, 3.3, 3.6	Prepares and compiles logically structured documents and reports using organisational formats to convey clear information about complex relationships and processes
Oral Communication	3.3, 3.6	- Uses collaborative techniques to consult and negotiate requirements with a range of internal and external stakeholders - Uses clear language, terminology and concepts relevant to audience and purpose
Numeracy	1.1, 1.4, 1.5, 3.4	Performs calculations and uses mathematical problem-solving techniques to estimate and analyse data relating to cost, quantity, volume and time.
Navigate the work of work	1.1-1.3, 2.4, 2.5, 3.5	- Uses understanding of organisational and legislative and regulatory requirements to develop strategies to manage records - Understands how own role contributes to broader goals of the work environment
Get the work done	1.1-1.4, 1.6, 1.7, 2.1, 3.1-3.6	- Develops plans to manage relatively complex, non-routine tasks with an awareness of how they contribute to longer term operational and strategic goals - Makes a range of critical and non-critical decisions in relatively complex situations, taking into account a range of constraints - Recognises and addresses some unfamiliar problems of increasing complexity within own scope - Supports new ideas on the basis of their contribution to the achievement of broader goals

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBRKG608 Plan management of records over time	BSBRKG608B Plan management of records over time	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 BSBRKG608 Plan management of records over time

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Performance Evidence

Evidence of the ability to:

- develop and document records management policies, procedures and strategies
- document a recordkeeping plan
- develop strategies that ensure records are preserved.

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:

- outline the key provisions of legislation, regulations, standards and documentation that affect management of records
- outline the general principles and processes of records management and records management systems, such as:
 - systems of control
 - records continuum theory
 - mandate and ownership of business process
- describe key organisational policies, strategies and procedures, particularly those relating to records access and security
- outline recordkeeping policies, strategies, functions and structures in the jurisdiction
- discuss social and cultural trends which impact on how records are kept.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the knowledge management – recordkeeping field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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