



Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM4034A Assess and implement strata/community management agreement

Release: 1

CPPDSM4034A Assess and implement strata/community management agreement

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to effectively assess and implement a strata/community management agreement. It requires the ability to negotiate the implementation of the agreement, and monitor and review the implementation process.

The unit may form part of the licensing requirements for persons working in the property industry, including in the real estate, business broking, stock and station agency and property operations and development sectors, in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of those involved in assessing and implementing strata/community management agreements.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the required performance needed to demonstrate achievement of the element. Where <i>bold italicised</i> text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

1 Determine client and agreement requirements.

- 1.1 Management agreement and **client needs** are reviewed to establish implementation requirements according to **organisational requirements**.
- 1.2 **Owner responsibilities**, management fees and implementation requirements are negotiated and confirmed with **relevant people** according to organisational requirements.
- 1.3 **Legislative, ethical and procedural requirements** relevant to strata/community management **services** are identified and accessed according to client needs and organisational requirements.
- 1.4 Registered plans are reviewed to ensure accuracy and relevance of information and are disseminated to relevant people for **feedback**.
- 1.5 Specific insurance requirements are identified and appropriate arrangements made as required according to client, organisational and legislative requirements.
- 1.6 Appropriate security arrangements for the management of property and facilities are identified and applied according to organisational and legislative requirements.
- 1.7 Additional **resource** requirements are determined according to management agreement and budget allocations.

2 Implement and monitor agreement.

- 2.1 Implementation progress is systematically monitored and variations to work schedules are agreed with relevant people according to organisational requirements.
- 2.2 Expenditure and resource usage are monitored and recorded to ensure implementation objectives are achieved within budget parameters.
- 2.3 Common property and facilities are maintained and protected according to management agreement.
- 2.4 Insurance claims and payments are managed according to management agreement and statutory requirements.
- 2.5 Meetings are scheduled and managed according to management agreement and statutory requirements.
- 2.6 Appropriate practices for receiving and handling monies are identified and applied according to organisational and legislative requirements.
- 2.7 Repair and maintenance of buildings and facilities are

ELEMENT**PERFORMANCE CRITERIA**

	arranged according to management and statutory agreement.
3 Maintain records.	3.1 Record management systems are maintained according to organisational and legislative requirements. 3.2 Books of accounts are maintained to accurately reflect relevant transactions and collections of contributions. 3.3 Accurate and timely records and reports of transactions and services provided are maintained. 3.4 Service contracts are produced that provide an accurate record of facilities management and agency trust account disbursements.
4 Review and report on implementation of management agreement.	4.1 Implementation processes and outcomes are reviewed and reported in consultation with relevant people using appropriate communication techniques. 4.2 Suitability of insurance arrangements is reviewed to ensure compliance with agreement requirements according to legislative and organisational requirements. 4.3 Recommendations for improving processes are presented to relevant people according to organisational procedures. 4.4 Business equipment and technology are used to maintain relevant documentation according to applicable OHS and organisational procedures. 4.5 Report on management agreement is distributed to relevant people according to client and organisational requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills:

- analytical skills to prepare costings and budgets, interpret management agreement and evaluate processes
- communication skills to make public presentations, interpret written and oral information, and negotiate and confirm work schedules

REQUIRED SKILLS AND KNOWLEDGE

- computing skills to access the internet and web pages, prepare and complete online forms, lodge electronic documents and search online databases
- interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds and varying physical and mental abilities and to respect individual differences
- organisational skills to undertake trust accounting and bookkeeping functions, arrange property inspections, monitor implementation processes, organise work schedules and prepare reports.

Required knowledge and understanding:

- administration of property usage plans
- business law relating to contracts and property management
- financial management in relation to budgeting and bookkeeping
- lease rights and responsibilities
- limitations of work role, responsibility and professional abilities
- management of administration and sinking funds
- OHS issues and requirements
- organisational and professional procedures
- social and ethical practices and business standards
- property trust accounting and bookkeeping
- relevant federal and state or territory legislation and local government regulations related to:
 - anti-discrimination
 - consumer protection
 - environmental issues
 - equal employment opportunity (EEO)
 - financial probity
 - franchise and business structures
 - industrial relations
 - OHS
 - privacy
 - property sales, leasing and management
- risk management, including insurances
- use and application of statutory forms in property management.

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.

Overview of assessment

This unit of competency could be assessed through practical demonstration of implementing a strata/community management agreement. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.

