



Australian Government

Department of Education, Employment and Workplace Relations

CHCORG613D Manage organisation's strategic and business planning

Release: 1

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Modification History

Not Applicable

Unit Descriptor

Descriptor

This unit describes the knowledge and skills required to undertake ongoing strategic planning to assist in continual improvement of the service or organisation

Application of the Unit

Application

The skills described in this unit may be applied across a range of community services workplace contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills

This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT

1. Formulate a strategic and business plan

PERFORMANCE CRITERIA

- 1.1 Develop desired direction and goals of the organisation in consultation with relevant *stakeholders* to reflect client needs
- 1.2 Develop *strategic plan* on basis of information obtained through research into client needs, resource requirements, interests of key stakeholders and business viability
- 1.3 Formulate *financial plan* to estimate cash flow *projections*, provide budgetary information and define implementation/service plans
- 1.4 Formulate work/service plan aimed at supplying services that meet client expectations and satisfy quality assurance criteria
- 1.5 Ensure plan identifies options for service delivery in accordance with budgetary constraints, human resource requirements, client requirements and agency objectives
- 1.6 Develop promotional strategies to communicate benefits of the service to clients
- 1.7 Develop risk management strategies according to agency needs
- 1.8 Ensure all aspects of business plan are mutually supportive

ELEMENT

2. Apply the strategic and business plan

PERFORMANCE CRITERIA

- 2.1 Implement appropriate operational and revenue control systems and routinely evaluate their ability to provide systematic support to the agency
- 2.2 Identify systems and key performance indicators and targets and use them to monitor agency performance and client satisfaction
- 2.3 Clearly communicate the organisation's business plan to relevant stakeholders and staff to ensure their understanding and support
- 2.4 Design/redesign and implement appropriate organisation structures to optimise achievement of organisation goals and stakeholder expectations

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

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 identified work role

These include knowledge of:

- Importance of principles and practices to enhance sustainability in the workplace, including environmental, economic, workforce and social sustainability
- Organisation development and management
- Process re-engineering
- Quality assurance
- Strategic planning principles and approaches

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Use business plan as part of and to assist in improvement of the service or organisation
- Consult with relevant people
- Ensure business plan meets legislative and legal requirements

In addition, the candidate must be able 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 identified work role

These include the ability to:

- Demonstrate effective communication and interpersonal skills including:
 - negotiations
 - language competence required to fulfil the procedures of the organisation/service
 - language used may be English, signing or a community language
 - literacy competence required to fulfil organisation's procedures
 - language used may be English or a community language

REQUIRED SKILLS AND KNOWLEDGE

- numeracy competence required to complete financial plans for the organisation
- Demonstrate effective time management and work planning
- Demonstrate awareness and understanding of effectiveness of individuals and teams in the service

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

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

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
This may include the use of languages other than English and alternative communication systems
- Assessment may take place on more than one occasion but must cover assessment of all aspects of formulating and applying a business plan

EVIDENCE GUIDE

- Access and equity considerations:*
- All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work
 - All workers should develop their ability to work in a culturally diverse environment
 - In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people
 - Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
- Context of and specific resources for assessment:*
- This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged
 - Resource requirements for assessment of this unit include access to:
 - an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment
- Method of assessment:*
- Assessment may include observations, questioning and evidence gathered from the workplace

Range Statement

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. Add any 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.

Strategic plan will depend on:

- Service/organisation philosophy
- Size and scale of the service/organisation
- The client focus and needs
- The community within which it operates
- The level of available funding and the need to raise finance
- The level of risk involved

Strategic plan should include:

- Cash flow forecast
- Income and expenditure statement
- Mission, goals and objectives
- Performance measures
- Quality assurance mechanisms
- Strategies for achieving goals
- Work plans

Financial plan takes account of:

- A review of financial inputs required sources and forms of finance
- Current financial state of the organisation
- Financial performance to date
- Forms of finance including working capital, fixed capital, debt and equity capital
- Projections of likely financial results budgeting
- Risks and measures to manage or minimise risks

RANGE STATEMENT

Sources of finance may be:

- Borrowing/investments
- Commercial activities
- Financial institutions
- Government sources
- Industry sources
- Through donations

Projections may include:

- Cash flow estimates
- Estimates of profit and loss
- Resource requirements

Stakeholders may include:

- Clients
- Community
- Government and/or funding bodies
- Industry associations
- Management
- Providers of finance
- Suppliers of resources
- Workers

Unit Sector(s)

Not Applicable