



Business Services Training Package Version 7.0

Interpretation Manual

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BSB Business Services Training Package Version 7.0

The BSB Training Package plays a significant role in the vocational education and training (VET) system. Each year 350,000 Australians enrol in a BSB Training Package qualification (NCVER, 2020). At the time of publication, more than 1,700 registered training organisations (RTOs) have one of these qualifications on their scope of registration.

During an extensive two-and-a-half year review, Version 7.0 of the BSB Training Package was developed. The updates to this Training Package better support learners and employers through more relevant qualifications and units of competency, resulting in more work-ready graduates and better occupational outcomes for learners.

The review was carried out in two project streams, one addressing transferable (or business enterprise) skills and the other addressing priority technical skills.

For more information on the review please refer to the Case for Endorsement document, available for download from [VETNet](#).

Introduction to this Manual

This Interpretation Manual has been developed to support RTOs with transitioning to Version 7.0 of the BSB Training Package. The release of the updated Training Package requires many RTOs to refresh their training materials and to apply to the Regulator to update their scope of registration.

The aim of this Manual is to provide clear and consistent advice to RTOs on how requirements within units of competency may be contextualised for a workplace environment. This Manual provides trainers and assessors with insight from industry practitioners, peak bodies and other RTOs that will assist with creating meaningful and effective support material for learners. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.

The information in this Manual is offered as supplementary interpretation guidance for the BSB Business Services Training Package Version 7.0. The interpretations and advice in this Manual are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to RTOs and training providers.

The interpretation guidance in this Manual is current at the time of publication, **October 2020**.

PwC's Skills for Australia acknowledges that this project was funded by the Australian Government Department of Education, Skills and Employment.



Frequently Asked Questions

To accompany the release of Version 7.0 of the BSB Training Package, a series of public information sessions were held in October 2020. This section reflects some of the questions frequently raised by members of the public during those sessions.

1. Now that an updated version of the BSB Training Package has been released, what do RTOs need to do?

Changes to qualifications may require RTOs to update training delivery to align to the updated Packaging Rules. Changes to units of competency may also require RTOs to refresh their training materials.

An extended 18-month transition period applies to all training products that have been updated as part of this review. The transition period begins on the date the Training Package was released (October 2020) and ends 18-months thereafter (April 2022).

Prior to the transition end date, either: (a) the learner's training and assessment must be completed and the relevant AQF certification documentation must be issued; or (b) the learner must be transferred into the updated version of the training product. Refer to [Clauses 1.26 and 1.27 of the Standards for RTOs](#).

RTOs may also be required to apply to the Regulator to update their scope of registration (see below).

2. Do I need to do anything to have the updated qualifications added to my scope of registration?

RTOs should refer to the 'Qualification Mapping Information' field on training.gov.au to determine whether the updated version of a qualification has been deemed Equivalent or Not Equivalent to its superseded version. Information on equivalence is also set out in the Companion Volume Implementation Guide (CVIG), available for download from [VETNet](#).

Where a qualification is Equivalent to its superseded version, that qualification will automatically be added to the RTO's scope of registration. Where the qualification is Not Equivalent to its superseded version, RTOs will be required to apply via the Regulator to get the updated qualification on scope.

3. If I model my training and assessment on the the advice in this Interpretation Manual, will it be deemed compliant in the event of an audit?

Whilst the information in this Manual represents the view of PwC's Skills for Australia, it may not reflect the position taken by ASQA, VRQA or TAC in the event of an audit. Guidance in this Manual will not be determinative in an audit.

RTOs should consider the guidance in this Manual in conjunction with the requirements set out in the [Standards for RTOs](#).

4. In this Manual, why is interpretation guidance provided for some (but not all) requirements of a unit of competency?

The content for each unit of competency reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.

If you feel that additional items would benefit from interpretation guidance, please contact us at info@skillsforaustralia.com.

5. Will PwC's Skills for Australia provide advice on nominal hours for units of competency?

PwC's Skills for Australia is the Skills Service Organisation (SSO) responsible for supporting the [Business Services Industry Reference Committee](#) with the review and development of the BSB Training Package. Our remit as an SSO does not extend to matters of training delivery, such as nominal hours. For this reason we do not provide advice on nominal hours for units of competency.

As a matter of practice, interested stakeholders often refer to the guidance set out in the [Victorian Purchasing Guides](#).

6. I deliver a qualification that has superseded BSB units of competency listed in the Packaging Rules. Do I need to transition and deliver the updated version of these units?

RTOs are required to continue delivering the units of competency that are listed in the Packaging Rules of the qualification on training.gov.au. The requirement to transition does not apply where a superseded unit of competency is specifically listed in a qualification.

Refer to [Clause 1.27 of the Standards for RTOs](#).



Frequently Asked Questions (cont.)

7. How is an updated qualification deemed Equivalent or Not Equivalent to its superseded version?

The equivalence of qualifications is determined in accordance with Section 3.4. of the [Training Package Products Policy](#). In short, where a qualification is superseded and the 'occupational outcome' of the qualification has not changed, the updated qualification ought to be deemed Equivalent to its superseded version.

This section of the Policy allows the Industry Reference Committee to exercise discretion in determining whether the occupational outcome of the qualification has changed, and therefore whether the qualification must be deemed Not Equivalent.

In some instances, an Industry Reference Committee may choose to apply one or more rules of thumb to help determine qualification equivalence. Some indicators of non-equivalence may include: increasing/decreasing the total number of units in the qualification, changing the composition of core units (e.g. by adding or removing units), or adding/removing Entry Requirements. None of these factors are determinative.

A substantiation of the determination of equivalence or non-equivalence of all training products in BSB Version 7.0 can be found in the Modification History tables in the Companion Volume Implementation Guide (CVIG), available for download from [VETNet](#).

8. Have updates been made to the Work Health and Safety qualifications as part of BSB Version 7.0?

The Work Health and Safety qualifications (BSB30719, BSB41419, BSB51319, BSB60619) were recently reviewed, with updated versions of these qualifications released on training.gov.au in August 2019.

As part of BSB Version 7.0, the elective unit lists of these qualifications have been refreshed to incorporate units of competency that have been updated as part of this review. This constitutes a 'minor change' to the qualification (ref. Section 6.2. of the [Training Package Development and Endorsement Process Policy](#)) and therefore does not impact RTO scope.

RTOs ought to begin delivering the updated elective units in accordance with the transition requirements mandated by the [Standards for RTOs](#) (ref. Question 1 of this FAQ).

Given that the qualifications were not in scope for the BSB Version 7.0 review, no change has been made to the structure of the qualifications or any core units, nor were changes made to any 'BSBWHS' units of competency.

9. What are the cross-sector units of competency? (Section 25 of this Manual, p. 691)

Many of the skills most valued by industry cut across multiple sectors of Australia's economy. However, training package components are not always developed in a way that recognises the importance of skills in multiple sectors or encourages training products to be used to their full potential in various industry contexts. The Australian Industry and Skills Committee (AISC) has identified several cross-sector skills areas where opportunities exist to create flexible and transferable training package components that will benefit industry, learners and the broader VET sector. These cross-sector skills are at the forefront of growth and innovation in Australia.

The intention of the cross-sector training products is for industries and training package developers to import these units of competency into industry relevant qualifications in a manner that suits the job roles in those industries. Consequently, these units have been written in a way that allows for contextualisation to different industries.

More information on the cross-sector skill areas addressed by the BSB Training Package is set out in the Companion Volume Implementation Guide (CVIG), available for download from [VETNet](#) (refer to pp. 133-136).



Summary of qualification pathways in BSB Training Package Version 7.0

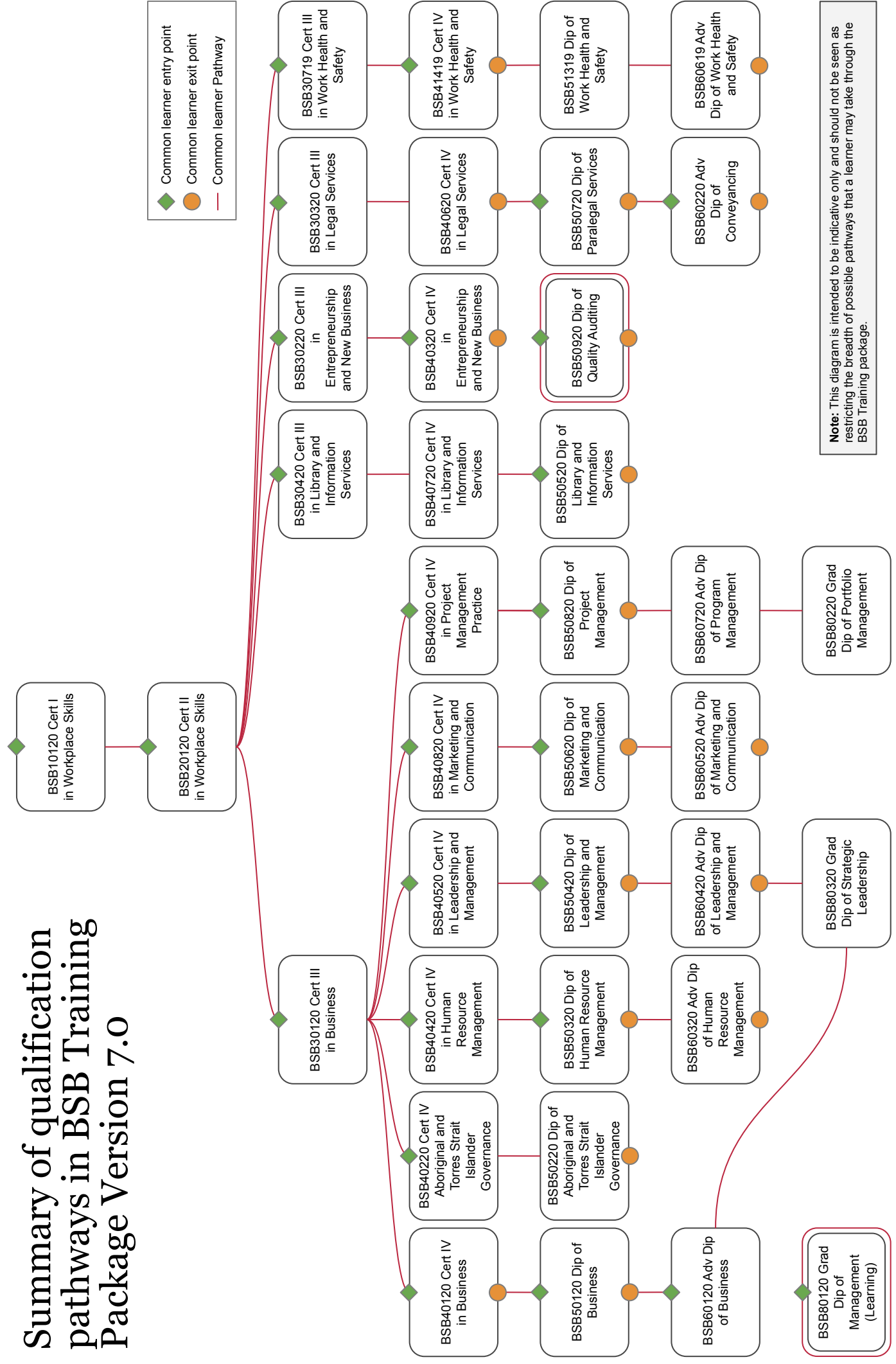




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Aboriginal and Torres Strait Islander Governance

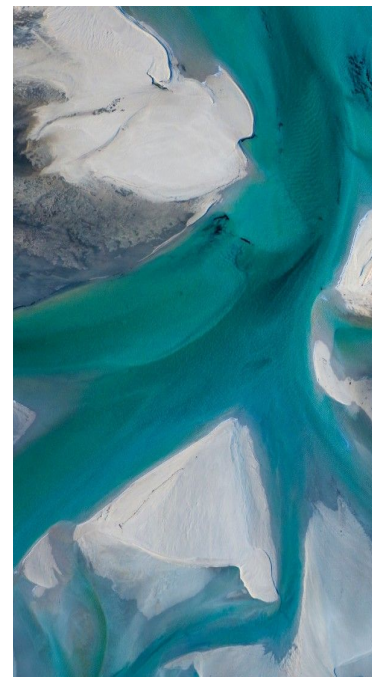
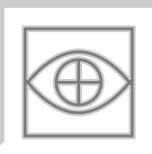
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Aboriginal and Torres Strait Islander Governance Unit Sector Overview

The Aboriginal and Torres Strait Islander Governance unit sector incorporates specialist units of competency aimed at leading, monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations (and/or Indigenous Corporations).

This unit sector aims to support individuals with cultural obligations to their community as well as legal and financial obligations to the wider community and funding bodies.



Glossary of common terminology

Community controlled organisations (CCO)

An Aboriginal Community Controlled Organisation (ACCO) is an incorporated Aboriginal organisation, initiated, based in and governed by, the local Aboriginal community to deliver holistic and culturally appropriate services to the Aboriginal community that controls it.

Cultural protocols

Cultural protocols refer to the customs, lore and codes of behaviour of a particular cultural group and a way of conducting business. It also refers to the protocols and procedures used to guide the observance of traditional knowledge and practices, including how traditional knowledge is used, recorded and disseminated.

SWOT

SWOT stands for strengths, weaknesses, opportunities and threats.

Aboriginal and Torres Strait Islander Governance Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Aboriginal and Torres Strait Islander Governance' unit stream, please refer to the interpretation guidance provided on pages 3 - 43. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



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BSBATSIC411 Communicate with the community

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Use <i>formal and informal community networks</i> to share information	<p>Formal and informal community networks may include:</p> <ul style="list-style-type: none"> • forums • community meetings • community noticeboards • open board meetings • open days • newsletters and notices • site visits.
2.1 Provide information to the community about the organisation's activities according to <i>established protocols</i>	<p>Established protocols may relate to:</p> <ul style="list-style-type: none"> • gender matters • land matters • privacy and confidentiality.
3.2 Invite <i>individuals and groups</i> affected by <i>issues</i> to participate in <i>community forums</i>	<p>Individuals and groups may include:</p> <ul style="list-style-type: none"> • community groups • Elders • government representatives • men, women, youth, people with disabilities • Traditional Owners. <p>Community forums may include:</p> <ul style="list-style-type: none"> • community meetings • focus groups • open houses • social events • workshops.
Performance Evidence	Notes
Present information in an <i>appropriate format</i> for the community	Appropriate formats may include those listed under 'formal and informal community networks' above.
Knowledge Evidence	Notes
Outline <i>community consultation methods</i>	<p>Community consultation methods may include:</p> <ul style="list-style-type: none"> • community meetings • focus groups • interviews • open houses • social events • surveys • workshops.
Assessment Conditions	Notes
Examples of <i>issues considered by boards of governance</i> , including community feedback	<p>Issues considered by boards of governance may relate to:</p> <ul style="list-style-type: none"> • cultural issues (e.g, payback, kinship, humbugging) • environmental, social and governance (ESG) • stakeholder engagement.



BSBATSIC412 Maintain and protect cultural values in the organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Follow accepted <i>cultural protocols</i> when undertaking board duties	<p>Cultural protocols may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.
2.2 Accommodate <i>cultural differences</i> in dealing with other people	<p>Cultural differences may relate to:</p> <ul style="list-style-type: none"> • beliefs and values • ceremonies • employment • language • law and lore • lifestyles • literacy • living conditions.
6.1 Identify <i>areas of potential and actual social conflict</i> as a consequence of stereotyping and prejudice	<p>Areas of potential and actual social conflict may include:</p> <ul style="list-style-type: none"> • family • land • public spaces • schools • workplaces.
7.1 Assess the potential impact of new and proposed <i>legislation and policy</i> on the organisation and its members	<p>Legislation and policy may include:</p> <ul style="list-style-type: none"> • anti-discrimination and equal opportunity laws • extended trading hours • Native Title • pastoral and mining leases • relevant social security law • 'Three Strikes' laws.
8.1 Identify <i>relevant social, technical, economic and political changes</i> that may impact the activities of the organisation	<p>Relevant social, technical, economic and political changes may include:</p> <ul style="list-style-type: none"> • changing technologies • education • land developments • land ownership changes • living standards • mainstreaming services.



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BSBATSIC412 Maintain and protect cultural values in the organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Communication: Participates in a variety of <i>spoken exchanges</i> with people from diverse backgrounds in an effort to maintain and protect cultural values	Spoken exchanges may include: <ul style="list-style-type: none"> • conversations • interviews • meetings • presentations.
Knowledge Evidence	Notes
Explain Aboriginal and Torres Strait Islander <i>cultural governance practices</i> that may affect the effective governance of organisations	Cultural governance practices may include: <ul style="list-style-type: none"> • bush meetings • committee meetings in appropriate language • constitutions recognising Traditional Owners.
Explain how <i>historical factors</i> , such as colonisation, have had an impact on local community members and the organisation	The impact of historical factors may relate to: <ul style="list-style-type: none"> • cultural disintegration • diet and food products • dispossession of land and home • education • employment • loss of control • living standards • personal and vicarious trauma • Stolen Generation.



BSBATSIL408 Manage a board meeting

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>type of meeting</i> to be conducted and any rules, <i>cultural protocols</i> , policies and procedures affecting its planning and conduct	<p>Type of meeting may include:</p> <ul style="list-style-type: none"> • annual general meeting • regular board meeting • special general meeting • subcommittee meeting. <p>Cultural protocols may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.
2.6 Use agreed <i>decision-making processes</i> to ensure decisions reflect participants' views	<p>Decision-making processes may involve:</p> <ul style="list-style-type: none"> • consensus • decision by authority • decision by majority.
3.1 Advise board members when to observe <i>required confidentiality</i>	<p>Required confidentiality may include:</p> <ul style="list-style-type: none"> • commercial in confidence • financial • legal • personal.
5.1 Communicate decisions to <i>relevant people</i>	<p>Relevant people may include:</p> <ul style="list-style-type: none"> • board members • committees • community members • funding bodies • partner organisations • staff • visitors.
5.3 Present <i>reports of outcomes</i> of implementation at board meetings	<p>Reports of outcomes may include:</p> <ul style="list-style-type: none"> • evaluation reports • information reports • progress reports • research reports.



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BSBATSIL408 Manage a board meeting

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Apply <i>constitutional provisions</i> when planning and conducting board meetings	<p>Constitutional provisions may include:</p> <ul style="list-style-type: none"> • elections • financial and other reporting • meetings (e.g. annual general meetings) • membership • objectives.



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BSBATSIL411 Undertake the roles and responsibilities of a board member

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>core functions</i> and <i>structure</i> of the organisation	<p>Core functions may include:</p> <ul style="list-style-type: none"> provision of specific goods, such as catering, art work, performance, and general goods provision of specific services, such as housing, health, employment, child care, legal services, aged care, creative arts, youth services, bookkeeping, resourcing, and coordination specific cultural contexts, such as traditional and cultural knowledge and values. <p>Structure may include:</p> <ul style="list-style-type: none"> board member portfolios of responsibility divisions, branches, departments, teams and positions within the organisation lines of accountability.
1.2 Describe relationship between organisation, <i>stakeholders</i> and <i>other organisations or entities</i>	<p>Stakeholders and other organisations or entities may include:</p> <ul style="list-style-type: none"> clients, consumers and participants commercial businesses owned by the organisation community groups, organisations and networks competitors Elders individual community members jointly owned entities held by other organisations local, state or territory, and federal government departments related Aboriginal and Torres Strait Islander organisations related non-Aboriginal and Torres Strait Islander organisations Traditional Owners trusts held by the organisation.
1.5 Follow the board's <i>decision-making processes</i>	<p>Decision-making processes may involve:</p> <ul style="list-style-type: none"> consensus decision by authority decision by majority.



BSBATSIL411 Undertake the roles and responsibilities of a board member

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Identify the <i>relationship between board and staff</i> and <i>overlapping roles</i>	<p>Relationship between board and staff may relate to:</p> <ul style="list-style-type: none"> board leadership board planning day-to-day administration management responsiveness policy formulation and decision making. <p>Overlapping roles may include:</p> <ul style="list-style-type: none"> board members becoming involved in day-to-day operations staff who are also board members.
3.1 Identify <i>legislation</i> under which the organisation operates	<p>Legislation may include:</p> <ul style="list-style-type: none"> Corporations (Aboriginal and Torres Strait Islander) Act 2006 Fair Work Act Fair Work Regulations 2009 federal, state and territory Acts relating to core functions of the organisation federal, state and territory work health and safety statutes financial legislation and regulations state and territory associations Acts.
4.1 <i>Monitor trends and outcomes</i> in the community	<p>Monitoring trends and outcomes may include:</p> <ul style="list-style-type: none"> attending community meetings gathering information, data and statistics identifying community needs maintaining awareness of political issues.
4.3 Use <i>information</i> provided to review effectiveness and efficiency of operations and associated policy	<p>Information may include:</p> <ul style="list-style-type: none"> anecdotal information from the community data and statistics financial reports reports from staff, consultants, and other bodies.
Foundation Skills	Notes
Writing: Develops <i>material</i> for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations	<p>Material may include:</p> <ul style="list-style-type: none"> emails meeting minutes presentations reports.



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BSBATSIL411 Undertake the roles and responsibilities of a board member

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
<i>Manage conflicts of interest</i>	<p>Managing conflicts of interest may involve:</p> <ul style="list-style-type: none"> • discussion and resolution at board meetings • guidelines for declaring and managing conflicts of interest.
Knowledge Evidence	Notes
Identify relevant <i>protocols and cultural responsibilities</i> , and how they may impact roles and responsibilities of board members	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIL412 Participate effectively as a board member

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Demonstrate respect for <i>local history</i>	<p>Local history may relate to:</p> <ul style="list-style-type: none"> • cultural diversity • defining events (e.g. impacts on community) • economic and social development • Elders • Traditional Owners.
1.2 Identify and follow <i>community protocols</i>	<p>Community protocols may include cultural protocols and may relate to:</p> <ul style="list-style-type: none"> • gender • kinship, clan and family groups • land ownership • men's and women's business • order of speaking • permission to speak • significant events, such as birth, marriage and death • welcome to country and acknowledgements.
1.4 Follow the organisation's <i>code of conduct</i>	<p>Codes of conduct may relate to:</p> <ul style="list-style-type: none"> • declarations of conflict of interest • declarations of pecuniary interest • written or agreed organisation and board codes of conduct.
4.1 Keep up-to-date with <i>local Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander issues</i>	<p>Local Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander issues may relate to:</p> <ul style="list-style-type: none"> • community tension around local issues • competing interests in land • local politics • other developments.
4.2 Identify and undertake cooperative actions involving <i>other groups</i>	<p>Other groups may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander organisations • local businesses • local government • non-Aboriginal and Torres Strait Islander organisations.
Foundation Skills	Notes
Writing: Develops <i>material</i> for a specific audience using clear and detailed language to convey explicit information, requirements and recommendations	<p>Material may include:</p> <ul style="list-style-type: none"> • emails • meeting minutes • presentations • reports.



