



Australian Government

Department of Education, Employment and Workplace Relations

TAEEDU508A Manage international education financial and administrative processes

Revision Number: 1

TAEEDU508A Manage international education financial and administrative processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide sound financial and administration management across a range of functions in an international education organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
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Application of the Unit

Application of the unit	This unit applies to individuals who manage finances and administration for educational programs in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational training and education, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Prerequisite units		

Employability Skills Information

Employability skills	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

ELEMENT	PERFORMANCE CRITERIA
1. Implement policies and procedures for managing finance and administration	1.1. Identify and contribute to the development of policies and procedures for managing finance and administration 1.2. Apply risk assessment and risk management strategies to managing finance and administration 1.3. Manage finance and administration compliance with organisation policy and procedures and relevant legislation, regulations and codes 1.4. Establish and follow communication processes to give and receive information, including the production of finance and administration reports 1.5. Consult with work and management teams, and other relevant stakeholders in relation to decision making on finance and administration matters 1.6. Review, monitor and implement agreed changes to finance and administration management, in line with organisational policies and procedures
2. Contribute to financial plan development and implementation	2.1. Interpret and apply organisational strategic plan to finance and administration planning and management, in a team environment 2.2. Consult with relevant personnel to gather information for input into financial plan 2.3. Develop financial plan with management team 2.4. Present financial plan for approval, in line with organisational policies and procedures 2.5. Implement approved financial plan 2.6. Periodically review financial plan's accord with organisational objectives and outcomes, and gain approval for adjustments, in line with organisational policies and procedures
3. Source and contribute to the management of financial and funding allocation	3.1. Identify sources of finances and funds 3.2. Identify organisational financial requirements with work and management teams 3.3. Monitor negotiation, financing and funding of contracts, and implement contract processes to finalisation 3.4. Manage finance of the organisation in a team environment, according to organisational procedures and relevant legislation, regulations and codes 3.5. Provide financial reports to relevant personnel, in line with organisational policies and procedures
4. Monitor administration of the	4.1. Contribute to the establishment of procedures for the financial transactions of an international education

ELEMENT	PERFORMANCE CRITERIA
accounting function	organisation, including employee remuneration and contract payments 4.2. Monitor implementation of finance and administration procedures 4.3. Consult with relevant stakeholders with respect to complying with legal requirements for accounting 4.4. Contribute to financial accounting reports produced and presented, in line with organisational procedures
5. Manage student admission processes and fee records	5.1. Monitor admissions processes to ensure compliance with relevant legislation, regulations and codes and organisational policies and procedures 5.2. Monitor accurate completion of admissions documents and database entries, tracking deficiencies and ensuring rectification where required, to meet compliance requirements 5.3. Review admissions policies and procedures to identify ongoing improvements 5.4. Check clients' agreed fee instalments and payment schedules against receipt documents and dates, to facilitate on time collection of correct monies 5.5. Monitor student fee receipt procedures to facilitate correct processing and recording, and bank in correct account, in accordance with relevant legislation, regulations and codes 5.6. Draw down student fees to operational bank accounts according to organisational policies and procedures and relevant legislation, regulations and codes 5.7. Process and verify student fee refunds in accordance with relevant legislation, regulations and codes and organisational refund policy
6. Manage general administration functions	6.1. Manage administration of functions in accordance with work role in the management team and governance requirements 6.2. Consult organisation staff regarding own and work team performance in functional administration 6.3. Receive reports from work team on action taken on identified issues 6.4. Develop reports on administration matters to the management team and for governance related requirements, in line with organisational policy 6.5. Discuss and clearly communicate matters of administration, such as any adjustments to administration policies and procedures, to relevant personnel

ELEMENT	PERFORMANCE CRITERIA
	6.6. Provide support to members of the management team, as required, with education and training systems and financial administration

