



Australian Government

CHCMGT004 Secure and manage funding

Release: 1

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Modification History

Release	Comments
Release 1	This version was released in <i>CHC Community Services Training Package release 2.0</i> and meets the requirements of the 2012 Standards for Training Packages. New Unit.

Application

This unit describes the skills and knowledge required to secure and manage funding for an organisation, program or project.

Workers may be responsible for determining the amount of funding required, identifying funding sources, developing funding proposals and managing ongoing compliance with funding agreements. This role would typically be undertaken by a senior worker or manager.

This unit applies to a range of health and community service contexts and relates to both government and non-government funding and tenders.

The skills in this unit must be applied in accordance with Commonwealth and State/Territory legislation, Australian/New Zealand standards and industry codes of practice.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

Elements define the essential outcomes

Performance criteria specify the performance needed to demonstrate achievement of the element

1. Identify funding requirements and context

1.1 Identify scope and purpose of funding

1.2 Calculate funding requirements, including budget, current funding arrangements and future projections

1.3 Identify potential avenues and sources of funding

1.4 Research and gather information on all potential funding avenues and sources

1.5 Determine if funding requirements are feasible and sustainable

ELEMENT	PERFORMANCE CRITERIA
<i>Elements define the essential outcomes</i>	<i>Performance criteria specify the performance needed to demonstrate achievement of the element</i>
2. Develop a funding submission	2.1 Determine funding source requirements 2.2 Prepare funding submission in accordance with funding source requirements 2.3 Determine optimum method of presenting proposal to identified funding sources 2.4 Seek legal, taxation and regulatory advice when required and ensure submission is checked by appropriate persons to ensure it meets compliance requirements 2.5 Establish how deliverables and outcomes will be evaluated and measured
3. Present proposal and negotiate with funding sources	3.1 Present proposal to funding sources using appropriate presentation methods and techniques 3.2 Negotiate with funding source representatives to clarify terms and conditions of funding agreement 3.3 Evaluate submission to identify strengths and weaknesses to inform subsequent submissions
4. Manage funding agreement	4.1 Finalise funding agreement documentation and circulate to all parties 4.2 Establish procedures to monitor ongoing compliance and reporting requirements in accordance with funding agreement 4.3 Maintain ongoing relations with funding source to ensure mutual satisfaction with funding arrangement
5. Evaluate funding agreement	5.1 Evaluate project outcomes against predetermined measures 5.2 Identify lessons learned and opportunities for continuous improvement 5.3 Identify opportunities for future funding arrangements as appropriate

Foundation Skills

The Foundation Skills describe those required skills (language, literacy, numeracy and employment skills) that are essential to performance.

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53>

Assessment Requirements for CHCMGT004 Secure and manage funding

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Performance Evidence

The candidate must show evidence of the ability to complete tasks outlined in elements and performance criteria of this unit, manage tasks and manage contingencies in the context of the job role. There must be demonstrated evidence that the candidate has:

- identified at least 3 potential sources of funding
- determined the feasibility and sustainability of 3 sources of funding
- developed 1 funding proposals in accordance with funding source requirements

Knowledge Evidence

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the work role. This includes knowledge of:

- funding environment
- organisation funding strategy
- government tender processes
- private and corporate grants and funding
- compliance issues
- appropriate sources and avenues for funding
- types of funding, including:
 - ongoing
 - one-off
 - in kind contributions
 - co-payments
- channels where funding and grant opportunities are publicised
- funding issues and challenges
- relationship between funding and strategic direction or organisation

- feasibility and sustainability principles
- budgets and budget pitfalls
- negotiation techniques

Assessment Conditions

Skills must have been demonstrated in the workplace or in a simulated environment that reflects workplace conditions. The following conditions must be met for this unit:

- use of suitable facilities, equipment and resources, including access to funding information, documentation, technology
- modelling of industry operation conditions

Assessors must satisfy the Standards for Registered Training Organisations (RTOs) 2015/AQTF mandatory competency requirements for assessors.

Links

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