



Australian Government

Department of Education, Employment and Workplace Relations

BSBATSIM507B Establish and maintain a strategic planning cycle

Release: 1

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Modification History

Unit Descriptor

This unit covers the planning process to assist Board members develop and implement a strategic planning cycle.

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

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Application of the Unit

This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of organisations in the Indigenous community.

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Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 Define planning	1.1 Clarify the need to plan and how to proceed 1.2 Identify and document outcomes of what is to be achieved 1.3 Include the community and staff in the planning process
2 Develop a map of the organisation	2.1 Define and document client groups and target activity areas 2.2 Discuss and document organisational resources 2.3 Identify and document service allies and competitors 2.4 Identify, discuss and document positive and negative changes in the wider community
3 Clarify the philosophy, beliefs and values of the organisation	3.1 Explain and document the importance of organisational philosophy 3.2 Identify and document values within the organisation 3.3 Ensure an agreed philosophy statement is discussed, documented and endorsed by the Board

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| 4 | Develop the organisation's vision statement | 4.1 Outline and agree on a vision statement and its importance |
| | | 4.2 Develop and document a draft vision statement |
| | | 4.3 Ensure the draft vision statement is reviewed, amended and endorsed by the Board |
| 5 | Develop organisational objectives | 5.1 Explain and document the importance of organisational objectives |
| | | 5.2 Develop and draft objectives for key aspects of the vision |
| | | 5.3 Identify and document realistic outcome statements |
| | | 5.4 Ensure objectives are reviewed and endorsed by the Board |
| 6 | Develop strategies and an action plan | 6.1 Discuss and illustrate strategies and the action plan |
| | | 6.2 Identify and document special factors which may affect success |
| | | 6.3 Develop and document strategies for each objective |
| | | 6.4 Develop a broad action plan for 3-5 years |
| | | 6.5 Ensure the overall plan is reviewed and endorsed by the Board |
| 7 | Evaluate the plan | 7.1 Discuss the evaluation of the plan and document future processes |
| | | 7.2 Review, amend as required and document the vision, objectives, strategies and the action plan |

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

Oral and written communication

Ability to work in a team

Cross-cultural competence, including gender and disability

Evaluation and decision-making

Negotiation

Required knowledge

Cultural context - Boards are upholders of traditional and cultural values. Relevant aspects of culture may include: cultural protocols, language (both Traditional and Aboriginal English), Aboriginal learning styles, cultural business, family and community responsibilities and local history

Community control - community participation and control in decision-making are central to organisations and the role of Boards is to support the community in these processes

Location and resources - organisations operate in diverse locations where cultural, social, economic and political conditions may vary widely. Also, acute resource shortages may also determine the options available

Legal requirements - organisations operate under provisions of federal, state or territory legislation as legal entities and funding recipients which influence decision-making

Organisation processes

Equity and diversity principles

Code of Conduct

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

Integrated demonstration of all elements of competency and their performance criteria, and

A strategic planning cycle is established and maintained

Context of and specific resources for assessment

Assessment must ensure:

This unit of competency should be assessed through the performance of Board duties, but in the event that there is no opportunity to observe such a performance a simulated environment can be used but such simulation must replicate Board conditions in terms of: performing the task; managing a number of different tasks; coping with irregularities and breakdowns in routine; dealing with the responsibilities and expectations of the Board, including working with others; and transferring competency to other situations

Knowledge and performance to be assessed over time to confirm consistency in performance

Method of assessment

The following assessment method is appropriate for this unit:

Performance of Board duties, or through an accurate simulation of Board duties

Guidance information for assessment

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

All levels of the organisation may include:	Board senior management staff
Organisational resources may include:	people expertise buildings capital equipment political influence
Changes in the wider community may include:	legislation funding sources new competitors
Values may include:	heritage culture community family business practices service / product standards staff management
Vision may include:	long term community goals organisational goals
Objectives may include:	financial services / products human resources Board practices
Strategies may include:	programs

Special factors may include:

community involvement

culture

technical

resources

political

cultural

Form and process of evaluation may include:

types of information

timing

personnel

community involvement

Unit Sector(s)

empty

empt

Competency field

Regulation, Licensing and Risk - ATSI Governance

Regulation, Licensing and Risk - ATSI Governance