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BSBATSIL412 Participate effectively as a board member

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Describe relevant <i>protocols and cultural responsibilities</i> impacting performance as a board member	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



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BSBATSIL413 Review and apply the constitution

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Seek clarification of clauses from <i>experts</i> when required	<p>Experts may include:</p> <ul style="list-style-type: none"> • accountants • Elders • federal and state registration bodies • managers • Office of the Registrar of Indigenous Corporations • solicitors • state registration bodies.
2.1 Check constitution to ensure it is consistent with <i>relevant law</i> , with support of experts where required	<p>Relevant law may include:</p> <ul style="list-style-type: none"> • Act or Acts under which the organisation operates • corporation law.
3.1 Follow <i>constitutional provisions</i>	<p>Constitutional provisions may include:</p> <ul style="list-style-type: none"> • elections • financial and other reporting • meetings, including annual general meetings • membership • objectives.
3.2 Check <i>policies and programs</i> to ensure they conform to constitution	<p>Policies and programs may relate to:</p> <ul style="list-style-type: none"> • commercial activities • eligibility for assistance • program objectives.



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BSBATSIM412 Implement a businesslike approach

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Advise <i>relevant stakeholders</i> accordingly	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • communities • funding bodies • other relevant services.
3.1 Review all <i>operations</i> from a <i>businesslike perspective</i>	<p>Operations may include:</p> <ul style="list-style-type: none"> • commercial services • not-for-profit services. <p>Businesslike perspectives may relate to:</p> <ul style="list-style-type: none"> • best use of resources • costs and benefits • quality assurance • influences affecting decision-making • professional versus personal interests • viability and potential growth.
Foundation Skills	Notes
Oral communication: Interacts effectively in <i>verbal exchanges</i> , using active listening and questioning, to convey and clarify information	<p>Verbal exchanges may include:</p> <ul style="list-style-type: none"> • conversations • interviews • meetings • presentations.



BSBATSIM414 Oversee the organisation's annual budget

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Establish a <i>budget working-group</i>	<p>Budget working-groups may include:</p> <ul style="list-style-type: none"> • board subcommittees together with senior management and staff • community members • Elders • external expertise • Traditional Owners.
1.2 Review and analyse previous year's <i>budget performance</i>	<p>Budget performance may relate to:</p> <ul style="list-style-type: none"> • budget variances, such as under or over-expenditure • revenue and expenditure targets.
1.3 Gather budget planning information from <i>relevant sources</i>	<p>Relevant sources may include:</p> <ul style="list-style-type: none"> • accountants • audited financial statements • business managers • funding bodies • treasurer • quotes.
2.1 Identify known <i>sources of income</i>	<p>Sources of income may include:</p> <ul style="list-style-type: none"> • enterprise operations • grant funds • interest on investments • philanthropic income (e.g. sponsorships or donations) • royalties and other payments • service contracts.
2.3 Review <i>expenditure</i> for existing operations	<p>Expenditure may relate to:</p> <ul style="list-style-type: none"> • administration • capital requirements • consultants • distributions • repair and maintenance • salaries • vehicle costs.
2.5 Identify <i>potential problem areas</i>	<p>Potential problem areas may relate to:</p> <ul style="list-style-type: none"> • administration costs • commercial activities (e.g. failure to deliver on contracts) • consultancy fees • salary costs • unresolved debts • utility costs • vehicle and travel expenses.



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BSBATSIM414 Oversee the organisation's annual budget

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Oral communication: Participates in <i>verbal exchanges</i> using clear language, suitable syntax and tone to address and disseminate information to a variety of individuals	<p>Verbal exchanges may include:</p> <ul style="list-style-type: none"> • conversations • interviews • meetings • presentations.
Performance Evidence	Notes
Identify <i>typical information to be included in a budget</i>	<p>Typical information to be included in a budget may include:</p> <ul style="list-style-type: none"> • fixed costs • income • time frames • variable costs.
Knowledge Evidence	Notes
Explain relevant <i>protocols and cultural responsibilities</i> when making budgetary decisions	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIM416 Oversee organisational planning

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult with <i>community</i> to identify needs, issues, visions and interests	<p>Communities may include:</p> <ul style="list-style-type: none"> community members Elders members of the organisation other Aboriginal and Torres Strait Islander organisations other relevant stakeholders Traditional Owners.
1.3 Identify and obtain <i>relevant planning information</i> , including the organisation's current provision of services	<p>Relevant planning information may include:</p> <ul style="list-style-type: none"> community and stakeholder feedback existing organisational plans funding and resource opportunities market research organisational documentation (e.g. annual general reports, constitution, financial reports and budgets, networks and supporters, policies and procedures, vision and purpose statements) relevant data and statistics relevant government reports, strategic directions, and policy staff skills and capabilities.
1.4 <i>Review</i> the effectiveness of this provision in meeting organisational and community needs	<p>Reviews may involve:</p> <ul style="list-style-type: none"> community and stakeholder feedback evaluation reports gap analysis market research SWOT analysis.
2.4 Identify type of <i>planning activity</i> required to meet needs of the organisation	<p>Planning activities may involve:</p> <ul style="list-style-type: none"> action plans business plans cultural plans financial plans marketing and promotion plans staffing plans strategic plans.
3.1 Check plans and planning processes to ensure they maintain and enhance <i>cultural identity</i>	<p>Cultural identity may include:</p> <ul style="list-style-type: none"> common cultural values that underpin Aboriginal and Torres Strait Islander people diversity and uniqueness of individual communities languages, songs and artwork Native Title status and issues relationship with the land.



BSBATSIM416 Oversee organisational planning

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Check plans and planning processes to ensure they reflect <i>cultural requirements</i> and <i>protocols promoting cultural respect</i>	<p>Cultural requirements may relate to:</p> <ul style="list-style-type: none"> • cultural protocols • recognition of diversity. <p>Protocols promoting cultural respect may include:</p> <ul style="list-style-type: none"> • community processes of consultation • local traditions and customs • recognition of Elders and Traditional Owners • respect and courtesy to other communities • rights of others, rights of privacy, and secret business.
4.2 Ensure adequate <i>resources</i> are available to develop plans	<p>Resources may include:</p> <ul style="list-style-type: none"> • board member support • development of working group or subcommittee • external consultants • finances • identified partnerships • information and communication technologies • network contacts • planning expertise • staff.
4.3 Ensure plans meet <i>legal and compliance requirements</i>	<p>Legal and compliance requirements may include:</p> <ul style="list-style-type: none"> • contractual requirements • management of work health and safety • reporting requirements.
4.4 Ensure plans meet <i>financial targets and funding requirements</i>	<p>Financial targets and funding requirements may relate to:</p> <ul style="list-style-type: none"> • budgets • financial obligations • financial viability • funding and service agreements • possible funding options.
4.6 Ensure plans include consideration of <i>sustainability</i>	<p>Sustainability may relate to:</p> <ul style="list-style-type: none"> • cultural factors • economic factors • environmental factors • social factors.



BSBATSIM417 Implement organisational plan

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review organisational plan to identify required <i>resources</i> and <i>funding sources</i>	<p>Resources may include:</p> <ul style="list-style-type: none"> external consultants financial resources human resources physical resources pro bono support technical resources. <p>Funding sources may include:</p> <ul style="list-style-type: none"> business partnerships donations earned income fundraising events government funding and grants membership fees philanthropic grants pro bono work.
1.2 Identify possible <i>partnership arrangements</i>	<p>Partnership arrangements may refer to:</p> <ul style="list-style-type: none"> auspice arrangements partnership with a business partnership with another Aboriginal and Torres Strait Islander organisation partnership with a non-Aboriginal and Torres Strait Islander organisation resource sharing with another organisation.
1.3 Follow <i>organisation's policies, practices and procedures</i> to obtain resources and funding to implement plans	<p>Organisation's policies, practices and procedures may refer to:</p> <ul style="list-style-type: none"> organisational culture organisational guidelines that govern and prescribe operational functions, such as the acquisition and management of financial, human, physical and technical resources standard operating procedures undocumented practices in line with organisational operations.
2.3 Identify <i>key performance indicators (KPIs)</i> for plan implementation and use to monitor progress	<p>Key performance indicators (KPIs) may:</p> <ul style="list-style-type: none"> be used to demonstrate success and identify areas for improvement refer to measures for monitoring and evaluating the efficiency and effectiveness of implementing the plan.



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BSBATSIM417 Implement organisational plan

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.5 Undertake <i>contingency planning</i> in consultation with key stakeholders as required	<p>Contingency planning may refer to:</p> <ul style="list-style-type: none"> changing planned outcomes reducing expenditure rental, hire purchase or alternative means of procurement of required materials, equipment and stock risk identification, assessment and management processes seeking further funding strategies for reducing costs, wastage, stock or consumables succession planning using external consultants and labour.
3.2 Develop strategies to address <i>changing situations</i> when necessary	<p>Changing situations may refer to:</p> <ul style="list-style-type: none"> community needs and markets environmental factors funding sources government policy legislation partner relationships project scope timelines.
Knowledge Evidence	Notes
Outline <i>protocols and cultural responsibilities</i> relevant to development of organisational plans	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander lore acknowledgement of country and elders authority to represent kinship, clan and family groups land ownership matters for discussion men's and women's business relationships with Elders relationships with Traditional Owners responsibilities in relation to significant events, such as births, marriages and deaths use of images and voices welcome to country.



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BSBATSIM418 Oversee financial management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Clarify purpose of <i>financial reports</i> and their key features with board members	<p>Financial reports may refer to:</p> <ul style="list-style-type: none"> • annual audited financial statements • asset registers • balance sheets • bank accounts • budgets • expenditure • income • loans • profit and loss statements.
2.4 Seek <i>independent advice</i> where necessary	<p>Independent advice may be sourced from:</p> <ul style="list-style-type: none"> • accountants • business advisers.
3.1 Identify <i>statutory responsibilities</i> of board members for assets	<p>Statutory responsibilities may relate to:</p> <ul style="list-style-type: none"> • acquittal and annual reporting • fees and taxes • funding agreements • procurement and disposal.
6.2 Identify and monitor <i>external influences</i> on budgets and finances	<p>External influences may include:</p> <ul style="list-style-type: none"> • awards • costs • environmental factors • funding sources • government policy • inflation rate • interest rate • markets • supplies.
Performance Evidence	Notes
Responsibly manage <i>organisational assets</i>	<p>Organisational assets may include:</p> <ul style="list-style-type: none"> • tangible and intangible assets.



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BSBATSIM418 Oversee financial management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
List relevant <i>protocols and cultural responsibilities</i> when making financial decisions.	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



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BSBATSIM419 Contribute to the development and implementation of organisational policies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Work with other board members to establish a <i>policy development group</i> and develop a procedure for policy development	<p>Policy development groups may include:</p> <ul style="list-style-type: none"> • board members • community members • expert advisers • staff members.
2.3 Identify and review <i>additional information</i> required	<p>Additional information may include:</p> <ul style="list-style-type: none"> • examples of policies from other organisations • existing organisational policies • funding terms and conditions • relevant government policy documents • relevant research.
3.1 Provide input into drafting of <i>policy for each area</i> of organisation activity	<p>Policies for each area may relate to:</p> <ul style="list-style-type: none"> • asset management • board processes • complaints • finance • programs and services • training • vision and values • work health and safety • workplace relations.
3.2 Check policy to ensure it reflects the vision of the organisation and <i>cultural issues</i>	<p>Cultural issues may relate to:</p> <ul style="list-style-type: none"> • family obligations • gender • kinship • protection of culture and heritage • protocols • traditional roles and responsibilities.
4.1 Provide an explanation of draft policy to <i>others</i>	<p>Others may include:</p> <ul style="list-style-type: none"> • clients • communities and community members • customers • employees • other organisations.



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BSBATSIM420 Oversee asset management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Follow policies and <i>administrative procedures</i> for purchase, use, storage, maintenance and disposal of assets	<p>Administrative procedures may relate to:</p> <ul style="list-style-type: none"> • asset disposal • identification labelling • insurance • internal audits • invoices and receipts • purchasing • use and control.
2.1 Ensure responsibility for establishing an <i>asset register</i> of organisation's <i>movable assets</i> , and recording and storage of asset documents is delegated by the board to an appropriate person or persons	<p>Asset registers may include:</p> <ul style="list-style-type: none"> • additions • dates of purchase • identifying numbers • insurance claims • location • loss or theft • major repairs • obsolescence • value. <p>Asset registers may be computer-based or manual records.</p> <p>Moveable assets may include:</p> <ul style="list-style-type: none"> • artworks • cultural items • goods • office furniture • plant and equipment • vehicles.
2.2 Ensure the register has been established and appropriate <i>asset documents</i> are stored securely	<p>Asset documents may include:</p> <ul style="list-style-type: none"> • guarantees • insurance documentation • invoices and receipts • maintenance records • titles and certificates • warranties.
Performance Evidence	Notes
Work with <i>others</i> to develop policies and procedures for managing assets	<p>Others may include:</p> <ul style="list-style-type: none"> • colleagues • managers.



Overview

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BSBATSIM420 Oversee asset management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Describe relevant <i>protocols and cultural responsibilities</i> for management of assets	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIM421 Support a positive and culturally appropriate workplace culture

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify and support <i>positive qualities</i> of people	<p>Positive qualities may relate to:</p> <ul style="list-style-type: none"> attitudes and values initiative respect (e.g. for kinship, clan and family obligations, cultural and community festivals and events) skills and abilities.
1.5 Identify how <i>past experiences</i> may impact people's behaviour, skills and knowledge	<p>Past experiences may relate to:</p> <ul style="list-style-type: none"> culture educational opportunities effects of government policies family situations trauma.
2.1 Identify the <i>knowledge, skills and experience</i> of others	<p>Knowledge, skills and experience may include:</p> <ul style="list-style-type: none"> interpersonal skills traditional knowledge and skills work skills. <p>Others may refer to:</p> <ul style="list-style-type: none"> board members community members staff members.
3.2 Develop and apply strategies to recognise <i>achievements</i>	<p>Achievements may include:</p> <ul style="list-style-type: none"> cultural achievements family achievements personal achievements sport achievements work-based achievements.
3.3 Support others to undertake relevant <i>professional development</i>	<p>Professional development may relate to:</p> <ul style="list-style-type: none"> career planning cross-cultural training further education personal development work skills.
6.1 Encourage provision of constructive <i>feedback</i> in workplace	<p>Feedback may be:</p> <ul style="list-style-type: none"> to staff by a board nominee to staff by staff.



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BSBATSIM421 Support a positive and culturally appropriate workplace culture

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
List <i>protocols and cultural responsibilities</i> relevant to the role of a board member	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



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BSBATSIW416 Obtain and manage consultancy services

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify required <i>expertise</i> not available within the organisation	<p>Expertise may relate to:</p> <ul style="list-style-type: none"> • accounting • business development • community planning • legal • planning • research • training. <p>Expertise may involve:</p> <ul style="list-style-type: none"> • evaluating services and procedures • solving major problems • writing policy and procedures • writing submissions.
2.2 Prepare <i>terms of reference</i> (consultancy brief) for consultant services	<p>Terms of reference may include:</p> <ul style="list-style-type: none"> • community aims and involvement • expenses • payment schedules • reporting requirements • required outcomes and key performance indicators • reviews • timelines.
Performance Evidence	Notes
Monitor and review consultant's performance against <i>relevant criteria</i>	<p>Relevant criteria may relate to:</p> <ul style="list-style-type: none"> • meeting agreed budgets and timeframes • number of errors • work quality and outputs.



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BSBATSIW416 Obtain and manage consultancy services

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Outline relevant <i>protocols and cultural responsibilities</i> when engaging a consultant	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.
Identify <i>sources of legal advice</i> available and how they can be accessed	<p>Sources of legal advice may include:</p> <ul style="list-style-type: none"> • community legal centres • lawyers • unions and employer associations.



BSBATSIW417 Select and use technology

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify organisational tasks that could be helped by <i>technology</i>	<p>Technology may include:</p> <ul style="list-style-type: none"> • computer software packages • information technology • new generation plant and equipment.
2.2 Investigate <i>ways of acquiring or accessing technology</i> other than by funding	<p>Ways of acquiring or accessing technology may include:</p> <ul style="list-style-type: none"> • borrowing • leasing and hiring • obtaining donations • partnership arrangements • purchasing.
3.1 <i>Evaluate</i> need for technology training	<p>Evaluating may relate to:</p> <ul style="list-style-type: none"> • effectiveness, including cost effectiveness • human impacts • level of training needs • reliability • suitability • sustainability.
Knowledge Evidence	Notes
List <i>potential barriers to learning</i> , and strategies to address these	<p>Potential barriers to learning may include:</p> <ul style="list-style-type: none"> • distracting office environments • lack of purpose and focus • negative past experiences.
Outline relevant <i>protocols and cultural responsibilities</i> when supporting members of staff	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIC511 Plan and conduct a community meeting

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop a broad agenda and list of invited guests in consultation with <i>appropriate people</i>	<p>Appropriate people may include:</p> <ul style="list-style-type: none"> • Elders • managers • members • Traditional Owners.
1.3 <i>Communicate</i> details of meeting to the community, <i>invited guests</i> and other key people and groups	<p>Communicating may involve:</p> <ul style="list-style-type: none"> • emails • networks • notices • posters • social media • telephone calls • text • word of mouth. <p>Invited guests may include:</p> <ul style="list-style-type: none"> • Elders • government representatives • land councils • members • representatives of local businesses • representatives of other Aboriginal and Torres Strait Islander organisations or communities • Traditional Owners.
1.5 Address requirements of people with <i>special needs</i> to ensure equity and access	<p>Special needs may involve:</p> <ul style="list-style-type: none"> • arrangements for people with disabilities • child care • cultural brokers • interpreters • transport.
2.2 Follow agenda and relevant meeting <i>protocols</i>	<p>Protocols may relate to:</p> <ul style="list-style-type: none"> • agenda formats • introductions, welcomes and acknowledgements • land, gender and clan issues • meeting procedures • minute-taking • order of speakers.
2.3 Acknowledge all points of view through appropriate <i>meeting processes</i> of discussion and documentation	<p>Meeting processes may relate to:</p> <ul style="list-style-type: none"> • decision-making processes • forms of discussion • gender groups • language.
2.6 Manage <i>difficult situations</i> appropriately	<p>Difficult situations may include:</p> <ul style="list-style-type: none"> • absence of consensus • conflict • organisational problems.



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BSBATSIC511 Plan and conduct a community meeting

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Put <i>processes</i> in place to inform appropriate people about what occurred at the meeting and outcomes of proposed action	<p>Processes may include:</p> <ul style="list-style-type: none"> distributing meeting minutes sending out post meeting communications.
Knowledge Evidence	Notes
Outline <i>community consultation methods</i>	<p>Community consultation methods may include:</p> <ul style="list-style-type: none"> community meetings focus groups interviews open houses social events surveys workshops.
Describe relevant <i>protocols and cultural responsibilities</i> for conducting community meetings.	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander lore acknowledgement of country and elders authority to represent kinship, clan and family groups land ownership matters for discussion men's and women's business relationships with Elders relationships with Traditional Owners responsibilities in relation to significant events, such as births, marriages and deaths use of images and voices welcome to country.
Identify relevant <i>community bodies</i> that might be included in community meetings	<p>Community bodies may include:</p> <ul style="list-style-type: none"> funding bodies supporting organisations.



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BSBATSIL503 Manage conflict

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine if conflict exists and its possible <i>causes</i>	<p>Causes may involve:</p> <ul style="list-style-type: none"> • competing groups, family or personal interests and needs • cross-cultural issues • dissatisfaction in the community • interference from outside individuals or organisations, including government and government policies • lack of communication and funding • matters of ownership • personality clashes • power and control issues • unclear roles and responsibilities.
1.2 Identify potential <i>situations of future conflict</i>	<p>Situations of future conflict may be:</p> <ul style="list-style-type: none"> • between the organisation and the community • between the organisation and the wider community • within the board • within the organisation.
2.1 Identify the <i>implications of conflict</i> occurring	<p>Implications of conflict may involve:</p> <ul style="list-style-type: none"> • breakdown in social cohesion • community divisions • impacts on service delivery or business operations • individual and family health and wellbeing • legal implications, such as breach of contracts, duty of care.
2.3 Develop <i>resolution strategies</i> in consultation with conflicting parties	<p>Resolution strategies may involve:</p> <ul style="list-style-type: none"> • community and family meetings • cultural resolution strategies • grievance policies and procedures • listening and respect • mediation • memorandums of understanding • organisational and industry codes of conduct.



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BSBATSIL503 Manage conflict

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Outline relevant <i>protocols and cultural responsibilities</i> that impact how conflict is resolved	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIL510 Appoint and work with a manager

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Obtain expert advice on legal requirements relevant to <i>recruiting and selecting staff</i>	<p>Recruiting and selecting staff may include:</p> <ul style="list-style-type: none"> • advertising • conducting referee and security checks • developing and adapting positions and job descriptions • developing interview questions • developing selection criteria • following established application processes • informing successful and unsuccessful candidates • selecting interview panels • selecting suitable candidates • short-listing applicants • short-listing interviewees.
2.3 Establish a selection panel that represents <i>key stakeholders</i>	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> • board members • community members • Elders • funding body representatives • local government • other Aboriginal and Torres Strait Islander organisations • Traditional Owners.
2.4 Develop appropriate interview questions, using <i>independent assistance</i> as required	<p>Independent assistance may include:</p> <ul style="list-style-type: none"> • consultants • employee groups. • experienced network members • peak body groups • senior government or non-government personnel.
4.2 Develop <i>communication and reporting mechanisms</i> between the manager and the board	<p>Communication and reporting mechanisms may include:</p> <ul style="list-style-type: none"> • manager's report for the annual general meeting • regular written and verbal reports • reports against performance outcomes • standing items at board meetings.
4.3 Develop protocols for decision-making and <i>delegation of powers</i>	<p>Delegation of powers may include:</p> <ul style="list-style-type: none"> • employing and dismissing staff • purchasing goods and services • signing cheques and contracts • speaking to the media.
4.5 <i>Regularly review</i> the manager's performance in accordance with the employment contract	<p>Regular reviews may include:</p> <ul style="list-style-type: none"> • 360 degree feedback • annual performance reviews • assessment against performance outcomes • independent assessments • interviews.



BSBATSIL511 Lead the organisation's strategic planning cycle

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Agree to a documented <i>strategic planning process</i> with other board members	<p>Strategic planning processes may include:</p> <ul style="list-style-type: none"> collecting and documenting information consulting with Elders, Traditional Owners, members and communities developing values, vision and purpose, objectives of strategic plans, strategies for achieving goals and performance measures establishing working groups and subcommittees reviewing draft strategic plans reviewing previous strategic plans.
1.2 Identify and allocate <i>resources</i> to undertake strategic planning	<p>Resources may include:</p> <ul style="list-style-type: none"> board member support community members external consultants finances identified partnerships information and communication technologies network contacts planning expertise.
2.1 Consult board members, management, staff, community and key stakeholders on <i>values, vision and purpose</i> of the organisation	<p>Values may relate to:</p> <ul style="list-style-type: none"> business practices culture communities family heritage self-determination service and product standards staff management. <p>Vision and purpose may relate to:</p> <ul style="list-style-type: none"> long-term community goals organisational goals.
3.4 Identify and analyse <i>emerging and predicted trends</i>	<p>Emerging and predicted trends may include:</p> <ul style="list-style-type: none"> business and social enterprise possibilities community needs and issues demographic changes funding priorities government legislation and policy local expenditure new and changing competitors social trends.
3.5 Identify and analyse potential for <i>strategic alliances and partnerships</i>	<p>Strategic alliances and partnerships may involve:</p> <ul style="list-style-type: none"> Businesses individuals local, state or territory, and federal governments other organisations.



