



Australian Government

Department of Education, Employment and Workplace Relations

MEM11017B Organise and lead stocktakes

Release: 1

MEM11017B Organise and lead stocktakes

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit covers planning a stocktake, briefing the participants, generating stocktake reports and adjusting inventory documentation.
------------------------	---

Application of the Unit

Application of the unit	This unit applies to organising and leading periodical stocktakes in accordance with enterprise stocktaking policies, practices and procedures. It involves briefing the stocktake participants and reporting on the result. Band: A Unit Weight: 4
--------------------------------	--

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Prerequisite units		
Path 1	MEM11007B	Administer inventory procedures

Employability Skills Information

Employability skills	This unit contains employability skills.
-----------------------------	--

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.
---	--

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan stocktake	1.1. Inventory lists are prepared and distributed. 1.2. Warehouse and/or production areas are allocated to each individual or team assisting in stocktake.
2. Brief participants in stocktake	2.1. Clear directions and appropriate documentation and equipment are provided to each individual or team participating in stocktake.
3. Generate stocktake reports	3.1. Written or computer reports are collected from individuals or teams on stock counts. 3.2. Inventory data is confirmed to match stock levels. 3.3. Stock discrepancy report is prepared and distributed according to standard operating procedure.
4. Adjust inventory documentation	4.1. Inventory documentation is reconciled to match physical stock in accordance with regulatory and operating procedures. 4.2. Stocktake information is reconciled with audit requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

Look for evidence that confirms skills in:

- preparing inventory lists and instructions on procedures to be followed
- entering inventory information onto manual and electronic proformas and standard workplace forms
- analysing and reporting results of stocktakes by manual and electronic means
- performing calculations related to reconciling stocktake records
- using communication skills to effectively instruct/direct stocktake participants

Required knowledge

Look for evidence that confirms knowledge of:

- relevant inventory systems and procedures
- recording systems and procedures

REQUIRED SKILLS AND KNOWLEDGE

- analysis and reporting methods/procedures
- audit processes
- safe work practices and procedures
- hazards and control measures associated with organising and leading stocktakes

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, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

A person who demonstrates competency in this unit must be able to organise and lead a stocktake. Competency in this unit cannot be claimed until all prerequisites have been satisfied.

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

Assessors must be satisfied that the candidate can competently and consistently perform all elements of the unit as specified by the criteria, including required knowledge, and be capable of applying the competency in new and different situations and contexts.

Context of and specific resources for assessment

This unit may be assessed on the job, off the job or a combination of both on and off the job. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by an individual working alone or as part of a team. The assessment environment should not disadvantage the candidate.

This unit could be assessed in conjunction with any other units addressing the safety, quality, communication, materials handling, recording and reporting associated with organising and leading a stocktake or other units requiring the exercise of the skills and knowledge covered by this unit.

Method of assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including direct observation, supervisor's reports, project work, samples and questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

EVIDENCE GUIDE**Guidance information for assessment****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, 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.

Directions

Oral or written instructions, methodology, how to report discrepancies or damaged stock, timelines

Equipment

Calculators, scanners and portable computers

Inventory documentation

Reports on actual stock, damaged stock, out of date stock and discrepancies

Unit Sector(s)**Unit sector****Co-requisite units****Co-requisite units**

Competency field

Competency field	Materials handling
------------------	--------------------