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders; to manage information and communication processes; to consult and communicate with teams, board or committee of management, and other relevant stakeholders about financial management and administration matters
- initiative and enterprise skills to make referrals to appropriate people or agencies; to manage for quality; to review and adjust policies and procedures
- literacy skills to produce documents and finance-related reports
- numeracy skills to manage financial processes and to actively contribute to financial planning
- planning and organising skills to manage administrative processes; to facilitate implementation of policies and procedures
- problem-solving skills to negotiate with people in issues resolution processes
- self-management skills to prioritise own activities; to supervise the work of others; to schedule and arrange interviews and meetings
- technology skills to use technological and electronic equipment, relevant software applications, telephones, e-communication media.

Required knowledge

- international education industry and the structure and functions of an international educational organisation
- relevant legislative, regulatory and standards compliance requirements in relation to international education, contracts, consumer protection, trade practices, occupational health and safety (OHS), corporations and financial transactions, employment (particularly relating to remuneration) and taxation.

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

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

Evidence of the following is essential:

- establishing and implementing policies and procedures including risk management strategies, to manage finance and administration in an international education organisation
- resolving issues in relation to finance, funding, and administration through appropriate communication, consultation, reporting and, where necessary, referral to legal or accounting external professionals
- knowledge of relevant legislative, regulatory and standards compliance requirements.

Context of and specific resources for assessment

Assessment must ensure:

- access to opportunities to participate in a range of practical exercises and projects
- access to relevant documents.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- evaluation of supervisor's reports on how the candidate manages financial and administrative processes in an international education context
- analysis of projects, case studies, completed records and reports developed by the candidate
- review of financial plan developed with management team
- oral or written questioning to assess knowledge of structure and functions of an international educational organisation
- evaluation of any adjustments made to the financial plan
- review of communication of administration matters

EVIDENCE GUIDE	
	to relevant personnel, such as adjustments to administration policies and procedures.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

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.

Risk assessment and risk management strategies may include:

- ensuring adequate information provision, communication, coaching and training of staff
- ensuring own and subordinate staff compliance with legislative and regulatory requirements, including those for OHS, and organisational policies and procedures
- identifying potential areas of risk, assessing its likelihood and consequences, and identifying adequate controls and mitigation strategies

Relevant legislation, regulations and codes may include:

- Australian and/or international accounting standards
- corporations legislation in relation to financial transactions
- current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
 - anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
 - business compliance relevant to work roles
 - child protection legislation and regulations
 - Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation
 - employment, education and training - relevant to onshore and offshore provision
 - environmental issues
 - ESOS Assurance Fund requirements
 - immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC),

RANGE STATEMENT

	Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices • taxation and employment related legislation
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RANGE STATEMENT	
<i>Relevant stakeholders</i> may include:	• accountants and financial auditors • board or committee of management • chief executive officer, managers, leaders, coordinators • consular staff, government or agency personnel • internal users of purchased goods and services • OHS specialists • overseas agents • owner • parents • personnel authorised to commit the organisation to purchases • specialist personnel involved in purchasing, asset maintenance and finance • students • supervisors
<i>Relevant personnel</i> may include:	• board or committee of management • chief executive officer • senior level managers • team leaders and managers • work team
<i>Admissions processes</i> may include:	• accurately providing services and advice including collection on arrival, accommodation, student orientation programs • administering records management including maintaining current contact details • checking all documentation requirements and entry requirements are met (including visa requirements, payment of correct fees) • compliance with relevant industry codes of practice and national codes in relation to international education • determining and advising of application outcome • generating records manually and using databases such as Provider Registration and International Student Management System (PRISMS), in accordance with external requirements and organisational policies and procedures • receipt and tracking of student applications

RANGE STATEMENT**Work role** may include:

- performance of work tasks, mainly autonomously
- participation in a management team, with responsibility to more senior managers, chief executive officer and/or board/committee

Unit Sector(s)

Unit sector	Educational Administration
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Competency field

Competency field	
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Co-requisite units

Co-requisite units		