BSBATSIL511 Lead the organisation's strategic planning cycle

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.1 Develop and agree on <i>strategies</i> and <i>SMART objectives</i> with other board members, consistent with outcomes of research and analysis undertaken	<p>Strategies may involve:</p> <ul style="list-style-type: none"> community involvement culture programs. <p>SMART objectives may relate to:</p> <ul style="list-style-type: none"> board practices community development finances human resources services and products. <p>SMART objectives are specific, measurable, achievable, realistic and time-bound.</p>
4.3 Identify and document <i>factors</i> that may affect achievement of objectives	<p>Factors may include:</p> <ul style="list-style-type: none"> community cultural political resources technical.
5.1 Develop an implementation plan with other board members identifying targets, <i>key performance indicators</i> , performance standards, timelines and reporting requirements for the strategic planning period	<p>Key performance indicators may include:</p> <ul style="list-style-type: none"> measures for monitoring and evaluating the efficiency and effectiveness of the plan's implementation measures used to demonstrate success and identify areas for improvement.

Knowledge Evidence	Notes
List <i>data collection methods</i>	<p>Data collection methods may include:</p> <ul style="list-style-type: none"> interviews focus groups questionnaires surveys.
Identify relevant <i>protocols and cultural responsibilities</i> that impact the planning process	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander lore acknowledgement of country and elders authority to represent kinship, clan and family groups land ownership matters for discussion men's and women's business relationships with Elders relationships with Traditional Owners responsibilities in relation to significant events, such as births, marriages and deaths use of images and voices welcome to country.



BSBATSIL512 Be a leader in the community

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Use knowledge and skills to communicate effectively and demonstrate respect for <i>community values</i>	<p>Community values may include:</p> <ul style="list-style-type: none"> • caring for country • importance of family, kin and community • maintenance of culture and heritage • respect for others.
1.6 Identify how personal actions can impact <i>others</i>	<p>Other may include:</p> <ul style="list-style-type: none"> • community members • Elders • staff • Traditional Owners.
2.1 Gather and analyse information on <i>social, cultural and economic needs</i> of all sections of the community	<p>Social, cultural and economic needs may include:</p> <ul style="list-style-type: none"> • education and health • employment • housing • law, lore and ceremony.
2.2 Follow <i>protocols for information sharing</i>	<p>Protocols for information sharing may relate to:</p> <ul style="list-style-type: none"> • land matters • men and women's business • privacy and confidentiality • storage and transfer of information.
5.3 Consider and evaluate other points of view when <i>making clear, rational decisions</i> reflecting community wishes	<p>Making clear, rational decisions may involve:</p> <ul style="list-style-type: none"> • communicating decisions • consensus • consulting with Elders and Traditional Owners • decisions by authority • majority voting.
Knowledge Evidence	Notes
Identify relevant <i>protocols and cultural responsibilities</i> that impact community leadership	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIM505 Control organisational finances

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Establish a structure to undertake regular <i>financial management responsibilities</i> on behalf of the board	Financial management responsibilities may include: <ul style="list-style-type: none"> • approving expenditures • developing a budget • entering into funding agreements • reporting financial information • varying the agreed budget.
2.2 Identify approved <i>signatories</i> for bank accounts	Signatories may include: <ul style="list-style-type: none"> • a combination of board members and management • board members only • management only, within limits.
2.4 Ensure <i>statutory requirements</i> on financial management are followed	Statutory requirements may relate to: <ul style="list-style-type: none"> • acquittal of funds • audited reports • superannuation • taxation, including Goods and Services Tax (GST) • workers' compensation.
2.7 Ensure accepted <i>systems for financial reporting</i> are established and maintained	Systems for financial reporting may include: <ul style="list-style-type: none"> • computer-based systems • manual systems.
5.1 Identify type and content of <i>financial information</i> that can be made publicly available	Financial information may include: <ul style="list-style-type: none"> • annual audited reports • financial projections • monthly income and expenditure figures • project reports.
6.1 Identify reporting requirements by <i>relevant corporate authorities and funding bodies</i>	Relevant corporate authorities and funding bodies may include: <ul style="list-style-type: none"> • government departments • philanthropic trusts • project partners • Office of the Registrar of Indigenous Corporations (ORIC) • state and territory registration authorities • other corporations.
Performance Evidence	Notes
Read and interpret <i>typical organisational financial reports</i>	Typical organisational financial reports may relate to: <ul style="list-style-type: none"> • auditors reports • depreciation schedules • financial performance (profit and loss) • financial position (balance sheets) • half-year reports • statement of cash flows • taxation returns.



BSBATSIM506 Develop employment policies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>employer's responsibilities</i> with respect to staff	<p>Employer's responsibilities may relate to:</p> <ul style="list-style-type: none"> • compliance with state, territory and federal industrial relations legislation • conditions of relevant awards • duty of care • provisions of a safe workplace • supervising • training.
1.2 Develop, negotiate and endorse <i>staffing policies</i> with board members, management and staff, and if appropriate, unions	<p>Staffing policies may relate to:</p> <ul style="list-style-type: none"> • awards and agreements • contracts • disputes, including between management and staff • grievance procedures • health and wellbeing • induction of new staff • performance management • work health and safety • workplace rules and staff discipline.
2.4 Identify and access external <i>industrial relations advice</i> and representation as required	<p>Industrial relations advice may include:</p> <ul style="list-style-type: none"> • counselling • independent workplace audits • mediation • union representation.
2.5 Ensure individual contracts for employees are developed and signed within relevant <i>enterprise agreements</i> or awards according to policies and procedures	<p>Enterprise agreements may relate to:</p> <ul style="list-style-type: none"> • dispute resolution • general employment conditions • minimum rates of pay and conditions • range of positions.
3.1 Establish a <i>review body</i> for staffing policy	<p>Review bodies may include:</p> <ul style="list-style-type: none"> • board subcommittees • external expertise • joint management and staff working-groups.
3.2 Monitor and assess outside <i>industrial influences</i> and impacts relevant to the organisation	<p>Industrial influences may include:</p> <ul style="list-style-type: none"> • award changes • changes to legislation • changing technologies • union involvement.
3.5 Ensure all aspects of employment policy and procedures are <i>audited</i> independently	<p>Audits may include:</p> <ul style="list-style-type: none"> • external quality auditors • staff meetings • surveys • work health and safety audits.



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BSBATSIM506 Develop employment policies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Outline relevant <i>protocols and cultural responsibilities</i> that might impact employment policies	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIM511 Develop enterprise opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 <i>Evaluate current business activities</i> on viability and future potential	<p>Evaluating of current business activities may refer to:</p> <ul style="list-style-type: none"> capital requirements community motivation cultural appropriateness human resources market availability risk.
2.1 Canvass the community for <i>business ideas and options</i>	<p>Business ideas and options may include:</p> <ul style="list-style-type: none"> establishing an independent business operation establishing commercial arrangements with local government and private operators tendering for supply of services.
2.3 Identify and analyse potential <i>markets</i>	<p>Markets may include:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander consumers local, regional, state or territory, national and international consumers and organisations.
2.4 Obtain information from <i>business services</i> on business development	<p>Business services may include:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander legal services business development networks government business information services industry associations local operators.
4.1 Establish <i>structures</i> to action business plans	<p>Structures may relate to:</p> <ul style="list-style-type: none"> board members, community representatives, business and finance advisers, industry advisers capital requirements core businesses future directions income and expenditure projections legal structures management, staffing and boards market strategies.



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BSBATSIM511 Develop enterprise opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
List relevant <i>protocols and cultural responsibilities</i> that might impact development of enterprise opportunities	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIM514 Recruit and induct staff

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review <i>staffing requirements</i> on a regular basis	<p>Staffing requirements may relate to:</p> <ul style="list-style-type: none"> casual paid staff contract paid staff full-time paid staff part-time paid staff voluntary staff.
1.3 Update <i>recruitment policy and procedures</i> regularly	<p>Recruitment policies and procedures may refer to:</p> <ul style="list-style-type: none"> employment of local community members, family and kin recruitment and selection processes volunteer registers.
2.1 Establish a <i>recruitment committee</i>	<p>Recruitment committees may include:</p> <ul style="list-style-type: none"> board members community members Elders independent advisers senior staff Traditional Owners.
2.3 Inform others of <i>job vacancies</i>	<p>Job vacancies may be advertised through:</p> <ul style="list-style-type: none"> Aboriginal and Torres Strait Islander news outlets direct invitations local notices local, state or territory, and national newspapers online word of mouth.
2.5 <i>Notify candidates of results</i> and provide feedback on their applications	<p>Notifying candidates of results may be done:</p> <ul style="list-style-type: none"> by telephone in person in writing.
3.1 Develop formal <i>contract</i> for new employees	<p>Contracts may include:</p> <ul style="list-style-type: none"> award-based contracts verbal or written agreements workplace agreements.
3.3 Implement <i>induction processes</i>	<p>Induction processes may include:</p> <ul style="list-style-type: none"> community profiles job descriptions meeting staff and team members on-the-job training organisational structures policies and procedures roles and responsibilities tour of the organisation.



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BSBATSIM514 Recruit and induct staff

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.1 Assess and record staff <i>development and training</i> needs	<p>Development and training may include:</p> <ul style="list-style-type: none"> • accredited and non-accredited training • career planning • cross-cultural training • mentoring.
6.1 Ensure all contractual obligations and requirements are completed prior to <i>staff departures</i>	<p>Staff departures may refer to:</p> <ul style="list-style-type: none"> • dismissal • redeployment • resignation • retirement • retrenchment.
Knowledge Evidence	Notes
Outline relevant <i>protocols and cultural responsibilities</i> that impact recruitment and induction processes	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIW514 Represent your organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Obtain permission to <i>represent</i> the organisation	<p>Representing may involve:</p> <ul style="list-style-type: none"> • advocating for the organisation • meeting with representatives of government or other organisations • participating in forums, meetings, media interviews and networks • speaking in public forums • writing articles for publication.
1.3 Follow a <i>code of conduct</i>	<p>Codes of conduct may relate to:</p> <ul style="list-style-type: none"> • appropriate behaviours • diligence • honesty • separating personal and professional issues.
3.1 Identify and establish links with individuals, groups and <i>organisations</i> relevant to work of the organisation	<p>Organisations may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander organisations • community-based services • local, state or territory, and federal government departments • non-Indigenous organisations • peak bodies.
3.2 Participate in <i>networks</i> relevant to the organisation	<p>Networks may include:</p> <ul style="list-style-type: none"> • local, regional, state or territory, and national organisations • section-focused organisations (e.g. health, education, justice).
5.1 <i>Inform</i> the community, other organisations, government and businesses about the work and achievements of the organisation	<p>Informing may involve:</p> <ul style="list-style-type: none"> • interviews and news releases • media, both Aboriginal and Torres Strait Islander and mainstream • networks • public meetings.



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BSBATSIW514 Represent your organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Name relevant <i>protocols and cultural responsibilities</i> that impact how the organisation is represented	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



BSBATSIW515 Secure funding

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.4 Ensure a proposal is prepared that meets funding body's objectives, criteria and <i>submission requirements</i>	<p>Submission requirements may relate to:</p> <ul style="list-style-type: none"> • cost developments • demonstrable outcomes • eligibility criteria • meeting timelines • participation of certain groups, such as women and youth.
3.3 Advise <i>key people</i> of progress and outcome of submission	<p>Key people may include:</p> <ul style="list-style-type: none"> • board and committee members • community members • Elders • management and staff • partner organisations • Traditional Owners.
Performance Evidence	Notes
Identify <i>funding sources</i>	<p>Funding sources may include:</p> <ul style="list-style-type: none"> • business partnerships • donations • earned income • fundraising events • government funding and grants • membership fees • philanthropic grants • pro bono work.
Knowledge Evidence	Notes
List relevant <i>protocols and cultural responsibilities</i> that impact how funding is sourced.	<p>Protocols and cultural responsibilities may include:</p> <ul style="list-style-type: none"> • Aboriginal and Torres Strait Islander lore • acknowledgement of country and elders • authority to represent • kinship, clan and family groups • land ownership • matters for discussion • men's and women's business • relationships with Elders • relationships with Traditional Owners • responsibilities in relation to significant events, such as births, marriages and deaths • use of images and voices • welcome to country.



Audit and Compliance

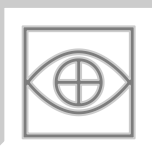
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Audit and Compliance Unit Sector Overview

The Audit and Compliance (AUD) unit sector incorporates specialist units of competency aimed at ensuring compliance and quality in relation to an organisation’s processes and procedures. The compliance requirements and/or subject matter under audit will depend on the industry or workplace context.

Relevant job roles may include lead auditor and quality assurance manager. Individuals may operate as specialist external contractors.



Glossary of common terminology

Auditee	An auditee is an organisation or a part of an organisation that is being audited.
Auditor	An auditor is a person or firm appointed by an organisation to execute an audit.
Code of practice	A code of practice is a document prepared to provide practical guidance on how to comply with a general duty or specific duties according to specified standards or legislation.
Lead auditor	A lead auditor is responsible for leading the audit teams in an organisation.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Audit and Compliance Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the ‘Audit and Compliance’ unit stream, please refer to the interpretation guidance provided on pages 46 - 62. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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Level 6

BSBAUD411 Participate in quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	BSB50120 Diploma of Business
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review own role and <i>responsibilities</i> within quality audit team	<p>Responsibilities may include:</p> <ul style="list-style-type: none"> following instructions and procedures as directed by lead auditor (e.g. collecting and reviewing specific evidence to provide to lead auditor).
1.3 Source required <i>organisational documentation</i> from lead auditor, and <i>check the adequacy of the documentation</i>	<p>Organisational documentation may include:</p> <ul style="list-style-type: none"> specific audit documentation. <p>Checking the adequacy of the documentation may include:</p> <ul style="list-style-type: none"> confirming valid and non-valid documentation and data linking audit requirements to audit objectives.
1.6 Identify aspects of the audit that require the use of <i>specialists</i> and refer to lead auditor	<p>Specialists may include:</p> <ul style="list-style-type: none"> external specialists (e.g. environmental consultants, financial specialists, Safe Work representatives) internal specialists (e.g. operations managers, work health and safety [WHS] specialists, human resources [HR] specialists). <p>Specialists may be accredited and should be current.</p>
2.3 Prepare for <i>possible issues</i> and outline <i>mitigation strategies</i>	<p>Possible issues may relate to:</p> <ul style="list-style-type: none"> access to appropriate assistance and support in the event that an issue arises access to data and other required information cooperation of auditees inconsistencies in documentation. <p>Mitigation strategies may include:</p> <ul style="list-style-type: none"> seeking support from lead auditor.
3.1 Access a range of <i>sources of information</i> relevant to task	<p>Sources of information may include:</p> <ul style="list-style-type: none"> annual reports from relevant organisations and regulatory bodies compliance requirements HR information production information relevant legislation WHS records. <p>Relevant sources of information may be clarified by lead auditor.</p>



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BSBAUD411 Participate in quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	BSB50120 Diploma of Business
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria

Performance Criteria	Notes
4.1 Evaluate information against prescribed <i>benchmarks</i>	<p>Benchmarks may include:</p> <ul style="list-style-type: none"> • completion rates • industry-specific benchmarks • internal policies and procedures • International Organisation for Standardisation (ISO) standards • legislative and contractual requirements.
5.1 Formulate findings and prepare recommendations on corrective actions if discrepancies or non compliances are detected	Note: It is likely that the result of all audits would have a summary of findings and actions.

Foundation Skills

Foundation Skills	Notes
Reading: Identifies and interprets information from <i>organisational documentation</i> and workplace procedures	<p>Organisational documentation may include:</p> <ul style="list-style-type: none"> • legislative and contractual requirements • organisational audit processes.
Technology: Uses <i>digital tools and systems</i> to report audit findings	<p>Digital tools and systems may include:</p> <ul style="list-style-type: none"> • audit management software • cloud-based applications • presentation tools (e.g. PowerPoint, Google Slides) • spreadsheets to track findings • virtual meeting technology • word processing tools. <p>Types of digital tools and systems used may depend on the size of the organisation, as well as the size of the audit.</p>

Performance Evidence

Performance Evidence	Notes
Develop audit plan using <i>tools</i> and <i>strategies</i>	<p>Tools may include:</p> <ul style="list-style-type: none"> • focus groups • surveys. <p>Strategies may include:</p> <ul style="list-style-type: none"> • collecting customer and user complaints • conducting desk audit reviews, including of related policies and procedures • undertaking further research • site visits and observations • tracking non-conformance and non-compliance.



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BSBAUD411 Participate in quality audits**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	BSB50120 Diploma of Business
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Use <i>terminology</i> relating to auditing in written and oral communications	Terminology may include: <ul style="list-style-type: none"> • audit scope, plan, interviews, schedule or report • auditees, auditors and lead auditor • corrective action request (CAR) • exit and entry meetings • non-compliance and non-conformance.
Use predetermined reference criteria to evaluate findings and formulate <i>well-founded objective decisions</i>	Well-founded objective decisions may be: <ul style="list-style-type: none"> • informed by evidence • linked to reference criteria.
Knowledge Evidence	Notes
Current industry <i>products and services</i> that support the auditing process	Products and services may include: <ul style="list-style-type: none"> • those offered by compliance bodies (e.g. Safe Work Australia) • industry policies, procedures, codes and legislation required for compliance in the organisation and sector • ISO standards (e.g. ISO 9001).



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Level 6

BSBAUD412 Work within compliance frameworks

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50920 Diploma of Quality Auditing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and document <i>statutory, legislative and regulatory requirements</i> relevant to job role and industry	<p>Statutory and legislative requirements may include:</p> <ul style="list-style-type: none"> • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation. <p>Regulatory requirements may include:</p> <ul style="list-style-type: none"> • government or organisational regulations • International Organisation for Standardisation (ISO) standards (e.g. 9001) • organisational and industry codes of practice • superannuation regulations • WHS regulations.
1.2 Identify and document <i>organisational and industry requirements</i>	<p>Organisational and industry requirements may include:</p> <ul style="list-style-type: none"> • codes of practice • internal policies and procedures, including those relating to risk management and controls • standards.
2.2 Discuss <i>ethical considerations</i> with <i>relevant stakeholders</i>	<p>Ethical considerations may include:</p> <ul style="list-style-type: none"> • industry-specific ethical considerations (e.g. industry codes of ethics) • privacy and confidentiality • WHS. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. licensing authorities, unions, contractors) • internal stakeholders (e.g. lead auditors).
3.1 Consult with <i>relevant stakeholders</i> and identify procedures to be applied, applicable to work environment and own job role	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. contractors, customers, accountants, government and regulatory bodies, suppliers, unions) • internal stakeholders (e.g. colleagues, management, teams).
Foundation Skills	Notes
Writing: Collates and compiles information gathered from multiple <i>sources</i> in required format for using technical and enterprise specific language	<p>Sources may include:</p> <ul style="list-style-type: none"> • government sources • industry-specific sources (e.g. industry associations) • organisational templates and procedures.



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BSBAUD412 Work within compliance frameworks

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50920 Diploma of Quality Auditing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Sources of information</i> to ensure currency with changes in compliance requirements	Sources of information may include: <ul style="list-style-type: none">• government sources• industry-specific sources (e.g. industry associations)• organisational templates and procedures.
<i>Methods</i> to map compliance requirements	Methods may include: <ul style="list-style-type: none">• compliance tables• flow charts• process flows and mapping.



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BSBAUD511 Initiate quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	N/A
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Determine and agree on audit objectives and scope with auditee and other <i>required stakeholders</i>	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. board of directors, regulatory bodies, shareholders) internal stakeholders (e.g. senior management).
1.3 <i>Identify risks</i> within scope of quality audit	<p>Identifying risks may include:</p> <ul style="list-style-type: none"> looking at historical documentation, such as previous audit results.
2.2 <i>Prepare audit notifications</i> according to organisational protocols	<p>Preparing audit notifications may include using:</p> <ul style="list-style-type: none"> different communication methods based on stakeholder type (e.g. verbal or written) organisational templates.
3.1 Identify <i>resources</i> required to perform the quality audit	<p>Resources may include:</p> <ul style="list-style-type: none"> documentation logistics (e.g. transport, virtual or in-person meetings) physical resources staffing resources.
4.4 Document and submit audit plan to auditee for approval, <i>where required</i>	<p>Where required:</p> <ul style="list-style-type: none"> justification may be required where auditee does not require approval this may be industry-specific.
6.2 Source organisational documentation from auditee, and <i>check adequacy of documentation</i> provided	<p>Checking adequacy of the documentation may include:</p> <ul style="list-style-type: none"> confirming valid and non-valid documentation and data linking audit requirements to audit objectives.
7.1 Develop <i>checklist</i> according to audit scope and objectives	<p>Checklists may include:</p> <ul style="list-style-type: none"> incorporating criteria to be tested against (e.g. benchmarks).



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BSBAUD511 Initiate quality audits**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	N/A
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets and analyses information from <i>organisational documentation</i>	<p>Organisational documentation may include:</p> <ul style="list-style-type: none"> legislative and contractual requirements organisational audit processes.
Technology: Uses <i>digital tools and systems</i> to assist in initiating quality audits	<p>Digital tools and systems may include:</p> <ul style="list-style-type: none"> audit management software cloud-based applications presentation tools spreadsheets to track findings virtual meeting technology word processing tools. <p>Types of digital tools and systems used may depend on the size of the organisation, as well as the size of the audit.</p>
Performance Evidence	Notes
Use <i>terminology</i> relating to quality auditing in communications	<p>Terminology may include:</p> <ul style="list-style-type: none"> audit scope, plan, interviews, schedule or report auditees, auditors and lead auditor corrective action request (CAR) exit and entry meetings non-compliance and non-conformance.
Knowledge Evidence	Notes
Auditing <i>codes of practice and ethics</i>	<p>Codes of practice and ethics may depend on:</p> <ul style="list-style-type: none"> industry what an organisation is being audited against.