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

A person who demonstrates competency in this unit must be able to provide evidence of:

- establishing and negotiating agreement requirements through consultation and research, including:
 - factors likely to affect the management of property
 - management fees and services offered
 - necessary record keeping practices
 - omissions or errors within agreements
 - owners responsibilities and expectations
 - security arrangements for management of property and facilities
- implementing and monitoring agreement, including:
 - arranging, managing and recording meetings
 - depositing monies held on behalf of owner corporations
 - liaising with owners or tenants about repairs and maintenance
 - maintaining and protecting condition of common property
 - maintaining relevant statutory records and books
 - managing insurance claims and payments
 - responding appropriately to requests for repairs and maintenance
- knowledge of organisation's practices, ethical standards and legislative requirements associated with implementing strata/community management agreements
- maintaining relevant statutory records and books,

including administrative and sinking funds, by-laws, investments, repairs and maintenance, strata levies and trust accounting

- conducting meetings
- reviewing and reporting on agreement outcomes, including consultation with owners or tenants.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal planner and assessment record book
- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken

in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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. ***Bold italicised*** wording in the performance criteria is detailed below. 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.

Clients may include:

- agents or third parties for owners
- in-house staff and office contractors
- owner corporations, and body corporate and community title groups
- potential and existing owners
- prospective and existing tenants
- strata companies.

Client needs may relate to:

- beliefs and values
- conventions of gender and sexuality
- cultural practices and observations
- cultural stereotypes
- disposable income and financial constraints
- environmental considerations
- language
- physical and mental disabilities
- religious and spiritual observances
- social conventions
- verbal and non-verbal communication.

Organisational requirements may be outlined and reflected in:

- access and equity principles and practice guidelines
- acting in principal's best interests
- agency policies and guidelines
- business and performance plans
- clear communication of services offered and fee for services
- clear negotiation of fees
- complaint and dispute resolution procedures
- declaration of beneficial interest
- goals, objectives, plans, systems and processes
- legal and ethical requirements and codes of practice
- misrepresentation
- mission statements and strategic plans
- OHS policies, procedures and programs

- over-servicing, fixed charges rather than fee for service
 - policies and procedures in relation to client service
 - quality and continuous improvement processes and standards
 - quality assurance and procedure manuals
 - sales, marketing and leasing management procedure manuals.
- Owner responsibilities** may include:
- administrative and sinking funds
 - appropriate levies
 - budgeting
 - building maintenance requirements
 - maintenance of cash flow.
- Relevant people** may include:
- clients
 - colleagues
 - consumers
 - government personnel
 - legal representatives
 - members of industry associations
 - supervisors.
- Legislative, ethical and procedural requirements** may be outlined and reflected in:
- Australian Securities and Investments Commission, Australian Competition and Consumer Commission, and Foreign Investment Review Board requirements
 - Australian standards
 - federal and state taxation requirements
 - consumer protection laws and guidelines
 - court and tribunal precedents
 - environmental and zoning laws affecting access security, access and property use
 - freedom of information
 - home building requirements
 - licensing requirements
 - privacy and confidentiality requirements and laws applying to owners, contractors and tenants
 - public health
 - quality assurance and certification requirements
 - relevant common law
 - relevant federal, and state or territory legislation and regulations affecting organisational operation, including:
 - anti-discrimination and diversity
 - environmental issues
 - EEO

- industrial relations
 - OHS
 - relevant industry codes of practice covering the market sector and industry, financial transactions, taxation, environment, construction, land use, native title, zoning, utilities use (water, gas and electricity), and contract or common law
 - relevant local government policies and regulations
 - strata, community and company titles
 - tenancy agreements
 - trade practices laws and guidelines.
- Services** may relate to:
- property and facilities management for a range of property types
 - residential, commercial and industrial property.
- Feedback** may include:
- formal and informal discussions, reviews and evaluations with:
 - existing and previous clients
 - peers, colleagues and managers
 - information provided by others involved in a professional capacity, both internal and external to the organisation.
- Resources** may relate to:
- materials
 - personnel
 - tools and equipment
 - training
 - transport.
- Record management systems** may relate to:
- administrative and sinking funds
 - by-laws
 - investments
 - repairs
 - strata levies
 - trust accounting.
- Records and reports** may include:
- completed repairs and maintenance
 - electronic or paper-based information
 - logs and journals
 - organisational forms
 - radio and telephone records
 - records of meetings
 - running sheets
 - task allocation sheets.
- Business equipment and technology** may include:
- computers
 - data storage devices

Relevant documentation
may relate to:

- email
- facsimile machines
- internet, extranet and intranet
- photocopiers
- printers
- scanners
- software applications, such as databases and word applications.
- building codes
- licences
- maps
- organisational, industry and other contracts
- permits and plans
- property marketing, sale and lease agreements or contracts
- specifications
- tenancy agreements
- titles.

Unit Sector(s)

Unit sector Property development, sales and management

Competency field

Competency field Property operations and development