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BSBAUD512 Lead quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	N/A
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Interview <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. contractors, customers, accountants, general public, government and regulatory bodies, suppliers, unions) internal stakeholders (e.g. senior management). <p>Relevant stakeholders may vary depending on size and scope of the organisation and audit.</p>
3.1 <i>Supervise activities</i> of audit team members	<p>Supervising activities may include using:</p> <ul style="list-style-type: none"> accountability protocols and procedures a variety of virtual collaboration tools.
4.3 Examine <i>results and findings</i> against audit objectives and present to <i>relevant stakeholders</i>	<p>Results and findings may be in draft form.</p> <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> Chief Executive Officer (CEO) general managers individuals who have organisational responsibility for audit project sponsors.
Foundation Skills	Notes
Reading: Interprets and analyses information from <i>audit scoping materials</i>	<p>Audit scoping materials may include:</p> <ul style="list-style-type: none"> benchmark data industry best practice previous audits standards and compliance requirements an organisation is being tested against.
Numeracy: Uses <i>mathematical calculations</i> to analyse and arrange numeric information	<p>Mathematical calculations may relate to:</p> <ul style="list-style-type: none"> budget and costs resources time.



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BSBAUD512 Lead quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	N/A
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key features of technology</i> required for quality auditing activities for leading a quality audit team	Key features of technology may depend on: <ul style="list-style-type: none"> size of organisation or scope of audit (e.g. a large audit may use technology based on automation and efficiency capabilities).
<i>Strategies</i> to develop performance improvement in audit team members	Strategies may include: <ul style="list-style-type: none"> coaching, mentoring and training implementing process improvement methodologies team debriefs and reflections seeking feedback from auditees (e.g. during exit meetings).



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BSBAUD513 Report on quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	BSB50120 Diploma of Business
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Provide draft report to <i>relevant stakeholders</i> and seek feedback	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • audit committee • management • risk committee. <p>Relevant stakeholders may depend on industry and organisation.</p>
2.4 <i>Present</i> final audit report to auditee and other <i>relevant stakeholders</i>	<p>Presenting may be:</p> <ul style="list-style-type: none"> • written • verbal. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • audit committee • management • risk committee.
Foundation Skills	Notes
Writing: Develops a variety of <i>complex documents</i> using relevant structure, tone and vocabulary <i>appropriate to audience, context and purpose</i>	<p>Complex documents may include:</p> <ul style="list-style-type: none"> • audit reports • communications for report • data reports • graphical information • statistical reports. <p>Appropriateness for audience, context and purpose may be determined with reference to:</p> <ul style="list-style-type: none"> • language • structure • tone.
Technology: Uses <i>digital tools and systems</i> to develop reports in an effective way	<p>Digital tools may include those used to track:</p> <ul style="list-style-type: none"> • deadlines • milestones • timelines. <p>Digital tools and systems may include:</p> <ul style="list-style-type: none"> • audit management software • cloud-based applications • spreadsheets • word processing tools. <p>Types of digital tools and systems used may depend on the size of the organisation and the audit.</p>



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BSBAUD513 Report on quality audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50920 Diploma of Quality Auditing	BSB50120 Diploma of Business
Skill sets	BSBSS00128 Lead Auditor Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Negotiate <i>follow up actions</i> with relevant stakeholders	Follow up actions may include ensuring: <ul style="list-style-type: none"> all corrective action has been taken there are no outstanding actions.
Use <i>terminology</i> relating to quality auditing	Terminology may include: <ul style="list-style-type: none"> audit scope, plan, interviews, schedule or report auditees, auditors and lead auditor corrective action request (CAR) exit and entry meetings non-compliance and non-conformance.
Knowledge Evidence	Notes
Requirements of <i>auditing regulations</i>	Auditing regulations may be specific to the industry and organisation.



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BSBAUD514 Interpret compliance requirements

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing
Skill sets	BSBSS00122 Compliance Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Analyse <i>organisational operations</i> and identify the functions, products and services that may be subject to compliance requirements	<p>Organisational operations may relate to:</p> <ul style="list-style-type: none"> contractual obligations organisational strategic plan organisational structure (e.g. interaction between different departments) regulatory requirements risk management controls.
1.3 Obtain approval of plans from <i>relevant stakeholders</i>	<p>Obtaining approval may include:</p> <ul style="list-style-type: none"> email sign-offs signatures on documents verbal approval. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> boards internal committees senior management. <p>Obtaining approval and relevant stakeholders may depend on the type, size and governance structure of an organisation.</p>
3.1 Discuss and clarify with <i>relevant stakeholders ambiguities</i> and <i>issues</i> experienced in interpreting identified compliance information	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. regulatory bodies) internal stakeholders (e.g. quality teams, team members responsible for compliance). <p>Ambiguities may include:</p> <ul style="list-style-type: none"> interpretation of financial documents, standards and regulations (e.g. application of work health and safety [WHS] regulations). <p>Issues may include:</p> <ul style="list-style-type: none"> complexity of information may be difficult to interpret differences in opinion privacy issues.



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BSBAUD514 Interpret compliance requirements

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing
Skill sets	BSBSS00122 Compliance Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Identifies, interprets, analyses and reviews <i>complex texts</i> from various sources to determine compliance requirements	Complex texts may include: <ul style="list-style-type: none"> contracts relevant legislation.
Technology: Uses <i>digital tools and systems</i> to locate, organise and share information in effective ways	Digital tools and systems may include: <ul style="list-style-type: none"> cloud-based applications presentation tools spreadsheets virtual meeting technology word processing tools.
Performance Evidence	Notes
Reading: Interpret and analyse information from <i>standards, legislation, regulations, industry and organisational codes of practice</i> and determine their relevance to compliance in the organisation	Standards, legislation, regulations, industry and organisational codes of practice may include: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
Knowledge Evidence	Notes
<i>Key sources of information</i> relevant to organisational compliance requirements	Key sources of information may include: <ul style="list-style-type: none"> sources housing relevant standards, legislation, regulations, industry and organisational codes of practice.
Assessment Conditions	Notes
<i>Resources</i> for conducting digital searches.	Resources may include: <ul style="list-style-type: none"> computers databases libraries mobile devices tablets.



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BSBAUD515 Evaluate and review compliance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00122 Compliance Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 <i>Confirm approval of plan from relevant stakeholders</i>	<p>Confirming approval may include:</p> <ul style="list-style-type: none"> email sign offs signatures on documents verbal approval. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> boards internal committees senior management. <p>Confirming approval and relevant stakeholders may depend on the type, size and governance structures of an organisation.</p>
2.4 <i>Arrange evaluation data for analysis</i>	<p>Arranging evaluation data may include:</p> <ul style="list-style-type: none"> cleaning data compiling and collating data preparing data for cleaning.
3.2 <i>Discuss outcomes and findings of the analysis with relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> audit team operational staff and managers other stakeholders directly impacted senior management.
5.6 <i>Distribute report to relevant stakeholders according to evaluation plan</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> audit teams boards internal committees operational staff and managers other stakeholders directly impacted senior management.

Foundation Skills	Notes
Reading: Identifies, interprets, analyses and reviews <i>complex texts</i> from various sources to determine legislative requirements, organisational operations, specific requirements and responsibilities	<p>Complex texts may include:</p> <ul style="list-style-type: none"> industry regulations organisational and industry codes of practice organisational documentation (e.g. flow charts, policies and procedures) relevant legislation.
Technology: Uses <i>digital tools and systems</i> to locate, organise and share information effectively	<p>Digital tools and systems may include:</p> <ul style="list-style-type: none"> cloud-based applications presentation tools spreadsheets virtual meeting technology word processing tools.



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BSBAUD515 Evaluate and review compliance**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00122 Compliance Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Compliance <i>evaluation methods</i>	<p>Evaluation methods may include:</p> <ul style="list-style-type: none"> audits quality checks and reviews. <p>Compliance evaluation methods may depend on the level of risk and the size and scope of the organisation.</p>
<i>Sources of data</i> relevant to compliance requirements	<p>Sources of data may include:</p> <ul style="list-style-type: none"> contracts legislation standards.
Assessment Conditions	Notes
<i>Standards, laws, regulations, industry and organisational codes and standards</i> relevant to compliance requirements	<p>Standards, laws, regulations, industry and organisational codes and standards may include:</p> <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
<i>Resources</i> for conducting digital searches	<p>Resources may include:</p> <ul style="list-style-type: none"> computers databases libraries mobile devices tablets.



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BSBAUD516 Develop and monitor processes for the management of breaches in compliance requirements

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 <i>Monitor</i> and evaluate organisation's operations and compliance management information systems and identify breaches in compliance requirements	Monitoring may relate to: <ul style="list-style-type: none"> demonstrating a plan for how an organisation's operations and compliance information systems may be monitored selecting a time period to monitor.
2.3 Discuss findings with <i>relevant stakeholders</i> and confirm accuracy of compliance assessment	Relevant stakeholders may include: <ul style="list-style-type: none"> management (e.g. senior or within team).
4.2 Seek and <i>action advice</i> from relevant stakeholders on the management of breaches in compliance requirements	Actioning advice may relate to: <ul style="list-style-type: none"> acting on the information received through feedback.
5.1 <i>Monitor action</i> to manage and rectify identified breaches in compliance requirements according to organisational policies and procedures	Monitoring may relate to: <ul style="list-style-type: none"> demonstrating a plan for how to manage and rectify identified breaches in compliance requirements (e.g. milestone and timeline check-ins). Actions may relate to: <ul style="list-style-type: none"> corrective actions taken.
5.2 <i>Confirm success</i> in rectification of compliance breaches and notify relevant stakeholders	Confirming success may relate to meeting: <ul style="list-style-type: none"> required policy and procedure expectations required standards.

Foundation Skills	Notes
Reading: Recognises and evaluates <i>complex texts</i> in various forms to determine key information and specific requirements and responsibilities	Complex texts may include: <ul style="list-style-type: none"> legislation organisational and industry standards organisational policies and procedures.
Technology: Uses a range of <i>digitally based technology and applications</i> to access, organise, integrate and share information	Digital based technology and applications may include: <ul style="list-style-type: none"> cloud-based applications presentation tools spreadsheets virtual meeting technology word processing tools.

Assessment Conditions	Notes
<i>Legislation, regulations, standards and organisational policies and procedures</i> relevant to compliance requirements	Legislation, regulations, standards and organisational policies and procedures may include: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.



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BSBAUD601 Establish and manage compliance management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management
Skill sets	BSBSS00115 Copyright Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Review compliance requirements according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> contractual obligations industry legislative requirements organisational frameworks risk mitigation controls.
3.5 Document schedule for implementing, reviewing and maintaining the planned compliance management system, and distribute to <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> senior management.
4.1 <i>Appoint</i> and distribute information to relevant stakeholders on their compliance management responsibilities	Appointing may relate to: <ul style="list-style-type: none"> locating or sourcing relevant information.
4.2 Establish the components of compliance management system in collaboration with <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> internal team members senior management (particularly in initial stages).
Foundation Skills	Notes
Reading: Investigates and evaluates <i>complex texts</i> to determine key information and specific requirements and responsibilities	Complex texts may include: <ul style="list-style-type: none"> legislation organisational and industry standards organisational policies and procedures.
Uses a range of <i>digitally based technology and applications</i> to access, organise, integrate and share information	Digitally based technology and applications may include: <ul style="list-style-type: none"> cloud-based applications presentation tools spreadsheets virtual meeting technology word processing tools.
Knowledge Evidence	Notes
<i>Standards and legislation</i> relevant to organisational compliance requirements	Standards and legislation may include: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation organisational and industry codes of practice Privacy Act 1988.



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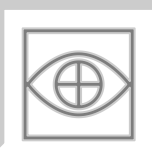
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Verbal Communication Unit Sector Overview

The Verbal Communication (CMM) unit sector incorporates units of competency aimed at supporting individuals to develop necessary verbal communication skills applicable across industries and various job roles.

Effective verbal communication is an essential skill in a workplace environment. Verbal communication may take the form of a conversation, speech or presentation, and be direct or indirect.



Glossary of common terminology

Organisational / workplace policies	Organisational / workplace policies represent an overarching course of action adopted by an organisation.
Organisational / workplace procedures	Organisational / workplace procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Style guides	Style guides refer to standards to ensure consistency in style and format for the design of organisational material, such as documents, emails and websites.

Verbal Communication Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Verbal Communication' unit stream, please refer to the interpretation guidance provided on pages 65 - 75. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBCMM211 Apply communication skills

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Seek advice from supervisor on <i>communication methods</i>	<p>Communication methods may include:</p> <ul style="list-style-type: none"> non-verbal communication (e.g. digital technologies and cloud-based communication, emails) verbal communication (e.g. face-to-face communication, meetings, telephone calls).
3.1 Identify <i>formats</i> for written information according to <i>organisational policies and procedures</i>	<p>Formats may include:</p> <ul style="list-style-type: none"> organisation templates. <p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> communication policies and procedures style guides.
Foundation Skills	Notes
Reading: Reviews <i>textual information</i> to identify <i>communication requirements</i> and <i>organisational procedures</i>	<p>Textual information may include:</p> <ul style="list-style-type: none"> styles guides manuals. <p>Communication requirements may include:</p> <ul style="list-style-type: none"> background knowledge of topics identifying audience (e.g. potential language barriers). <p>Organisational procedures may include:</p> <ul style="list-style-type: none"> communication procedures.
Writing: Drafts <i>simple texts</i> using appropriate grammar, spelling and punctuation in accordance with <i>organisational standards</i>	<p>Simple texts may include:</p> <ul style="list-style-type: none"> digital communication forums (e.g. chat platforms) emails letters text messages. <p>Organisational standards may include:</p> <ul style="list-style-type: none"> style guides templates.
Technology: Uses <i>digital tools</i> to complete tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> chatpods cloud-based applications and tools email services text messages virtual meeting technology word processing tools.



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BSBCMM211 Apply communication skills**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Use <i>verbal and non-verbal skills</i> to seek and convey information in face-to-face situations on at least three occasions	<p>Verbal skills may include:</p> <ul style="list-style-type: none"> • active listening • paraphrasing • positive and professional presentation • questioning • seeking clarification • using formal and informal language (e.g. appropriate emoji use, slang terminology, jargon). <p>Non-verbal skills may include:</p> <ul style="list-style-type: none"> • body language • eye contact.
Knowledge Evidence	Notes
<i>Organisational policies and procedures</i> related to workplace communication	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • communication policies and procedures • style guides.
<i>Standards</i> of written information applicable to own role	<p>Standards may include:</p> <ul style="list-style-type: none"> • style guides • templates.



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BSBCMM411 Make presentations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>target audience, location</i> and <i>resources</i> requirements	<p>Target audience may relate to:</p> <ul style="list-style-type: none"> • age • demographics • existing knowledge • numbers. <p>Locations may include:</p> <ul style="list-style-type: none"> • in-person • virtual. <p>Resources may include:</p> <ul style="list-style-type: none"> • hand-outs • interactive and collaborative tools (e.g. quizzes, polls, forms) • post-it notes • slides • whiteboard.
1.3 Select <i>presentation strategies, format</i> and <i>delivery methods</i> according to presentation requirements	<p>Presentation strategies may include:</p> <ul style="list-style-type: none"> • audience engagement (e.g. open-ended questions, collaborative activity) • formal and informal approaches. <p>Formats and delivery methods may include:</p> <ul style="list-style-type: none"> • formal and informal approaches • in-person meetings • virtual meeting technology.
1.4 Select <i>techniques</i> to evaluate presentation effectiveness	<p>Techniques may include:</p> <ul style="list-style-type: none"> • feedback checklists • peer and supervisor reviews • observational checklists • self-reflecting • surveys • variational checklists • video recordings of presentation.



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BSBCMM411 Make presentations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: <i>Reviews and analyses documents</i> to identify information relevant to a specific presentation	Reviewing and analysing documents may include: <ul style="list-style-type: none"> confirming reliability of sources considering copyright and intellectual property (IP) rights.
Oral communication: Presents information using words and <i>non-verbal features</i> appropriate to the audience and context	Non-verbal features may include: <ul style="list-style-type: none"> appropriate dress code body language eye contact.
Planning and organising: Demonstrates sophisticated control over oral, visual and written formats, drawing on a range of <i>communication practices</i> to achieve goals	Communication practices may include: <ul style="list-style-type: none"> articulating and pace expanding on key points monitoring non-verbal body language of audience tone volume and projection of voice.
Initiative and enterprise: Selects and uses <i>appropriate conventions and protocols</i> to encourage interaction and to present information	Appropriate conventions and protocols may relate to: <ul style="list-style-type: none"> communication etiquette instructional design methods and modes of communication recording (e.g. confidentiality, privacy, access and storage considerations) transitions using links. <p>Appropriate conventions and protocols may depend on organisational and industry codes of conduct.</p>
Technology: Uses the <i>main features and functions of digital tools</i> to complete work tasks	Main features and functions may include: <ul style="list-style-type: none"> editing formatting grammar and spell checks referencing style guides. <p>Digital tools may include:</p> <ul style="list-style-type: none"> presentation tools (e.g. PowerPoint, Adobe Spark, Prezi) word processing tools.



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BSBCMM411 Make presentations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Information collection methods</i> that support review and feedback of presentations	Information collection methods may include: <ul style="list-style-type: none"> • primary and secondary research • qualitative and quantitative feedback • surveys.
<i>Organisational and legislative obligations and requirements</i> relevant to presentations	Organisational and legislative obligations and requirements may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Copyright Act 1968 • Intellectual Property Laws Amendment Act 2015 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988 • storage, security and access.
Assessment Conditions	Notes
<i>Equipment, materials and business software packages</i> for making a presentation	Equipment, materials and business software packages may include: <ul style="list-style-type: none"> • presentation tools (e.g. PowerPoint, Adobe Spark, Prezi) • word processing tools.



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BSBCMM412 Lead difficult conversations**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>conversational requirements</i>	Conversational requirements may include: <ul style="list-style-type: none"> personal presentation standards or practices understanding the purpose of the conversation.
1.2 Identify, gather and develop <i>materials</i> required for the conversation according to <i>organisational policies and procedures</i>	Materials may include: <ul style="list-style-type: none"> customer and client feedback evidence and supporting documents job descriptions performance planning documents performance reviews. Organisational policies and procedures may include: <ul style="list-style-type: none"> performance management framework.
1.3 Organise the <i>logistics</i> and stakeholders required for the conversation	Logistics may include: <ul style="list-style-type: none"> access and equity length of time required notice of conversation venue.
1.4 Seek feedback from <i>relevant personnel</i> on conversational content	Relevant personnel may include: <ul style="list-style-type: none"> customers employee assistance programs (EAP) human resources (HR) colleagues supervisors.
2.5 Refer stakeholders to relevant <i>support services</i> , as required	Support services may include: <ul style="list-style-type: none"> advocacy and individual representation (e.g. unions, support person) crisis call centers (e.g. Beyond Blue) EAP employee assistance schemes (EAS) mediation services.
3.3 Identify <i>areas of improvement</i> for undertaking difficult conversations according to feedback received	Areas of improvement may include: <ul style="list-style-type: none"> building communities of practice networking leadership skills performance management skills recording feedback requesting coaching self-reflecting.



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BSBCMM412 Lead difficult conversations**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: <i>Reviews and analyses documents</i> to identify information relevant to a specific conversation	Reviewing and analysing documents may include: <ul style="list-style-type: none"> confirming reliability of sources considering copyright and intellectual property (IP) rights.
Oral Communication: Presents information using words and <i>non-verbal features</i> appropriate to the audience and context	Non-verbal features may include: <ul style="list-style-type: none"> appropriate dress code body language eye contact.
Initiative and enterprise: Demonstrates sophisticated control over oral, visual and written formats, drawing on a range of <i>communication practices</i> to achieve goals	Communication practices may include: <ul style="list-style-type: none"> appropriate language use being objective rather than subjective empathetic listening engagement and ownership evidence-based genuine, authentic, courageous conversations questioning techniques reflective practice.
Technology: Uses the <i>main features and functions</i> of digital tools to complete work tasks	Main features and functions may include: <ul style="list-style-type: none"> editing formatting grammar and spell checks recording referencing style guides. Digital tools may include: <ul style="list-style-type: none"> email services word processing tools.
Knowledge Evidence	Notes
<i>Legislation, standards and codes of practice</i> relating to workplace communication	Legislation, standards and codes of practice may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 (Schedule 2: Australian Consumer Law) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation misconduct and mediation procedures Privacy Act 1988 (Part III, Division 2: Australian Privacy Principles).



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BSBCMM412 Lead difficult conversations**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Workplace policies and procedures</i> relevant to communication	Workplace policies and procedures may include: <ul style="list-style-type: none"> • communication protocols • grievance processes • organisational and industry codes of conduct • performance management • psychological safety • WHS and wellness procedures.
<i>Communication styles</i>	Communication styles may include: <ul style="list-style-type: none"> • assertive • empathetic.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> • checklists • quick reference guides • templates.



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BSBCMM511 Communicate with influence**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50320 Diploma of Human Resource Management BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Confirm authority to present material on behalf of an organisation or work area, according to <i>organisational policies and procedures</i>	Organisational policies and procedures may include: <ul style="list-style-type: none"> communications policies style guides.
2.2 Identify and document potential <i>issues and problems</i>	Issues and problems may include: <ul style="list-style-type: none"> access cultural diversity handling interruptions hierarchy and lines of authority keeping to conversation purpose managing audience attitudes and knowledge organisational culture time.
3.2 Prepare <i>meeting materials</i> and distribute to stakeholders	Meeting materials may include: <ul style="list-style-type: none"> agenda meeting requests organisational templates for meeting protocols (e.g. minute-taking templates) reports stakeholder invitations.
4.1 Identify <i>forums</i> to present according to organisational objectives	Forums may include: <ul style="list-style-type: none"> conferences customer and client meetings industry networks and meetings stakeholder consultations team meetings.
4.2 Determine tone, <i>structure, style</i> of communication and presentation according to target audience	Structure may include: <ul style="list-style-type: none"> client meetings team meetings. Style may include: <ul style="list-style-type: none"> discussion informational influential negotiation. <p>Structure and style of communication and presentation may depend on the purpose and identified audience.</p>



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BSBCMM511 Communicate with influence**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50320 Diploma of Human Resource Management BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.6 Evaluate presentation and identify <i>areas for improvement</i>	Areas for improvement may include: <ul style="list-style-type: none"> • building communities of practice • networking • leadership skills • performance management skills • recording feedback • requesting coaching • self-reflecting.
Foundation Skills	Notes
Writing: Prepares <i>documentation</i> that summarises key findings and outcomes	Documentation may include: <ul style="list-style-type: none"> • meeting minutes • presentations • reports.
Teamwork: Selects and uses relevant <i>conventions and protocols</i> when communicating with team members	Conventions and protocols may relate to: <ul style="list-style-type: none"> • communications policies • organisational style guides.
Self-management: Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of <i>communication practices</i> to achieve goals	Communication practices may include: <ul style="list-style-type: none"> • being proactive, not reactive • empathetic listening.
Initiative and enterprise: Understands the implications of <i>legal and ethical responsibilities</i> to maintain confidentiality	Legal and ethical responsibilities may relate to: <ul style="list-style-type: none"> • anti-discrimination • appropriate communication on social media • commercial confidence • confidentiality • defamation • organisational and industry codes of conduct • privacy.
Performance Evidence	Notes
Identifying <i>suitable platform</i> for presentations	Suitable platforms may include: <ul style="list-style-type: none"> • conferences • customer and client meetings • industry networks and meetings • social media (e.g. blogs, Twitter) • stakeholder consultations • team meetings.



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BSBCMM511 Communicate with influence**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50320 Diploma of Human Resource Management BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Techniques</i> for negotiation, mediation, conflict resolution and incident de-escalation	Techniques may include: <ul style="list-style-type: none"> advanced and respectful communication assertiveness emotional intelligence (EI) maintaining control and structure questioning reflecting setting ground rules.
Structured and inclusive <i>meeting procedures</i>	Meeting procedures may include: <ul style="list-style-type: none"> appropriate representation formal acknowledgement of country inclusive language inclusive practice procedures (e.g. respect for diversity, anti-discrimination) organisational communication protocols.
Relevant <i>organisational policies and procedures</i> on confidentiality of information	Organisational policies and procedures may include: <ul style="list-style-type: none"> codes of conduct communications policies privacy policies.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> checklists quick reference guides templates.



Conveyancing

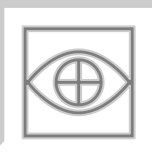
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Conveyancing Unit Sector Overview

The Conveyancing (CNV) unit sector incorporates specialist units of competency aimed at supporting individuals who are responsible for conveyancing work, team leadership and the management of a conveyancing practice.

Relevant job roles may include licensed conveyancer or settlement agent.



Glossary of common terminology

Legislative requirements

Legislative requirements for conveyancing may refer to specific state or territory Acts or Regulations, these may include:

- [Electronic Conveyancing \(Adoption of National Law\) Act 2012 \(NSW\)](#)
- [NSW Conveyancers Licensing Act 2003](#)
- [Electronic Conveyancing \(Adoption of National Law\) Act 2013 \(VIC\)](#)
- [Conveyancers Act 2006 \(VIC\)](#)
- [Electronic Conveyancing National Law \(Queensland\) Act 2013 \(QLD\)](#)
- [Property Law Act 1974 \(QLD\)](#)
- [Electronic Conveyancing Act 2014 \(WA\)](#)
- [Electronic Conveyancing National Law \(South Australia\) Act 2013 \(SA\)](#)
- [Conveyancers Act 1994 \(SA\)](#)
- [Electronic Conveyancing \(Adoption of National Law\) Act 2013 \(TAS\)](#)
- [Conveyancing Act 2004 \(TAS\)](#)
- [Electronic Conveyancing \(National Uniform Legislation\) Act 2013 \(NT\)](#)
- [Electronic Conveyancing National Law \(ACT\) Act 2020.](#)

Word processing

Word processing refers to the creation and manipulation of text on a computer or word processor. Software and tools used for this may be a part of an organisation's internal system, as well as online collaborative word processing tools.

Conveyancing Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Conveyancing' unit stream, please refer to the interpretation guidance provided on pages 78 - 86. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBCNV511 Take instructions in relation to a conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and <i>verify the client identity</i> according to practice policies and procedures	<p>Verifying the client identity may relate to:</p> <ul style="list-style-type: none"> state-based legislation state land registry services Verification of Identity (VOI).
3.1 Identify the roles of <i>various parties</i> involved in the conveyancing transaction	<p>Various parties may include:</p> <ul style="list-style-type: none"> conveyancer acting for purchaser or for vendor incoming or outgoing mortgagee.
4.1 Document terms of engagement which comply with <i>legislative, regulatory and practice requirements</i> and articulate to client clearly and promptly	<p>Legislative, regulatory and practice requirements may include:</p> <ul style="list-style-type: none"> Australian Registrars' National Electronic Conveyancing Council (ARNECC) client authorisation for e-transactions state and territory legislation.
6.4 Make referrals to other professionals or third parties, <i>where required</i>	<p>Examples where referrals may be required include:</p> <ul style="list-style-type: none"> geotechnical reports identification surveys pest and building reports strata inspection reports.
Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and to access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> commercial software (e.g. Smokeball, Simpli) email services internet land registry Property Exchange Australia (PEXA) subscribing to precedent firms word processing tools.
Knowledge Evidence	Notes
<i>Relevant types of contract titles</i> for the sale of land, Certificates of Title, interests in land and other required documentation	Relevant types of contract titles may be determined by state or territory contract requirements.



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BSBCNV512 Finalise the conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify all parties to the transaction and take all <i>relevant actions</i> to ensure they are ready to complete the transaction	<p>Relevant actions may include:</p> <ul style="list-style-type: none"> • exchanging contracts • following checklists • settlements • post-settlement registrations.
1.6 Arrange settlement with all relevant parties and invite participants to an Electronic Network Operator's settlement space, <i>where required</i>	<p>Where required may relate to specific state and territory Electronic Network Operator's settlement space requirements.</p>
1.7 <i>Attend the settlement</i> , where required	<p>Attending the settlement may be achieved through electronic attendance (e.g. some practitioners may seek services of agents to attend for them).</p>
4.9 Close and archive file according to <i>legislative, regulatory, contractual and practice requirements</i>	<p>Legislative, regulatory, contractual and practice requirements may include:</p> <ul style="list-style-type: none"> • Australian Registrars' National Electronic Conveyancing Council (ARNECC) client authorisation for e-transactions • state and territory legislation.
Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and to access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • commercial software (e.g. Smokeball, Simpli) • email services • internet • land registry • Property Exchange Australia (PEXA) • subscribing to precedent firms • word processing tools.
Performance Evidence	Notes
Implement <i>post-transaction procedures</i> , where required.	<p>Post-transaction procedures may include:</p> <ul style="list-style-type: none"> • outstanding land taxes • paying various parties (e.g. agents commission, water and rates, order on the agent) • registering transfer and other dealings (e.g. discharge of mortgage) • sending notice of attornment • withholding Goods and Services Tax (GST).



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BSBCNV512 Finalise the conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<p><i>Formal and informal industry codes of practice governing settlement procedures</i></p>	<p>Formal industry codes of practice may include:</p> <ul style="list-style-type: none"> conveyancing licensing registration code of conduct settlement procedure codes of practice. <p>Informal industry codes of practice may include:</p> <ul style="list-style-type: none"> Australian Institute of Conveyancers rules of conduct culture of profession state or territory based law societies or councils (e.g. Law Society of New South Wales, Law Society of Western Australia) settlement procedure codes of practice.



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BSBCNV611 Interpret a legal document and provide advice in a conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and document <i>statutory</i> and <i>common law principles</i> governing legal document and its function in conveyancing transaction	<p>Statutory principles may include:</p> <ul style="list-style-type: none"> • Acts Interpretation Act 1901 (and state equivalents) • state or territory based conveyancing legislation (e.g. section 54A of NSW Conveyancing Act 1919 requiring contract evidenced in writing for enforceability). <p>Common law principles may include:</p> <ul style="list-style-type: none"> • case law as to how to read a contract.
2.3 Identify <i>non-legal interests</i> and other needs of the client in relation to the subject matter of the document	<p>Non-legal interests may include:</p> <ul style="list-style-type: none"> • clients comfortability • confidence that transactions will continue.
5.1 Assess <i>legal</i> and <i>non-legal issues</i> and <i>risks</i> to the client arising from legal document	<p>Legal issues may include:</p> <ul style="list-style-type: none"> • consequences of default under a contract. <p>Non-legal risks may include:</p> <ul style="list-style-type: none"> • bushfires • flood development control plans.
Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and to access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • commercial software (e.g. Smokeball, Simpli) • email services • internet • land registry • Property Exchange Australia (PEXA) • subscribing to precedent firms • word processing tools.
Knowledge Evidence	Notes
<i>Insurance requirements</i> relevant to a conveyancing transaction, including title insurance	<p>Insurance requirements may include:</p> <ul style="list-style-type: none"> • insuring the premises (e.g. for fire damages) • mortgage insurance • strata insurance • contents insurance • landlords insurance.



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BSBCNV612 Identify and apply legal requirements for a conveyancing transaction**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Interpret <i>relevant legislation</i> and its application to conveyancing practice	Relevant legislation may include: <ul style="list-style-type: none"> state and territory legislation.
2.2 Analyse <i>common interpretation problems</i>	Common interpretation problems may include: <ul style="list-style-type: none"> Acts Interpretation Act 1901 state or territory interpretation Acts statutory and common law principles.

Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> commercial software (e.g. Smokeball, Simpli) email services internet land registry Property Exchange Australia (PEXA) subscribing to precedent firms word processing tools.



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BSBCNV613 Prepare legal documents for a conveyancing transaction**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Evaluate legal nature of document	<p>Evaluating the legal nature of a document may include consideration of:</p> <ul style="list-style-type: none"> document and prescribed form document objectives enforceability witness requirements.
1.3 Interpret and apply <i>statutory and general law principles</i> governing document and its function in conveyancing transaction	<p>Statutory and general law principles may include:</p> <ul style="list-style-type: none"> state and territory legislation.
Foundation Skills	Notes
Reading: Analyses and evaluates <i>complex documentation</i> from a variety of sources checking for accuracy, completeness and relevance	<p>Complex documentation may include:</p> <ul style="list-style-type: none"> case law contracts for sale leases legislation mortgages.
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and to access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> commercial software (e.g. Smokeball, Simpli) email services internet land registry Property Exchange Australia (PEXA) subscribing to precedent firms word processing tools.
Knowledge Evidence	Notes
Definitions of <i>conflict of interest</i> within legislation and the industry	<p>Conflicts of interest may relate to:</p> <ul style="list-style-type: none"> state and territory conveyancing licencing Acts and Regulations professional rules of conduct (e.g. Australian Institute of Conveyancers).
Common professional and <i>conveyancing industry terminology</i>	<p>Conveyancing industry terminology may include:</p> <ul style="list-style-type: none"> mortgagee mortgagor PEXA vendor.



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BSBCNV614 Apply principles of trust accounting

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop <i>policies and procedures</i> for trust account-keeping according to trust account requirements, key principles of accounting and financial management, and legislative requirements	<p>Policies and procedures may include embedding requirements of:</p> <ul style="list-style-type: none"> state and territory conveyancing Acts and Regulations professional rules of conduct (e.g. Australian Institute of Conveyancers).
2.3 Confirm transactions are supported by required authorisation and documentation and according to <i>legislative requirements</i> and practice policies and procedures	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> state and territory legislation.
3.4 Facilitate continuous training for <i>relevant practice staff</i> according to legislative requirements and practice policies and procedures	<p>Relevant practice staff may include:</p> <ul style="list-style-type: none"> accountants bookkeepers licensee responsible for trust accounts.
Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and to access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> commercial software (e.g. Smokeball, Simpli) email services internet land registry Property Exchange Australia (PEXA) subscribing to precedent firms word processing tools.
Performance Evidence	Notes
Use <i>standard accounting principles</i> and <i>financial management practices</i>	<p>Standard accounting principles may include:</p> <ul style="list-style-type: none"> controlled money in an interest-bearing account ledgers for each client. <p>Financial management practices may include:</p> <ul style="list-style-type: none"> specific software for conveyancers and solicitors.
Knowledge Evidence	Notes
<i>Professional and ethical behaviour</i> relevant to managing trust accounts	<p>Professional and ethical behaviour may relate to:</p> <ul style="list-style-type: none"> general law principles (e.g. conveyancer is a fiduciary) licensing requirements organisational and industry codes of practice state and territory legislative requirements.



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BSBCNV615 Interpret search results for a conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>sources of information</i> relevant to the transaction	Sources of information may include: <ul style="list-style-type: none"> government departments information brokers (e.g. InfoTrack or SAI Global) land registries (e.g. Land Registries Services) local councils statutory authorities utilities suppliers.
4.1 Identify relevant third parties and <i>other relevant stakeholders</i>	Other relevant stakeholders may include: <ul style="list-style-type: none"> finance providers mortgagees.
5.1 Present documentation according to relevant <i>legislation and regulations</i> and practice policies and procedures	Legislation and regulations may include: <ul style="list-style-type: none"> state and territory legislation.
Foundation Skills	Notes
Technology: Uses <i>digital technologies</i> to access, extract and share relevant information to achieve required outcomes	Digital technologies may include: <ul style="list-style-type: none"> commercial software (e.g. Smokeball, Simpli) email services internet land registry Property Exchange Australia (PEXA) subscribing to precedent firms word processing tools.
Performance Evidence	Notes
Assess <i>transaction risk</i>	Assessment of transaction risks may relate to: <ul style="list-style-type: none"> age of documents covenants easements risk acceptance risk transfers.
Knowledge Evidence	Notes
Professional and industry <i>terminology</i>	Terminology may include: <ul style="list-style-type: none"> mortgagee mortgagor PEXA vendor.



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BSBCNV616 Comply with tax obligations in a conveyancing transaction

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>reliable sources for research information</i> relevant to practice policies and procedures	<p>Reliable sources for research information may include:</p> <ul style="list-style-type: none"> • Australian Institute of Conveyancers • Australian Registrars' National Electronic Conveyancing Council (ARNECC) • Australian Tax Office (ATO) • Office of Fair Trading • State Revenue Offices.
2.7 Consult relevant <i>legal or accounting specialists</i> and confirm own assessment, where required	<p>Legal or accounting specialists may include:</p> <ul style="list-style-type: none"> • accountants • solicitors.
4.4 Lodge forms with <i>relevant authorities</i>	<p>Relevant authorities may include:</p> <ul style="list-style-type: none"> • ATO • State Revenue Offices.
Foundation Skills	Notes
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • commercial software (e.g. Smokeball, Simpli) • email services • internet • land registry • Property Exchange Australia (PEXA) • subscribing to precedent firms • word processing tools.
Knowledge Evidence	Notes
Common professional and <i>industry terminology</i>	<p>Industry terminology may include:</p> <ul style="list-style-type: none"> • mortgagee • mortgagor • PEXA • vendor.



Critical Thinking

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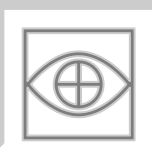
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Critical Thinking Unit Sector Overview

The Critical Thinking (CRT) unit sector incorporates units of competency aimed at supporting individuals in various industries and job roles to develop and apply critical thinking and problem solving skills and techniques.

Critical thinking skills enable an individual to gather, analyse, and apply information to develop effective solutions. These skills support intellectual rigour and objectivity. The ability to apply a critical thinking approach is highly sought by employers, as the skill is increasingly important for solving organisational challenges.



Glossary of common terminology

Legislative frameworks

Legislative frameworks may relate to:

- anti-discrimination (e.g. [Age Discrimination Act 2004](#), [Disability Discrimination Act 1992](#), [Racial Discrimination Act 1975](#), [Sex Discrimination Act 1984](#))
- codes of conduct and compliance codes
- [Fair Work Act 2009](#)
- local, state and territory work health and safety (WHS) legislation
- [Privacy Act 1988](#).

PESTEL

PESTEL stands for political, economic, social, technological, legal and environmental.

SWOT

SWOT stands for strengths, weaknesses, opportunities and threats.

Critical Thinking Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Critical Thinking' unit stream, please refer to the interpretation guidance provided on pages 89 - 101. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBCRT201 Develop and apply thinking and problem solving skills

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>key features</i> and role of problem solving in the workplace	Key features may relate to: <ul style="list-style-type: none"> • implementation. • problem and opportunity identification • solution development.
1.2 Identify different types of questions and styles of questioning	Types of questions may include: <ul style="list-style-type: none"> • leading and follow up questions • open and closed questions • rhetorical questions.
1.3 Identify <i>basic problem solving techniques</i>	Basic problem solving techniques may include: <ul style="list-style-type: none"> • brainstorming • mind-mapping • lateral thinking (e.g. six thinking hats, 5 whys, fishbone diagrams) • observation • outcome evaluation and review • trial and error.
1.4 Collaborate with <i>relevant stakeholders</i> and share ideas on different types of questions, styles of questioning and applicable problem solving techniques	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • line managers or supervisors • team leaders • work health and safety (WHS) officers.
4.1 Consult with relevant stakeholders and identify improvements for problem solving process	Identify improvements for problem solving process may relate to: <ul style="list-style-type: none"> • reviewing • reflecting • refining • revising.



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BSBCRT201 Develop and apply thinking and problem solving skills**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key features and processes of critical thinking and problem solving</i>	<p>Key features of critical thinking and problem solving may include:</p> <ul style="list-style-type: none"> • ability to identify pros and cons • curiosity • exercising logic • identifying issues • low-level problem solving • questioning. <p>Processes of critical thinking and problem solving may include:</p> <ul style="list-style-type: none"> • active listening • clarifying • exercising logic • questioning techniques (e.g. open and closed questions) • stepping through process sequentially.
<i>Typical blockers to problem solving processes</i>	<p>Typical blockers may include:</p> <ul style="list-style-type: none"> • assumptions • bias • cultural considerations • different beliefs or ideas • lack of accessible information, expertise, research or support from management • procrastination.



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BSBCRT311 Apply critical thinking skills in a team environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>organisational</i> and <i>legislative frameworks</i> applicable to selected problem	<p>Organisational frameworks may relate to:</p> <ul style="list-style-type: none"> change management and reporting equal employment opportunity (EEO) industry standards and codes of practice. <p>Legislative frameworks may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
1.4 Consult <i>key stakeholders</i> using questions to gather information on selected problem	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> customers colleagues line managers or supervisors other business units (e.g. human resources [HR]) team members.
2.1 Identify a range of <i>critical thinking techniques</i> to generate solutions to selected problem	<p>Critical and creative thinking techniques to generate ideas</p> <ul style="list-style-type: none"> brainstorming lateral Thinking mind mapping problem visualisation six thinking Hats.
2.4 Apply agreed <i>criteria</i> for selecting most suitable option in consultation with team members	<p>Criteria may include:</p> <ul style="list-style-type: none"> cost benefit analysis implementation viability innovative appeal popularity simplicity 'v' complexity solving the stated problem – fit for purpose time and resource requirements and access value adding.
3.1 Present solution to <i>relevant stakeholders</i> with explanation of critical thinking processes involved	<p>Relevant stakeholders may include those listed under 'key stakeholders' above.</p>



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BSBCRT311 Apply critical thinking skills in a team environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Comprehends <i>textual information</i> and integrates ideas and concepts from various sources	Textual information may include: <ul style="list-style-type: none"> complaints and feedback Fair Work Act 2009 organisational policies and procedures (e.g. WHS) Privacy Act 1988 statistical analysis and data (e.g. sales data).
Knowledge Evidence	Notes
<i>Methods to develop individual critical and creative thinking skills</i>	Methods to develop individual critical and creative may include: <ul style="list-style-type: none"> hackathons project work puzzles reflection sprints workshops/short courses world Cafes.
<i>Boundaries to be considered when generating ideas and responses</i>	Boundaries to be considered may include: <ul style="list-style-type: none"> Ethics or Code of Conduct Legality Organisational Policy and Procedure Probability Risks.



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BSBCRT411 Apply critical thinking to work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business	BSB30220 Certificate III in Entrepreneurship and New Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40720 Certificate IV in Library and Information Services BSB40820 Certificate IV in Marketing and Communication BSB40920 Certificate IV in Project Management Practice
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>key characteristics</i> of critical thinking processes	<p>Key characteristics may include:</p> <ul style="list-style-type: none"> • absence of bias • collaborative research (e.g. with peers or experts) • consultation • curiosity • evidence based analysis • evidence-based (e.g. quality research, valid sources) • inquiry • research.
2.5 Present ideas for solutions and justify decision making process to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • customers • heads of department • leadership team • suppliers • team members.
Foundation Skills	Notes
Numeracy: Interprets and critically analyses <i>numerical data</i> to determine work process requirements	<p>Numerical data may relate to:</p> <ul style="list-style-type: none"> • complaints • customer satisfaction • defects • incident or injury • outputs • quality control • revenue • sales • social media traffic and engagement.
Uses features and functions of <i>digital tools and technologies</i> to store and present information	<p>Digital tools and technologies may include:</p> <ul style="list-style-type: none"> • cloud-based project management and research tools • presentation tools (e.g. PowerPoint, Prezi, Google Slides) • spreadsheets • vidcasts • virtual meeting technology (e.g. Trello, Slack, Stormz, Miro, Zoom).



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BSBCRT411 Apply critical thinking to work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business	BSB30220 Certificate III in Entrepreneurship and New Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40720 Certificate IV in Library and Information Services BSB40820 Certificate IV in Marketing and Communication BSB40920 Certificate IV in Project Management Practice
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key characteristics</i> of critical thinking processes	Key characteristics may include: <ul style="list-style-type: none"> • collaborative research (e.g. with peers or experts) • consultation • curiosity • evidence-based (e.g. quality research, valid sources) • research • statistics and data.
<i>Legislative requirements</i> relating to workplace practices	Legislative frameworks may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
Assessment Conditions	Notes
<i>Corporate governance documentation</i> required for role	Corporate governance documentation may include: <ul style="list-style-type: none"> • contracts • cyber security policies and procedures • bullying, harassment, diversity and inclusion policies • job descriptions • operational plans • organisational and industry codes of conduct • organisational procedures and policies • quality procedures • strategic plans • value and vision statements.



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BSBCRT412 Articulate, present and debate ideas**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB50120 Diploma of Business
Skill sets	BSBSS00098 Marketing Foundations Skill Set BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Research organisational or <i>legislative frameworks</i> applicable to communication	<p>Legislative frameworks may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
2.3 Consider potential <i>communication challenges</i> and strategies for mitigation	<p>Communication challenges may include:</p> <ul style="list-style-type: none"> • Cultural factors • Imagination • Language • Perceptions and bias • Previous experience/knowledge
2.4 <i>Research</i> and document selected key ideas for presentation according to objectives of communication	<p>Research may be sourced from:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) • consumer research • customer service surveys • environmental scans • equipment and machinery requirements • organisational frameworks • work health and safety (WHS) data. <p>Research may be industry dependent.</p>
3.1 Present <i>substantiated communication</i> to audience	<p>Substantiated communication may include:</p> <ul style="list-style-type: none"> • evidence-based research • links to data • objective facts.
Foundation Skills	Notes
Technology: Uses features and functions of <i>digital tools and technologies</i> to store and present information	<p>Digital tools and technologies may include:</p> <ul style="list-style-type: none"> • cloud project management and research tools • presentation tools (e.g. PowerPoint, Prezi, Google Slides) • spreadsheets • vidcasts • virtual meeting technology.



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BSBCRT412 Articulate, present and debate ideas**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB50120 Diploma of Business
Skill sets	BSBSS00098 Marketing Foundations Skill Set BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<p><i>Methods of researching ideas</i> including:</p> <ul style="list-style-type: none"> desktop research consultation with relevant experts 	<p>Methods of researching ideas may include:</p> <ul style="list-style-type: none"> data analysis literature review qualitative and quantitative research stakeholder interviews.
<p>Key features of <i>persuasive communication techniques</i>, including storytelling</p>	<p>Persuasive communication techniques may include:</p> <ul style="list-style-type: none"> energising evidence – data, research, artefacts language logic pitch provocation storytelling visual engagement.



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BSBCRT413 Collaborate in creative processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>legislative and organisational frameworks</i> applicable to task	<p>Legislative and organisational frameworks may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
1.4 Confirm <i>channels to communicate with team</i>	<p>Channels to communicate with team may include:</p> <ul style="list-style-type: none"> • emails • bulletins and newsletters • intranet • online forums • presentations • team meetings • virtual meeting technology.
3.3 Identify <i>methods and opportunities to improve collaborative skills</i>	<p>Methods and opportunities to improve collaborative skills may include:</p> <ul style="list-style-type: none"> • mentoring, coaching and training • networking • project and group work • shadowing.
Knowledge Evidence	Notes
<i>Methodologies</i> for creative idea generation and refinement	<p>Methodologies for creative idea generation may include:</p> <ul style="list-style-type: none"> • blue sky thinking • collaborative and creative brainstorming • connections • double diamond • excursions • fishbone diagrams • journey mapping • mindmapping • process flows and mapping • scamper • six thinking hats.



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BSBCRT511 Develop critical thinking in others**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management	BSB50320 Diploma of Human Resource Management BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Research <i>models</i> of critical and creative thinking	<p>Models may relate to:</p> <ul style="list-style-type: none"> • agile thinking • blue sky thinking • creative problem solving • design thinking • lateral thinking • systems thinking.
1.3 Facilitate <i>formal and informal learning opportunities</i> for addressing identified gaps	<p>Formal learning opportunities may include:</p> <ul style="list-style-type: none"> • certificates of achievement • internal training and coaching sessions. <p>Informal learning opportunities may include:</p> <ul style="list-style-type: none"> • desktop research • feedback • job rotations • mentoring • professional development conferences • shadowing • sprint or project participation..
3.3 Develop recommendations for improvements in future learning arrangements according to relevant <i>legislation</i> and organisation policies	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation.
Foundation Skills	Notes
Initiative and enterprise: Identifies implications of <i>legal and regulatory</i> responsibilities on own work	<p>Legal and regulatory responsibilities may relate to:</p> <ul style="list-style-type: none"> • change management and reporting • industry standards • organisational and industry codes of conduct.



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BSBCRT511 Develop critical thinking in others**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management	BSB50320 Diploma of Human Resource Management BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Models of critical and <i>creative thinking</i>	Creative thinking models may include: <ul style="list-style-type: none"> • agile thinking • blue sky thinking • creative problem solving • design thinking • lateral thinking • systems thinking.
Sources of reliable information relevant to workplace procedures	Sources of reliable information may include: <ul style="list-style-type: none"> • consumer research • customer service surveys • environmental scans • organisational frameworks • sales data • WHS data.



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BSBCRT512 Originate and develop concepts**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Select issue to be explored in consultation with <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external consultants government agencies industry peak bodies related internal agencies (e.g. marketing, creative) senior management team members.
1.3 <i>Research information</i> on possible solutions to identified <i>issue</i>	<p>Researching information may include:</p> <ul style="list-style-type: none"> competitor analysis complaints data customer satisfaction defects incident or injury data outputs production records quality control data revenue sales social media data. <p>Issues may include opportunities.</p>
2.2 Evaluate ideas against identified factors affecting viability	<p>Factors affecting viability may include:</p> <ul style="list-style-type: none"> competitive advantage cost benefit analysis fit for purpose innovative value market/user readiness or resistance.
Foundation Skills	Notes
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> cloud-based project management and research tools presentation tools (e.g. PowerPoint, Prezi, Google Slides) spreadsheets vidcasts virtual meeting technology.



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BSBCRT512 Originate and develop concepts**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Evaluate <i>viability of ideas</i>	<p>Viability of ideas may depend on:</p> <ul style="list-style-type: none"> • adequate resources • appropriate timeframes • cost effectiveness • ease of implementation • sustainability.
Knowledge Evidence	Notes
<i>Techniques for generating creative ideas and solutions, and for translating them into workable concepts.</i>	<p>Techniques for generating creative ideas and solutions may include:</p> <ul style="list-style-type: none"> • blue sky thinking • collaborative and creative brainstorming • fishbone diagrams • process flows and mapping • six thinking hats. <p>Translating them into workable concepts may relate to:</p> <ul style="list-style-type: none"> • market research activity • prototyping and testing • reflection, revision and re-development • user feedback.
Assessment Conditions	Notes
<i>Background information</i> required to evaluate the operational factors that will affect the implementation of concepts	<p>Background information may include:</p> <ul style="list-style-type: none"> • baseline information • business analyses • contextual analyses • global and socio-economic influences • PESTEL and SWOT analyses • related issues/



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BSBCRT611 Apply critical thinking for complex problem solving

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60520 Advanced Diploma of Marketing and Communication BSB60720 Advanced Diploma of Program Management BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>complex issue</i> for resolution within scope of job role and in consultation with relevant stakeholders	<p>Complex issues may include issues that involve:</p> <ul style="list-style-type: none"> entrenched behaviour or situation high levels of ambiguity large scale of outputs more than one element multiple stakeholders policy of legislative impact.
1.3 Research <i>legislative frameworks</i> and organisational policy or procedures applicable to identified issue	<p>Legislative frameworks may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation.
1.4 Calculate <i>required resources</i> and present to <i>relevant stakeholders</i>	<p>Required resources may include:</p> <ul style="list-style-type: none"> contractual agreements decision making frameworks equipment or tools funding. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> government agencies suppliers team members.
Foundation Skills	Notes
Learning: Makes a range of <i>critical</i> and <i>non-critical decision</i> in relatively complex situations, taking a range of constraints into account	<p>Critical decisions may relate to:</p> <ul style="list-style-type: none"> factors that enhance or detract from processes and may have a major impact on end result factors that create significant disruption or variation to existing or planned processes. <p>Non-critical decisions may include:</p> <ul style="list-style-type: none"> factors that enhance or detract from processes but have a minor impact on end result.
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> cloud-based project management and research tools presentation tools (e.g. PowerPoint, Prezi, Google Slides) spreadsheets vidcasts virtual meeting technology.



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BSBCRT611 Apply critical thinking for complex problem solving

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60520 Advanced Diploma of Marketing and Communication BSB60720 Advanced Diploma of Program Management BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Sources of relevant information</i> to identified issue, including desk research and stakeholder consultations	Sources of relevant information may include: <ul style="list-style-type: none"> • authentic and relevant evidence or data • industry relevant research or reports • legislation or organisational policy.
<i>Approval process</i> for workplace solution	Approval processes may include: <ul style="list-style-type: none"> • organisational sign-off procedures • referring to delegated authority.
Assessment Conditions	Notes
<i>Resources</i> required to undertake research, prepare a brief and develop a feedback register	Resources may include: <ul style="list-style-type: none"> • databases • observations • project management tools • reporting and presentation tools and software • specialist consultations.



Data Literacy

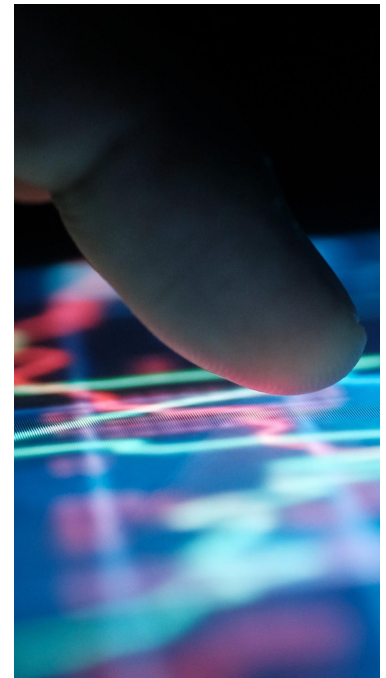
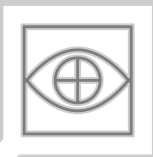
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Data Literacy Unit Sector Overview

The Data Literacy (DAT) unit sector incorporates units of competency aimed at supporting individuals in various industries and job roles to develop skills and knowledge to gather and analyse data.

Data literacy is the ability to derive meaningful insights from data. These skills enable a person to effectively identify, locate, interpret, and evaluate information to produce business insights.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Style guides	Style guides refer to standards to ensure consistency in style and format for the design of organisational material, such as documents, emails and websites.
Word processing	Word processing refers to the creation and manipulation of text on a computer or word processor. Software and tools used for this may be a part of an organisation's internal system, as well as online collaborative word processing tools.

Data Literacy Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Data Literacy' unit stream, please refer to the interpretation guidance provided on pages 103 - 106. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



BSBDAT201 Collect and record data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services
Skill sets	BSBSS00126 Contact Centre Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify <i>method</i> of data collection and recording procedures according to <i>organisational policies and procedures</i>	<p>Methods may include:</p> <ul style="list-style-type: none"> • feedback forms • phone interviews • questionnaires • surveys. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • confidentiality • privacy • storage, security and access.
2.3 Action <i>data source difficulties</i> within scope of own role, or escalate to <i>required personnel</i>	<p>Data source difficulties may include:</p> <ul style="list-style-type: none"> • ambiguous or missing data • bias • human error during input • misinterpretation. <p>Required personnel may include:</p> <ul style="list-style-type: none"> • finance personnel • human resources (HR) personnel • project managers • supervisors.
Foundation Skills	Notes
Technology: Uses specific functions and key features of common <i>digital systems and tools</i> and operates them effectively to complete data collection tasks	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • customer relationship management (CRM) databases • research and referencing tools • spreadsheets (e.g. Excel, Google Sheets) • word processing tools.



Overview

Level 2

Level 5

BSBDAT201 Collect and record data**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services
Skill sets	BSBSS00126 Contact Centre Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key data-collection methods</i>	Data-collection methods may include: <ul style="list-style-type: none"> • feedback forms • phone interviews • questionnaires • surveys.
<i>Work health and safety risks that apply to data-collection methods</i>	Work health and safety risks may relate to: <ul style="list-style-type: none"> • ergonomics • security.
<i>Organisational policies and procedures for collecting and recording data</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • confidentiality • copyright • intellectual property (IP) • privacy • reporting and communication • style guides.
<i>Key features and functions of technology used to collect data</i>	Key features and functions may include: <ul style="list-style-type: none"> • authentication • cloud or local connectivity • encryption • storage. Technology may include: <ul style="list-style-type: none"> • computers • internet • mobile devices • tablets.
<i>Code of conduct relevant to data-collection</i>	Codes of conduct may relate to: <ul style="list-style-type: none"> • confidentiality • copyright • data access • General Data Protection Regulation (GDPR) • IP policies • privacy • reporting and communication. <p>Codes of conduct may be organisational or industry-specific.</p>



BSBDAT501 Analyse data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50520 Diploma of Library and Information Services BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Access source of reliable data according to task requirements and <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> confidentiality copyright intellectual property (IP) privacy reporting and communication style guides.
1.3 Evaluate <i>reliability of data</i>	Reliability of data may depend on: <ul style="list-style-type: none"> appropriateness and relevance benchmarking for data completeness cross referencing reputable sources (e.g. peer reviewed).
1.4 <i>Store data</i> according to organisational policies and procedures	Storing data may depend on: <ul style="list-style-type: none"> confidentiality organisational data storage methods privacy system usage (e.g. customer relationship management [CRM] databases).
2.1 Select <i>methods</i> of data analysis according to task requirements and industry best practice	Methods may include: <ul style="list-style-type: none"> identifying trends and extrapolating insights prescriptive analytics qualitative and quantitative comparisons and testing statistical and diagnostic analytics.
Foundation Skills	Notes
Reading: Researches, analyses and evaluates <i>textual information</i> , from a wide range of sources, to identify information relevant to data analysis	Textual information may include: <ul style="list-style-type: none"> Australian Bureau of Statistics (ABS) indexes industry benchmarks public reports white papers.



BSBDAT501 Analyse data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50520 Diploma of Library and Information Services BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Oral communication: Uses a range of <i>techniques</i> to communicate complex concepts	Techniques may include: <ul style="list-style-type: none"> data visualisation (e.g. comparative graphs and tables) highlighting insights and trends reporting and presenting data.
Technology: Uses appropriate <i>technology platforms</i> and query languages and scripts to analyse data	Technology platforms may include: <ul style="list-style-type: none"> CRM databases research and referencing tools spreadsheets (e.g. Excel) word processing tools.
Knowledge Evidence	Notes
Key details of datasets and <i>techniques</i> for synthesising data	Techniques may include: <ul style="list-style-type: none"> extracting data from a database and manipulating accordingly filtering data in spreadsheets segmenting data (e.g. by demographics).
<i>Key legislative requirements</i> relating to data analysis	Key legislative requirements may relate to: <ul style="list-style-type: none"> collecting data local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
<i>Methods of reporting analysis</i>	Methods of reporting analysis may include: <ul style="list-style-type: none"> data visualisation (e.g. comparative graphs and tables) highlighting insights and trends project management reports reporting and presenting data.
Assessment Conditions	Notes
<i>Technology, software and consumables</i> required to analyse data	Technology, software and consumables may include: <ul style="list-style-type: none"> CRM databases research and referencing tools spreadsheets (e.g. Excel) word processing tools.
<i>Organisational operational policies and procedures</i> required for performance evidence	Organisational operational policies and procedures may relate to: <ul style="list-style-type: none"> reporting and communication.



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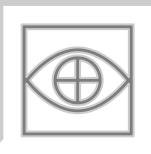
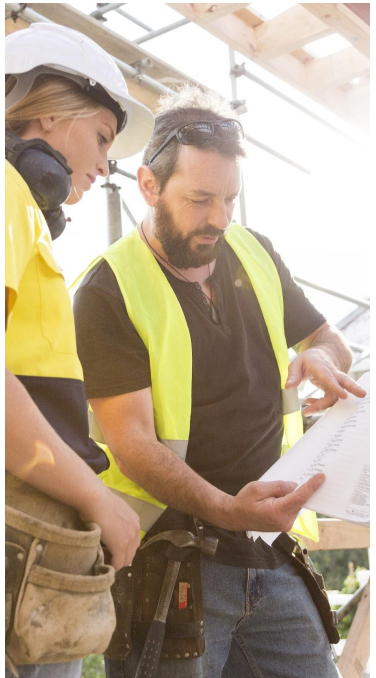




Entrepreneurship and Small Business Unit Sector Overview

The Entrepreneurship and Small Business (ESB) unit sector incorporates units of competency aimed at supporting individuals to establish a new venture or operate a business, either providing self-employment or as part of a larger organisation.

An individual that is competent in entrepreneurship demonstrates the skills and knowledge to plan, launch and maintain a new business venture. An individual that is entrepreneurial will also be able to identify business opportunities and develop strategies to gain advantage for an existing venture.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
PESTEL	PESTEL stands for political, economic, social, technological, legal and environmental.
Style guides	Style guides refer to standards to ensure consistency in style and format for the design of organisational material, such as documents, emails and websites.
SWOT	SWOT stands for strengths, weaknesses, opportunities and threats.
Word processing	Word processing refers to the creation and manipulation of text on a computer or word processor. Software and tools used for this may be a part of an organisation's internal system, as well as online collaborative word processing tools.

Entrepreneurship and Small Business Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Entrepreneurship and Small Business' unit stream, please refer to the interpretation guidance provided on pages 109 - 131. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



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Overview

Level 3

Level 4

BSBESB301 Investigate business opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00102 Micro Business Skill Set BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 <i>Source</i> and analyse market information for potential opportunities	<p>Sources may include:</p> <ul style="list-style-type: none"> • chambers of commerce • customers • federal government business information • internet research • local councils • peak bodies • public reports • user and employee experiences • white papers.
2.2 Identify <i>ethical and cultural requirements</i> of the market	<p>Ethical and cultural requirements may include:</p> <ul style="list-style-type: none"> • access and equity requirements • industry standards • organisational and industry codes of practice • religious and social requirements • specific market requirements.
Foundation Skills	Notes
Writing: Uses information and industry-related terminology to develop required <i>documentation</i>	<p>Documentation may relate to:</p> <ul style="list-style-type: none"> • competitor analysis • demographic information • identifying business opportunities • understanding market segments (e.g. market needs, behaviours, likes and dislikes, cultural and religious factors) • market gap analysis • white papers.
Technology: Uses a range of <i>digitally based technology</i> and applications to access and filter data, and then extract, organise and integrate relevant information	<p>Digitally based technology may include:</p> <ul style="list-style-type: none"> • cloud-based computing applications • customer relationship management (CRM) databases • Microsoft Power BI dashboards • social media • websites.



Overview

Level 3

Level 4

BSBESB301 Investigate business opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00102 Micro Business Skill Set BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Business research methods and data collection tools and software</i>	<p>Business research methods and data collection tools may include:</p> <ul style="list-style-type: none"> • analytics and predictive modelling • interviews • research (e.g. brand, experience or strategic research) • social listening • social media • surveys. <p>Software may include:</p> <ul style="list-style-type: none"> • chatbots • cloud-based computing applications • CRM databases • Microsoft Power BI dashboards. <p>Data may be qualitative or quantitative.</p>
Assessment Conditions	Notes
<i>Legislative and regulatory information relating to business opportunities</i>	<p>Legislative and regulatory information may include:</p> <ul style="list-style-type: none"> • Fairtrade • industry regulations • obligations and responsibilities relating to taxes, staff and creditor payments.



BSBESB302 Develop and present business proposals

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	BSB30120 Certificate III in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Communicate with <i>relevant stakeholders</i> the potential risks	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, creditors, debtors, government state bodies) internal stakeholders (e.g. business partners, employees).
2.3 Assist relevant stakeholders to develop <i>risk management systems</i>	<p>Risk management systems may include:</p> <ul style="list-style-type: none"> action plans developed from internal and external environmental analyses (e.g. SWOT and PESTEL) mitigations and controls risk ratings. <p>Risk management systems may depend on the organisation.</p>
Foundation Skills	Notes
Reading: Interprets information from a range of <i>sources</i>	<p>Sources may include:</p> <ul style="list-style-type: none"> legislation organisational policies and procedures.
Technology: Uses a range of <i>digital tools</i> to access, organise, integrate and present relevant information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> cloud-based computing applications customer relationship management (CRM) databases presentation tools (e.g. PowerPoint, Power BI dashboards) social media spreadsheets websites word processing tools.
Knowledge Evidence	Notes
<i>Factors</i> influencing financial viability of business ventures, including financial returns	<p>Factors may include:</p> <ul style="list-style-type: none"> customer behaviours economic and market trends global influences (e.g. pandemics, politics) legal and marketing viability operations.
<i>Principles of risk assessment</i> relevant to business opportunity described in performance evidence	<p>Principles of risk assessment may relate to:</p> <ul style="list-style-type: none"> compliance cultural risk external environmental risk financial risk level of competition. <p>Risk assessments may depend on the industry.</p>



Overview

Level 3

Level 4

BSBESB302 Develop and present business proposals

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	BSB30120 Certificate III in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Business technology</i> , including internet access and presentation software	<p>Business technology may include:</p> <ul style="list-style-type: none"> cloud-based computing applications CRM databases presentation tools (e.g. PowerPoint, Power BI dashboards) spreadsheets word processing tools.
<i>Legislation, regulations, standards and codes of practice</i> relating to business proposal described in performance evidence	<p>Legislation, regulations, standards and codes of practice may include:</p> <ul style="list-style-type: none"> Fairtrade Fair Work Act 2009 industry regulations organisational policies and procedures.
<i>Workplace documentation and resources</i> relevant to performance evidence	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> organisational policies and procedures organisational templates style guides.



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Level 4

BSBESB303 Organise finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	N/A
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.4 Seek <i>specialist financial advice</i> as required according to workplace procedures	<p>Specialist financial advice may be sourced from:</p> <ul style="list-style-type: none"> • Australian Tax Office (ATO) • banks • business financial advisors • government website platforms • investors • small business operators (e.g. accountants). <p>Specialist financial advice may depend on the size of the organisation.</p>
3.1 Investigate and <i>source</i> suitable types of finances	<p>Sources may include:</p> <ul style="list-style-type: none"> • angel investors • banks • crowdsourcing • family sources • government grants • insurance brokers • small business loans.
3.3 Complete required <i>documentation</i>	<p>Documentation may include:</p> <ul style="list-style-type: none"> • bank documentation • budgets • cash flows • contracts • forecasts • reports. <p>Documentation may be legally binding.</p>



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Level 4

BSBESB303 Organise finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	N/A
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Writing: Uses information and industry-related terminology to complete required workplace <i>documentation</i>	Documentation may include: <ul style="list-style-type: none"> • bank documentation (e.g. budgets, forecasting, cash flows) • contracts • reports.
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> • accounting software (e.g. MYOB, Xero) • customer relationship management (CRM) databases • presentation tools (e.g. PowerPoint, Power BI dashboards) • spreadsheets • word processing tools.
Knowledge Evidence	Notes
<i>Key financial terminology</i> relevant to new business ventures	Key financial terminology may include: <ul style="list-style-type: none"> • assets • cash flows • expenses • forecasting • liabilities • net profit • return on investment (ROI) • revenue.
Relationship between finances and sales and marketing <i>strategies</i>	Strategies may include: <ul style="list-style-type: none"> • market share analysis • sales forecasting.
Assessment Conditions	Notes
<i>Business technology</i> , including internet access	Business technology may include: <ul style="list-style-type: none"> • accounting software (e.g. MYOB, Xero) • cloud-based computing applications • CRM databases • presentation tools (e.g. PowerPoint, Power BI dashboards) • spreadsheets • word processing tools.



BSBESB304 Determine resource requirements for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Analyse business profile and consult with <i>required personnel</i> to determine business requirements for resources	<p>Required personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. industry associations, investors, suppliers) internal personnel (e.g. finance, information technology, human resources, procurement, marketing).
2.3 Engage with suppliers and <i>other key people</i> to negotiate supply of resources according to established workplace activities	<p>Other key people may include:</p> <ul style="list-style-type: none"> banks business negotiators recruitment agencies supply specialists unions.
3.1 Obtain or design <i>procedures and systems</i> for effective and efficient introduction and use of selected resources	<p>Procedures and systems may include following:</p> <ul style="list-style-type: none"> organisational and industry standards and codes of practice (e.g. plant usage within the workplace). work health and safety (WHS) legislation.
3.2 Ensure <i>procedures</i> are in place to monitor resource use and maintain, repair and replace resources	<p>Procedures may relate to:</p> <ul style="list-style-type: none"> monitoring authority network practices operating machinery standard operating procedures WHS legislation.

Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>textual and numerical information</i> from a range of sources and identifies key information	<p>Textual and numerical information may include:</p> <ul style="list-style-type: none"> inventory profit and loss quantitative measurements.
Technology: Uses a range of <i>digitally based technology</i> and applications to access and filter data, and then extract, organise, integrate and share information	<p>Digitally based technology may include:</p> <ul style="list-style-type: none"> cloud-based storage solutions customer relationship management (CRM) databases integrated inventory systems presentation tools (e.g. PowerPoint, Power BI dashboards) spreadsheets word processing tools.

Knowledge Evidence	Notes
<i>Business requirements</i> relating to required resources, including legislative and regulatory	<p>Business requirements may relate to:</p> <ul style="list-style-type: none"> Fairtrade industry regulations organisational and industry codes of conduct organisational policies and procedures.



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BSBESB304 Determine resource requirements for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	BSBSS00103 New Business Ventures Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Business equipment and resources</i> , including maintenance manuals	Business equipment and resources may include: <ul style="list-style-type: none"> organisational policies and procedures.
<i>Business technology</i> , including internet access	Business technology may include: <ul style="list-style-type: none"> cloud-based computing applications CRM databases presentation tools (e.g. PowerPoint, Power BI dashboards) spreadsheets word processing tools.



BSBESB305 Address compliance requirements for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>regulatory, taxation and insurance requirements</i> relevant to new business venture	<p>Regulatory, taxation and insurance requirements may relate to:</p> <ul style="list-style-type: none"> • federal laws • government and industry specific regulations • local government and council by-laws • personal liability • state laws • workcover.
1.2 Access <i>information</i> that assists in interpreting and explaining identified compliance requirements	<p>Information may be sourced from:</p> <ul style="list-style-type: none"> • Austrade • Australian Tax Office (ATO) • chambers of commerce • insurance brokers • peak bodies.
1.3 Research relationships between <i>legislation, regulations, codes of practice, associated standards and accessed information</i> to determine compliance requirements of the business venture	<p>Legislation, regulations, codes of practice, associated standards and accessed information may relate to:</p> <ul style="list-style-type: none"> • Australian Securities and Investments Commission (ASIC) codes of practice • Fairtrade • Fair Work Act 2009 • industry regulations • Privacy Act 1988.
2.1 Identify <i>sources of specialist advice</i> and services relevant to identified compliance requirements and business venture profile	<p>Sources of specialist advice may include:</p> <ul style="list-style-type: none"> • accountants • government departments • industry associations • networks (e.g. business enterprise Centre [BEC]) • solicitors.
3.3 Seek feedback on implemented compliance procedures from <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • accountants • ATO • clients • contractors • government departments • industry associations • networks (e.g. BEC) • potential investors • solicitors.



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Level 4

BSBESB305 Address compliance requirements for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30220 Certificate III in Entrepreneurship and New Business	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Identify, select and access sources of advice on compliance and <i>risk minimisation procedures</i>	<p>Risk minimisation procedures may include:</p> <ul style="list-style-type: none"> developing action plans from internal and external environmental analyses (e.g. SWOT and PESTEL) identifying risk ratings implementing mitigations and controls. <p>Risk minimisation procedures may depend on the organisation.</p>
Assessment Conditions	Notes
<i>Business technology</i> , including internet access for research	<p>Business technology may include:</p> <ul style="list-style-type: none"> cloud-based computing applications customer relationship management (CRM) databases presentation tools (e.g. PowerPoint, Power BI dashboards) spreadsheets word processing tools.



BSBESB401 Research and develop business plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	BSBSS00100 Business Operations Support Skill Set BSBSS00102 Micro Business Skill Set BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify purpose and required <i>components of business plan</i>	<p>Components of business plans may include:</p> <ul style="list-style-type: none"> • competitors • compliance • costs and finances • regulations • resources • understanding customer needs • viability. <p>Components of business plans may depend on the industry.</p>
2.1 Establish resource, <i>legal and compliance requirements</i> according to identified business goals and objectives	<p>Legal and compliance requirements may relate to:</p> <ul style="list-style-type: none"> • government and industry specific regulations • local government and council by-laws • personal liability • Privacy Act 1988 • workcover.
2.5 Analyse draft plan and identify, assess and prioritise <i>internal and external risks</i> according to workplace procedures	<p>Internal and external risks may be identified from:</p> <ul style="list-style-type: none"> • checklists • internal and external environment analyses (e.g. SWOT and PESTEL) • risk matrices.
2.6 Research specialist services and <i>sources of advice and cost</i> according to available resources	<p>Sources may include:</p> <ul style="list-style-type: none"> • accountants • government departments • industry associations • networks (e.g. Business Enterprise Centre [BEC]) • solicitors.
3.5 Identify <i>sources of finance</i> for required liquidity according to business goals and objectives and workplace procedures	<p>Sources of finance may include:</p> <ul style="list-style-type: none"> • angel investors • banks • crowdsourcing • family sources • government grants • insurance brokers • small business loans.
4.4 Identify specific interests and objectives of <i>key stakeholders</i> and confirm their support of planning outcomes	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. clients, suppliers, creditors, debtors, government state bodies) • internal stakeholders (e.g. business partners, employees).



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Level 3

Level 4

BSBESB401 Research and develop business plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance
Skill sets	BSBSS00100 Business Operations Support Skill Set BSBSS00102 Micro Business Skill Set BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Methodology</i> for researching and preparing a business plan	<p>Methodology may include:</p> <ul style="list-style-type: none"> conducting internal and external environmental analyses (e.g. SWOT and PESTEL) research and information gathering.
Common business risks and <i>risk management strategies</i>	<p>Risk management strategies may include:</p> <ul style="list-style-type: none"> developing action plans from internal and external environmental analyses (e.g. SWOT and PESTEL) identifying risk ratings implementing mitigations and controls. <p>Risk management strategies may depend on the organisation.</p>
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> relevant to performance evidence	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> organisational policies and procedures organisational templates style guides.



BSBESB402 Establish legal and risk management requirements of new business ventures

Unit of Competency use within the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>legal structure</i> of business using <i>reliable sources</i>	<p>Legal structures may include:</p> <ul style="list-style-type: none"> • company • partnership • sole trader • trust. <p>Reliable sources may include:</p> <ul style="list-style-type: none"> • accountants • solicitors. <p>Reliable sources may depend on the industry and complexity of the legal structure.</p>
1.2 Identify <i>legislative and regulatory requirements</i> applicable to identified legal structure	<p>Legislative and regulatory requirements may relate to:</p> <ul style="list-style-type: none"> • Fairtrade • Fair Work Act 2009 • industry regulations • organisational and industry codes of conduct • organisational policies and procedures • Privacy Act 1988.
1.3 Analyse identified requirements and their relationship to business and workplace <i>practices and processes</i>	<p>Practices and processes may relate to:</p> <ul style="list-style-type: none"> • awards • Fair Work Act 2009 • work health and safety (WHS).
Knowledge Evidence	Notes
<i>Legal rights and obligations of alternative ownership structures</i>	<p>Legal rights and obligations may relate to:</p> <ul style="list-style-type: none"> • investors • partnership arrangements and agreements • taxation responsibilities. <p>Alternative ownership structures may relate to:</p> <ul style="list-style-type: none"> • shareholders (e.g. voting rights).
Key steps in <i>risk management process</i> , including procedures for developing and implementing business risk treatment plan	<p>Risk management processes may include:</p> <ul style="list-style-type: none"> • hierarchy of controls • mitigation strategies • risk matrices • risk monitoring and assessment.



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BSBESB402 Establish legal and risk management requirements of new business ventures

Unit of Competency use within the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Business technology</i> , including internet access	Business technology may include: <ul style="list-style-type: none"> cloud-based computing applications customer relationship management (CRM) databases presentation tools (e.g. PowerPoint, Power BI dashboards) spreadsheets word processing tools.
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> organisational policies and procedures organisational templates style guides.



BSBESB403 Plan finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	N/A
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Set profit targets according to <i>business venture requirements</i> and workplace procedures	<p>Business venture requirements may depend on:</p> <ul style="list-style-type: none"> business opportunities new businesses and startups.
1.5 Evaluate and select pricing strategies in relation to <i>market conditions</i> to meet profit targets and according to workplace procedures	<p>Market conditions may relate to:</p> <ul style="list-style-type: none"> demand and supply economic cycle.
2.1 Identify <i>working capital requirements</i> necessary to attain profit projections	<p>Working capital requirements may relate to:</p> <ul style="list-style-type: none"> consultation with specialists (e.g. accountants, business financial advisors) sales forecasting and revenue.
2.2 Identify non current asset requirements and consider <i>alternative asset management strategies</i>	<p>Alternative asset management strategies may include:</p> <ul style="list-style-type: none"> leasing renting. <p>Asset management strategies may depend on the organisation and industry.</p>
2.3 Prepare cash flow projections to enable business operation according to business plan and <i>legal requirements</i>	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Fairtrade industry regulations organisational and industry codes of conduct organisational policies and procedures.
3.2 Identify <i>sources of finance</i> for required liquidity according to business goals and objectives and workplace procedures	<p>Sources of finance may include:</p> <ul style="list-style-type: none"> angel investors banks crowdsourcing family sources government grants insurance brokers small business loans.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex information</i> from a range of <i>sources</i>	<p>Complex information may include:</p> <ul style="list-style-type: none"> structure of business loans. <p>Sources may include:</p> <ul style="list-style-type: none"> business loans legislation organisational policies and procedures.
Performance Evidence	Notes
Includes <i>strategies</i> to monitor financial performance of business	<p>Strategies may include:</p> <ul style="list-style-type: none"> budgets cash flow projections.



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BSBESB403 Plan finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	N/A
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Legislative and regulatory requirements</i> relating to business described in performance evidence	Legislative and regulatory requirements may relate to: <ul style="list-style-type: none"> • Fairtrade • Fair Work Act 2009 • industry regulations • organisational and industry codes of conduct • organisational policies and procedures.
<i>Methods for analysing working capital cycles</i>	Methods for analysing working capital cycles may include: <ul style="list-style-type: none"> • cash flows • financial ratios.
Assessment Conditions	Notes
<i>Software</i> for financial calculations	Software may include: <ul style="list-style-type: none"> • cloud-based computing applications • spreadsheets.
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> • organisational policies and procedures • organisational templates • style guides.



BSBESB404 Market new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Establish marketing objectives in consultation with <i>required people</i> and according to business plan and workplace procedures	<p>Required people may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. finance providers, suppliers) internal stakeholders (e.g. employees).
1.4 Establish and evaluate <i>strategy</i> to ensure ethical and cultural appropriateness and alignment with customer and industry expectations	<p>Strategy may relate to:</p> <ul style="list-style-type: none"> legislation (e.g. anti-discrimination) market trends price point analysis product placement research surveys social media.
2.2 Research and evaluate costs and benefits of available <i>distribution channels</i> and <i>customer service strategies</i>	<p>Distribution channels may include:</p> <ul style="list-style-type: none"> e-commerce industry and market reports physical stores social media websites. <p>Customer service strategies may relate to:</p> <ul style="list-style-type: none"> customer experience and feedback surveys market reports social trends. <p>Distribution channels and customer service strategies may depend on the organisation and industry.</p>
3.4 Assess use of <i>digital devices, platforms and technologies</i> for effectiveness in implementing marketing activities	<p>Digital devices, platforms and technologies may include:</p> <ul style="list-style-type: none"> internet social media survey tools virtual meeting technology.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex information</i> from a range of <i>sources</i>	<p>Complex information may include:</p> <ul style="list-style-type: none"> structure of business loans. <p>Sources may include:</p> <ul style="list-style-type: none"> business loans legislation organisational policies and procedures.
Writing: Prepares plans and other workplace <i>documentation</i> using structure, layout and terminology appropriate to audience	<p>Documentation may include:</p> <ul style="list-style-type: none"> business plans market reports.



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BSBESB404 Market new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40320 Certificate IV in Entrepreneurship and New Business	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Performance evaluation methods</i> relating to marketing strategies	Performance evaluation methods may include: <ul style="list-style-type: none"> • analysing competitor strategies • converting enquiries and leads into revenue • observing and evaluating previous and current strategies.
Assessment Conditions	Notes
<i>Business technology</i> , including software for analysis of data	Business technology may include: <ul style="list-style-type: none"> • cloud-based computing applications • customer relationship management (CRM) databases • presentation tools (e.g. PowerPoint, Power BI dashboards) • spreadsheets • word processing tools.



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BSBESB405 Manage compliance for small businesses

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Research internal and external <i>compliance requirements and relevant Australian and international standards</i>	<p>Compliance requirements and relevant Australian and international standards may relate to:</p> <ul style="list-style-type: none"> • Australian Securities and Investments Commission (ASIC) codes of practice • Fairtrade • federal and state laws (e.g. Fair Work Act 2009) • government and industry-specific regulations • local government and council by-laws • personal liability • workcover.
1.2 Research <i>codes of practice and material</i> that interprets obligations and legislative requirements	<p>Codes of practice and material may relate to:</p> <ul style="list-style-type: none"> • legislation for online marketing.
2.2 Validate draft compliance management framework using <i>external expertise and/or sources of advice</i> according to workplace procedures	<p>External expertise and/or sources may include:</p> <ul style="list-style-type: none"> • accountants • Australian Tax Office (ATO) • government departments • industry associations • networks (e.g. Business Enterprise Centre [BEC]) • solicitors.
Performance Evidence	Notes
Develop <i>compliance strategies</i> that address regulatory and legislative requirements	<p>Compliance strategies may relate to:</p> <ul style="list-style-type: none"> • following organisational policies and procedures • recruitment • workcover.



BSBESB405 Manage compliance for small businesses

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Australian and international standards, legislation, regulations, industry and organisational codes of practice</i> specific to small business described in performance evidence	<p>Australian and international standards, legislation, regulations, industry and organisational codes of practice may include:</p> <ul style="list-style-type: none"> • ASIC codes of practice • Fairtrade • Fair Work Act 2009 • government and industry-specific regulations • local government and council by-laws • personal liability • Privacy Act 1988 • workcover.
External professional, industry based and government <i>sources</i> of advice and expertise	<p>Sources may include:</p> <ul style="list-style-type: none"> • accountants • ATO • government departments • industry associations • networks (e.g. Business Enterprise Centre [BEC]) • solicitors.
<i>Methods</i> for carrying out compliance checks and developing compliance strategies	<p>Methods may include:</p> <ul style="list-style-type: none"> • ATO workcover checklists • auditing and quality assurance requirements and checks • compliance checklists • reviewing continuous improvement strategies.
Assessment Conditions	Notes
<i>Business technology</i>	<p>Business technology may include:</p> <ul style="list-style-type: none"> • cloud-based computing applications • customer relationship management (CRM) databases • presentation tools (e.g. PowerPoint, Power BI dashboards) • spreadsheets • word processing tools.
<i>Workplace documentation and resources</i> relevant to performance evidence	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> • organisational policies and procedures • organisational templates • style guides.



BSBESB406 Establish operational strategies and procedures for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>work health and safety (WHS) and environmental issues</i> and implement strategies to minimise risk factors	Work health and safety (WHS) and environmental issues may include: <ul style="list-style-type: none"> council rules on waste disposal ergonomics.
1.3 Review and evaluate, where appropriate, a quality assurance process for the business in line with <i>industry standards, compliance requirements and cultural criteria</i>	Industry standards, compliance requirements and cultural criteria may relate to: <ul style="list-style-type: none"> industry-specific standards (e.g. hygiene, storing and preparing food) quality assurance (e.g. ISO 9000).
2.4 Provide products and/or services according to established legal, ethical cultural and <i>technical standards</i>	Technical standards may relate to: <ul style="list-style-type: none"> Australian packaging rules and requirements.
3.1 Use <i>digital technologies</i> to regularly evaluate and review achievement of operational targets to ensure optimum business performance, according to business goals and objectives	Digital technologies may include: <ul style="list-style-type: none"> accounting systems with automatic reports customer relationship management (CRM) databases employee and customer engagement surveys.
Foundation Skills	Notes
Reading: Evaluates <i>complex text</i> to determine legislative, regulatory and workplace documentation	Complex texts may include: <ul style="list-style-type: none"> legislation organisational policies and procedures.
Knowledge Evidence	Notes
Key features of <i>methods</i> for implementing operation and revenue control systems, including for controlling stock and expenditure	Methods may relate to: <ul style="list-style-type: none"> use of software for implementing and monitoring quality control.
<i>Key features</i> of <i>systems</i> to manage staff, stock, expenditure, services and customer service	Key features may relate to: <ul style="list-style-type: none"> disposal of stock fly-in-fly-out (FIFO) just-in-time obsolete stock right-first-time stock rotation. Systems may include: <ul style="list-style-type: none"> accounting software (e.g. MYOB, Xero) customer relationship management (CRM) databases.
<i>Key features</i> of required technical or specialist skills relevant to business operations	Key features may include: <ul style="list-style-type: none"> training for software or other resources.



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BSBESB406 Establish operational strategies and procedures for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Business equipment and resources, including business technology</i>	Business equipment and resources may include: <ul style="list-style-type: none">• cloud-based computing applications• CRM databases• organisational policies and procedures• organisational templates• presentation tools (e.g. PowerPoint, Power BI dashboards)• spreadsheets• style guides• word processing tools.



BSBESB407 Manage finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>financial information requirements</i> and obtain specialist services, as required	<p>Financial information requirements may relate to:</p> <ul style="list-style-type: none"> profit and loss statements starting capital tax returns.
1.2 Produce financial budgets or projections for each forward period, and distribute to <i>required people</i> according to legal requirements and workplace procedures	<p>Required people may include:</p> <ul style="list-style-type: none"> finance providers. <p>Distributing to required people may be a legal requirement or may be a workplace procedure only, depending on the size of the organisation.</p>
2.3 Calculate and evaluate financial ratios according to own business and/or <i>industry benchmarks</i>	<p>Industry benchmarks may include:</p> <ul style="list-style-type: none"> Certified Public Accountant (CPA) reports independent industry reports.
3.2 Research and implement, with relevant personnel, <i>new and emerging digital technologies</i> to boost business profitability according to business plan	<p>New and emerging digital technologies may include:</p> <ul style="list-style-type: none"> artificial intelligence (AI) automations cloud-based collaborative platforms data lakes integrated systems and networks robotics social media.
Foundation Skills	Notes
Reading: Evaluates <i>complex text</i> to determine legislative, regulatory and workplace documentation	<p>Complex texts may include:</p> <ul style="list-style-type: none"> legislation organisational policies and procedures.
Knowledge Evidence	Notes
<i>Forms, channels and modes of communication</i> used in relation to managing business finances	<p>Forms, channels and modes of communication may include:</p> <ul style="list-style-type: none"> accounting software (e.g. MYOB, Xero) cash flows profit and loss.
Key features of <i>significant financial indicators</i>	<p>Significant financial indicators may include:</p> <ul style="list-style-type: none"> financial ratios (e.g. cost-to-sales) net profit return on investment (ROI).



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BSBESB407 Manage finances for new business ventures

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00104 Small Business Management Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Business equipment and resources, including business technology</i>	<p>Business equipment and resources may include:</p> <ul style="list-style-type: none"> • cloud-based computing applications • customer relationship management (CRM) databases • organisational policies and procedures • organisational templates • presentation tools (e.g. PowerPoint, Power BI dashboards) • spreadsheets • style guides • word processing tools.



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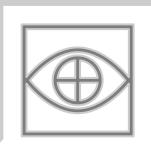
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Financial Literacy Unit Sector Overview

The Financial Literacy (FIN) unit sector incorporates units of competency aimed at supporting individuals to process, manage, maintain and report on various financial transactions, records and plans.

In a workplace environment, an individual that is financially literate is able to interact effectively with the financial resources of an organisation. These skills and knowledge enables the individual to identify, report on, and make strategic decisions relating to financial resources and transactions.



Glossary of common terminology

Code of practice	A code of practice is a document prepared to provide practical guidance on how to comply with a general duty or specific duties according to specified standards or legislation.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Financial Literacy Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Financial Literacy' unit stream, please refer to the interpretation guidance provided on pages 135 - 150. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBFIN301 Process financial transactions**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>errors</i> in <i>source documents</i> for escalation	<p>Errors may relate to:</p> <ul style="list-style-type: none"> • Australian Business Number (ABN) registration • calculations • data entries (e.g. incorrect inventory type or count) • identifying appropriate codes (e.g. product codes) • international purchases (e.g. incorrect Goods and Services Tax [GST] codes, misalignment of purchase order and invoice received). <p>Source documents may include:</p> <ul style="list-style-type: none"> • bank statements • cash receipts journals • direct feeds • general ledgers • inventory journals and invoices • sales journals.
1.2 Enter total transactions into organisational <i>journal system</i> according to <i>organisational policies, procedures and accounting requirements</i>	<p>Journal systems may include:</p> <ul style="list-style-type: none"> • accounting software (e.g. Intuit, MYOB, POS, SAP, Xero) • customer relationship management (CRM) databases • electronic accounting systems. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • data and finance management • distinguishing between individual transactions and summary transactions • recording and reporting • storage, security and access. <p>Accounting requirements may relate to:</p> <ul style="list-style-type: none"> • account coding and allocation • GST.



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BSBFIN301 Process financial transactions

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets textual information from a range of <i>sources</i> to confirm all necessary job requirements	<p>Sources may include:</p> <ul style="list-style-type: none"> • legislation (e.g. privacy, data) • manuals (e.g. software, training) • organisational and industry codes of practice • organisational policies and procedures • websites (e.g. Australian Tax Office [ATO], intranet, accountant portals).
Technology: Uses <i>digital technology</i> to access, filter, compile, integrate and logically present complex information from multiple sources	<p>Digital technology may include:</p> <ul style="list-style-type: none"> • accounting software (e.g. Intuit, MYOB, POS, SAP, Xero) • CRM databases • electronic accounting systems • spreadsheets • proprietary systems • websites (e.g. ATO, intranet, accountant portals). <p>Individuals should consider security in relation to digital technologies.</p>
Performance Evidence	Notes
Enter data into journal and <i>subsidiary ledger system</i>	<p>Data may be automatically populated into subsidiary ledger systems based on entries in the journal.</p> <p>Accuracy should be ensured when entering data.</p>



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BSBFIN301 Process financial transactions

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of relevant <i>legislation and regulations, standards and codes of practice</i> affecting business financial operations	<p>Legislation and regulations, standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> • accounting • ATO • ethical principles • GST legislation • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
<i>Accuracy and authorisation requirements</i> for source documents	<p>Accuracy and authorisation requirements may relate to:</p> <ul style="list-style-type: none"> • authoritative sources (e.g. financial managers, business owners, purchasing officers) • contractual obligations • organisational policies and procedures (e.g. approvals for payment of purchases).
<i>Organisational policies and procedures</i> for communication related to outstanding debtors	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • administering outstanding debtors • time frames. <p>Communication methods may depend on the size of the organisation (e.g. manual telephone calls and automatic emails).</p>
<i>Key features</i> of organisational accounting systems and procedures	<p>Key features may include:</p> <ul style="list-style-type: none"> • compliance structures • organisational requirements.
<i>Credit terms</i> according to credit policies and procedures	<p>Credit terms may relate to:</p> <ul style="list-style-type: none"> • background and credit checks • evolving legislation • monitoring credit limits.
Applicable <i>accounting standard</i> related to outstanding debtors	<p>Accounting standards may relate to:</p> <ul style="list-style-type: none"> • ageing debts • organisational policies and procedures • recognising bad and doubtful debts • time considerations.
Assessment Conditions	Notes
<i>Accounting software</i>	<p>Accounting software may include:</p> <ul style="list-style-type: none"> • Intuit • MYOB • POS • SAP • Xero.



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BSBFIN302 Maintain financial records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB40120 Certificate IV in Business
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify general ledger accounts affected according to <i>organisational policies, procedures and accounting standards</i>	<p>Organisational policies, procedures may relate to:</p> <ul style="list-style-type: none"> • data and finance management • distinguishing between individual transactions and summary transactions • recording and reporting • storage, security and access. <p>Accounting standards may relate to:</p> <ul style="list-style-type: none"> • ageing debts • organisational policies and procedures • recognising bad and doubtful debts • time considerations.
2.3 <i>Rectify</i> any discrepancies and <i>escalate</i> , where required if outside scope of individual authority	<p>Rectifying may include:</p> <ul style="list-style-type: none"> • seeking authorisation. <p>Escalating may include:</p> <ul style="list-style-type: none"> • following organisational procedures and reporting structures • involving key stakeholders applicable to type of transaction. <p>Individual authority may depend on job description and level of authority.</p>
3.3 <i>Check</i> general ledger for accuracy of information and <i>despatch</i> to <i>relevant stakeholders</i> , where required	<p>Checking may include:</p> <ul style="list-style-type: none"> • reconciling and verifying transactions. <p>Despatching may include:</p> <ul style="list-style-type: none"> • reporting on or extracting information (e.g.expenses) within the general ledger. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • accountants • board members • project managers • managers.
3.4 <i>Check</i> trial balance meets <i>accounting equation requirements</i>	<p>Checking may include:</p> <ul style="list-style-type: none"> • identifying coding inaccuracies • verifying and rectifying transactions. <p>Accounting equation requirements may include:</p> <ul style="list-style-type: none"> • assets - liabilities = equity • equity = investment [+ or - profit/loss (income-expenses)].



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BSBFIN302 Maintain financial records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB40120 Certificate IV in Business
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital technologies</i> to access, record, store, organise and compile data as required	Digital technologies may include: <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems mobile devices.
Knowledge Evidence	Notes
Key provisions of relevant <i>legislation, codes of practice and national standards</i> that may affect both: <ul style="list-style-type: none"> financial record keeping aspects of financial operations 	Legislation, codes of practice and national standards may relate to: <ul style="list-style-type: none"> accounting Australian Tax Office (ATO) ethical principles GST legislation local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
<i>Key components</i> of organisational accounting systems and procedures	Key components may include: <ul style="list-style-type: none"> compliance structures organisational requirements.
<i>Procedures</i> for checking for errors or discrepancies	Procedures may relate to: <ul style="list-style-type: none"> checking source documents against journals extracting sales journals separation of duties. <p>Source documents may be digitally-based or paper-based.</p>
<i>Organisational policies and procedures</i> relating to maintaining financial records	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> ATO audit requirements data and finance management distinguishing between individual transactions and summary transactions recording and reporting storage, security and access.
<i>Methods</i> of presenting financial data	Methods may include: <ul style="list-style-type: none"> extracting electronic data into spreadsheet generating visualisations and graphs specialised reports for management.
<i>Accounting software</i> used in the maintenance of financial records	Accounting software may include: <ul style="list-style-type: none"> Intuit MYOB POS SAP Xero.



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BSBFIN401 Report on financial activity

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Marketing BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 <i>Prepare</i> a register of assets from fixed asset transactions according to accounting, <i>legislative and organisational requirements</i>	<p>Preparing may include:</p> <ul style="list-style-type: none"> developing an asset register to record new and disposed assets and depreciation. <p>Legislative and organisational requirements may relate to:</p> <ul style="list-style-type: none"> accounting standards (e.g. AASB 116) Australian Tax Office (ATO).
1.2 Calculate depreciation according to <i>legislative and organisational requirements</i>	<p>Legislative and organisational requirements may relate to:</p> <ul style="list-style-type: none"> accounting standards (e.g. AASB 116) ATO.
1.3 Make, record and disclose <i>asset and liability valuations</i> in compliance with accounting standards	<p>Asset and liability valuations may relate to:</p> <ul style="list-style-type: none"> cost and market value effective life of an asset outstanding payments.
1.4 Refer discrepancies, unusual features or queries to <i>appropriate authority</i> where they cannot be resolved	<p>Appropriate authority may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. agencies, networking groups) internal stakeholders (e.g. head accountants, managers).
2.4 Review data for errors and compliance with <i>statutory requirements</i> and organisational procedures, and amend as required	<p>Statutory requirements may relate to:</p> <ul style="list-style-type: none"> accounting reports. <p>Statutory requirements may depend on the size of the organisation.</p>
3.4 Correct or refer errors for resolution according to statutory and <i>ethical requirements</i> and organisational procedures	<p>Ethical requirements may relate to:</p> <ul style="list-style-type: none"> organisational and industry codes of practice risk management Tax Practitioners Board (TPB) code of conduct.
Foundation Skills	Notes
Numeracy: Establishes <i>criteria and categories</i> for financial management purposes and monitors activities on a regular basis	<p>Criteria and categories may relate to:</p> <ul style="list-style-type: none"> balance sheets ledgers profit and loss stock trial balance.
Technology: Uses <i>digital technology</i> to access, filter, compile, integrate and logically present complex information from multiple sources	<p>Digital technology may include:</p> <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems integrated inventory systems.



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BSBFIN401 Report on financial activity

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Marketing BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Provisions of relevant <i>legislation, regulations, standards and codes of practice</i> relevant to financial operations, taxable transactions and reporting requirements	<p>Legislation, regulations, standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> accounting ATO ethical principles GST legislation local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
<i>Components</i> of organisational accounting systems	<p>Components may include:</p> <ul style="list-style-type: none"> compliance structures organisational requirements.
<i>Techniques</i> used for financial forecasting and analysis	<p>Techniques may include:</p> <ul style="list-style-type: none"> integrated analysis techniques within accounting software navigating reports and knowledge of operating systems and software sales analysis (e.g. forecasted seasonal sales) using digital technologies and reports for detailed analysis. <p>Techniques may depend on organisational recording systems.</p>
<i>Options, methods and practices</i> for deductions, benefits and depreciations	<p>Options, methods and practices may relate to:</p> <ul style="list-style-type: none"> accounting information ATO.
Industry-standard <i>methods and formats</i> used to present financial data	<p>Methods may include:</p> <ul style="list-style-type: none"> benchmarking extracting profit and loss. <p>Formats may include:</p> <ul style="list-style-type: none"> graphs and tables presenting different periods of time.
Assessment Conditions	Notes
<i>Accounting software</i>	<p>Accounting software may include:</p> <ul style="list-style-type: none"> Intuit MYOB POS SAP Xero.



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BSBFIN501 Manage budgets and financial plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Evaluate budget and <i>financial plan outcomes</i> with <i>required organisational personnel</i>	<p>Financial plan outcomes may include:</p> <ul style="list-style-type: none"> • cash flows • linking budgets and strategic plans • variance analyses. <p>Required organisational personnel may include:</p> <ul style="list-style-type: none"> • cross-organisational departments team members • senior management • team members.
2.1 Communicate details of agreed budget and financial plans to <i>relevant team members</i>	<p>Relevant team members may include:</p> <ul style="list-style-type: none"> • cross-organisational departments • senior management.
2.2 <i>Support</i> team members to access <i>resources and systems</i> to perform required roles	<p>Support may relate to:</p> <ul style="list-style-type: none"> • facilitating training • mentoring • producing visualisations to highlight data insights • putting standards in place • referring to organisational procedure documents. <p>Resources and systems may include:</p> <ul style="list-style-type: none"> • accounting systems • business and marketing plans • customer relationship management (CRM) databases • internal intranet • marketing and advertising statistics • spreadsheets.
Foundation Skills	Notes
Technology: Uses a range of <i>digital technologies</i> to access, filter, compile, integrate and logically present complex information from multiple sources	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> • accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) • cloud-based accounting solutions and systems • integrated inventory systems.
Performance Evidence	Notes
Meet <i>record-keeping requirements</i> for Australian Taxation Office (ATO) and for auditing purposes	<p>Record-keeping requirements may relate to:</p> <ul style="list-style-type: none"> • Australian Tax Office (ATO) requirements • organisational policies and procedures • record retention • time-keeping.



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BSBFIN501 Manage budgets and financial plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Basic accounting principles</i>	<p>Basic accounting principles may include:</p> <ul style="list-style-type: none"> • conventions • revenue recognition • understanding how accounting operates in different areas (e.g. assets, liabilities, work groups, organisational divisions).
<i>Types of budgets and financial plans</i>	<p>Types of budgets and financial plans may include:</p> <ul style="list-style-type: none"> • cash flows • key performance indicators (KPIs) • marketing • milestones • operations • production • projects • sales and purchases • stock holding. <p>Budgets and financial plans may depend on the organisation and role.</p>
<i>Legislation and current ATO requirements, including the Goods and Services Tax (GST)</i>	<p>Legislation may relate to:</p> <ul style="list-style-type: none"> • accounting standards (e.g. AASB 116).
<i>Principles for managing work teams</i>	<p>Principles may relate to:</p> <ul style="list-style-type: none"> • managing team capacity • recognising team member skills.
Assessment Conditions	Notes
<i>Workplace policies and procedures</i>	<p>Policies and procedures may relate to:</p> <ul style="list-style-type: none"> • ATO audit requirements • data and finance management • recording and reporting • storage, security and access.



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BSBFIN502 Manage financial compliance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>financial compliance legislation, regulations, codes of conduct</i> applicable to organisation or work area	<p>Legislation may relate to:</p> <ul style="list-style-type: none"> • Corporations Act 2001 • Fair Work Act 2009. <p>Regulations may relate to:</p> <ul style="list-style-type: none"> • payroll management regulations • records management regulations. <p>Codes of conduct may relate to:</p> <ul style="list-style-type: none"> • governance compliance codes of conduct • accounting codes of practice <p>Legislation, regulations, codes of conduct may depend on the industry.</p>
1.5 Establish <i>indicators</i> to measure <i>financial compliance</i>	<p>Indicators may include:</p> <ul style="list-style-type: none"> • benchmarking • standard comparison ratios. <p>Financial compliance may relate to:</p> <ul style="list-style-type: none"> • governance • organisational requirements • reporting timeframes.
2.2 Communicate <i>financial compliance strategy</i> to <i>relevant staff</i>	<p>Financial compliance strategy may include:</p> <ul style="list-style-type: none"> • audit processes and procedures • audit reports • compliance registers • improvement registers • regulatory reporting. <p>Relevant staff may include:</p> <ul style="list-style-type: none"> • auditors • boards • executive teams • external stakeholders (e.g. Australian Tax Office [ATO], Australian Securities and Investments Commission [ASIC]) • management. <p>Communication should be timely and in an appropriate format.</p>



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BSBFIN502 Manage financial compliance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Learning: Identifies organisational issues and uses <i>formal thinking techniques</i> to develop a range of possible solutions	Formal thinking techniques may include: <ul style="list-style-type: none"> brainstorming creative problem solving lateral thinking (e.g. six thinking hats) mind mapping.
Writing: Prepares <i>documents</i> using format, content and layout appropriate to audience, purpose and regulatory requirements	Documents may include: <ul style="list-style-type: none"> budgets financial plans.
Technology: Uses a range of <i>digital technology</i> to access, filter, compile, integrate and logically present complex information from multiple sources	Digital technology may include: <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems integrated inventory systems.
Performance Evidence	Notes
Interpret and analyse <i>operational and feedback data</i> relating to compliance	Operational and feedback data may include: <ul style="list-style-type: none"> continuous improvement strategies responses to feedback.
Knowledge Evidence	Notes
<i>Methods and tools for recording, reporting and managing compliance</i>	Methods may include: <ul style="list-style-type: none"> checklists software processes for regular updates. Tools may include: <ul style="list-style-type: none"> action plans. Recording, reporting and managing compliance may include: <ul style="list-style-type: none"> outlining potential legal liabilities (e.g. emissions) undertaking corrective and remedial action. Compliance may relate to organisations or legislation.
<i>Procedures for conducting risk analysis</i>	Procedures may include: <ul style="list-style-type: none"> following the five basic steps of risk analysis developing a risk matrix undertaking a PESTEL analysis.
<i>Risk mitigation strategies</i>	Risk mitigation strategies may include: <ul style="list-style-type: none"> communication plans hierarchy of controls timely lodgement.



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BSBFIN502 Manage financial compliance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Computer equipment and software</i> required for the demonstration of the performance evidence	Computer equipment and software may include: <ul style="list-style-type: none"> • accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) • cloud-based accounting solutions and systems • integrated inventory systems.



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BSBFIN601 Manage organisational finances

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management	BSB50120 Diploma of Business BSB60720 Advanced Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Review <i>statutory requirements</i> for compliance and liabilities for tax	<p>Statutory requirements may relate to:</p> <ul style="list-style-type: none"> accounting reports. <p>Statutory requirements may depend on the size of the organisation.</p>
1.4 Analyse existing software and its <i>suitability for financial management</i>	<p>Suitability for financial management may relate to:</p> <ul style="list-style-type: none"> cloud-based software integration capabilities.
3.1 Identify organisational and statutory <i>financial reporting requirements</i>	<p>Financial reporting requirements may relate to:</p> <ul style="list-style-type: none"> organisational set-up and structure (e.g. partnerships, assets).
Foundation Skills	Notes
Reading: Analyses and evaluates complex organisational information and <i>legislative requirements</i> to assist with financial decision making	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> accounting standards (e.g. AASB 116) Australian Tax Office (ATO).
Technology: Uses a range of <i>digital technology</i> to access, filter, compile, integrate and logically present complex information from multiple sources	<p>Digital technology may include:</p> <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems integrated inventory systems.
Technology: Investigates <i>new digital technologies</i> and applications to manage and manipulate data	<p>New digital technologies may include:</p> <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems integrated inventory systems.



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BSBFIN601 Manage organisational finances**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management	BSB50120 Diploma of Business BSB60720 Advanced Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Processes to establish and review profits and losses from financial statements</i>	Processes may include: <ul style="list-style-type: none"> analysing income, sales, cost of goods sold (COGS) calculations.
<i>Requirements for financial probity</i>	Requirements may relate to: <ul style="list-style-type: none"> ethics declarations insolvency or bankruptcy legislation.
<i>Principles of accounting and financial systems</i>	Principles may relate to: <ul style="list-style-type: none"> conventions revenue recognition understanding how accounting operates in different areas (e.g. assets, liabilities, work groups, organisational divisions).
<i>Key functions of financial management software</i>	Key functions may include: <ul style="list-style-type: none"> cloud-based integration capabilities.
<i>Key components of a financial budget</i>	Key components may include: <ul style="list-style-type: none"> compliance structures organisational requirements.
<i>Legislation and conventions relevant to financial management in organisation</i>	Legislation and conventions may relate to: <ul style="list-style-type: none"> corporations financial services. <p>Legislation and conventions may depend on the organisation.</p>
Assessment Conditions	Notes
<i>Financial management software</i>	Financial management software may include: <ul style="list-style-type: none"> accounting software (e.g. Intuit, Xero, MYOB, POS, SAP) cloud-based accounting solutions and systems integrated inventory systems.



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BSBFIN801 Lead financial strategy development

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Establish capacity of existing financial systems by analysing <i>financial reports</i>	<p>Financial reports may relate to:</p> <ul style="list-style-type: none"> • budgets • balance sheets • cash flows • feeder subsystems (e.g. customer relationship management [CRM] databases) • income.
1.3 Consult <i>relevant stakeholders</i> , including financial advisers, about financial information to support decisions	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • boards • executive boards • external consultants • software providers.
1.4 Prepare recommendations and <i>assessment indicators</i> for budget expenditure or for modification of existing projections according to organisational and <i>legislative requirements</i>	<p>Assessment indicators may include:</p> <ul style="list-style-type: none"> • cost-benefit analysis • non-financial and intangible benefits • return on investment (ROI). <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • accounting standards (e.g. AASB 116) • Australian Tax Office (ATO).
1.5 Present recommendations to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • boards • executive boards • external consultants • software providers.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex text</i> from a variety of sources to determine business requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • reports (e.g. government and economic trends, industry, summary or overview).
Performance Evidence	Notes
Analyse and use <i>budget systems and reporting processes</i>	<p>Budget systems and reporting processes may relate to:</p> <ul style="list-style-type: none"> • accounting • business and marketing plans • spreadsheets.



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BSBFIN801 Lead financial strategy development

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Financial risk factors and <i>mitigation procedures</i>	<p>Mitigation procedures may include:</p> <ul style="list-style-type: none"> • communication plans • hierarchy of controls • risk matrices • timely lodgement.
<i>Compliance requirements</i> relating to managing financial resources, including legislative and regulatory responsibilities	<p>Compliance requirements may relate to:</p> <ul style="list-style-type: none"> • accounting codes of practice • Fair Work Act 2009 • governance compliance (e.g. corporations law) • payroll management • records management.
<i>Financial and accounting principles</i> relating to analysing and interpreting financial reports and resources	<p>Financial and accounting principles may include:</p> <ul style="list-style-type: none"> • conventions • revenue recognition • understanding how accounting operates in different areas (e.g. assets, liabilities, work groups, organisational divisions).
Financial, accounting and economic terminology and <i>systems</i> relevant to financial strategy	<p>Systems may relate to:</p> <ul style="list-style-type: none"> • efficient and effective processes • reviewing the right tools and processes. <p>Individuals should understand changes in terminology.</p>
<i>Techniques</i> for calculating and analysing financial data and procedures for their applications	<p>Techniques may include:</p> <ul style="list-style-type: none"> • integrated analysis techniques within accounting software • digital technologies and reports used for detailed analysis • navigating reports and knowledge of operating systems and software • sales analysis (e.g. forecasted seasonal sales). <p>Techniques may depend on organisational recording system.</p>
Assessment Conditions	Notes
<i>Financial data and documentation</i>	<p>Financial data and documentation may include:</p> <ul style="list-style-type: none"> • balance sheets • budgets • cash flows • financial reports.



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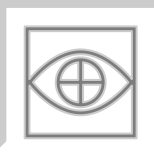
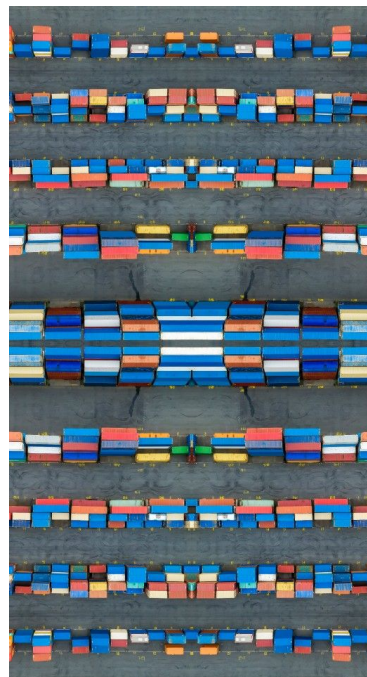
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Human Resources Unit Sector Overview

The Human Resources (HRM) unit sector incorporates specialist units of competency aimed at supporting and managing the human resources functions of an organisation.

Relevant job roles may include human resources officer, human resources coordinator, payroll officer, human resources consultant, human resources advisor, human resources business partner, human resources manager and senior human resources business partner.



Glossary of common terminology

Human Resource Information System (HRIS)	There are many industry-recognised Human Resources Information Systems, these may include: SAP HCM, Fusion5, Ascender, ELMO, ichris.
Organisational human resources objectives	Organisational human resources objectives may be based on: <ul style="list-style-type: none"> workforce succession planning staff retention rates workforce mobility employee engagement workforce diversity.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Organisational strategic and operational plans	Organisational strategic and operational plans may include an organisation's: <ul style="list-style-type: none"> vision, mission and values high-level goals short and long term budget work plan.

Human Resources Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Human Resources' unit stream, please refer to the interpretation guidance provided on pages 153 - 183. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBHRM411 Administer performance development processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	N/A
Skill sets	BSBSS00105 Human Resources Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assist <i>relevant stakeholders</i> in reviewing the performance management system to ensure it aligns with the strategic direction of the organisation	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • human resource managers • human resource officers • senior management • supervisors • unions and employer organisations.
Foundation Skills	Notes
Reading: Critically evaluates and applies content from a range of <i>structurally complex texts</i> to support performance management processes	<p>Structurally complex texts may include:</p> <ul style="list-style-type: none"> • awards and agreements • legislation • organisational and industry codes of conduct • organisational policies and procedures • performance dashboards • performance management documentation • strategic and operational plans.
Oral communication: Selects and uses <i>appropriate conventions and protocols when communicating with others</i> in a range of work contexts	<p>Appropriate conventions and protocols when communicating with others may include:</p> <ul style="list-style-type: none"> • active and critical listening • conflict management and resolution • professional conduct. <p>Appropriate conventions and protocols for communication may depend on organisational policies and procedures (e.g. diversity and inclusion).</p>
Knowledge Evidence	Notes
<i>Strengths and weaknesses of a performance development system</i>	<p>Strengths and weaknesses of a performance development system may relate to:</p> <ul style="list-style-type: none"> • ease of use • fairness and equity • internal and external consistency and coherency • transparency.
<i>Rewards and incentives schemes</i>	<p>Rewards and incentives schemes may include:</p> <ul style="list-style-type: none"> • flexible working arrangements • intrinsic and extrinsic motivation • monetary incentives (e.g. profit sharing, bonuses, time in lieu) • tangible recognition (formal or informal).



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BSBHRM411 Administer performance development processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	N/A
Skill sets	BSBSS00105 Human Resources Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Strategies to provide feedback and training</i> in relation to the performance development system	<p>Strategies to provide feedback and training may include:</p> <ul style="list-style-type: none"> 360 degree loop managing upwards. <p>Strategies should focus on providing feedback about improving the performance development system, not about an individual involved in the system.</p>
<i>Mechanisms to collect and analyse data</i> to review performance development system	<p>Mechanisms to collect data may include:</p> <ul style="list-style-type: none"> internal software to assist in collation, review and storage of data organisational health surveys. <p>Mechanisms may depend on the size of organisation.</p> <p>Data may include:</p> <ul style="list-style-type: none"> key performance indicator (KPI) data samples of completed performance appraisals.
Assessment Conditions	Notes
Human resource <i>policies, procedures and documentation</i> relevant to performance development and feedback	<p>Policies, procedures and documentation may include:</p> <ul style="list-style-type: none"> internal organisational policies and procedures (e.g. performance, grievance, conflict resolution or learning and development policies, which inform procedures) local, state and territory work health and safety (WHS) legislation state, territory and federal guidance regarding workplace health and safety (e.g. Safe Work Australia guidance on Good Work Design) state, territory and federal workplace legislation relating to organisational performance development processes (e.g. Fair Work Act 2009, Anti-Discrimination Law).



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BSBHRM412 Support employee and industrial relations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	BSB50120 Diploma of Business
Skill sets	BSBSS00105 Human Resources Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Source and share applicable legislation, agreements, policies and procedures with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • executive boards • executive directors • human resource managers • human resource officers • owners • senior management • supervisors.
1.4 Communicate the organisation's ER and IR procedures to <i>relevant stakeholders</i> according to relevant organisation, enterprise and statutory requirements	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. employer organisations, industry peak bodies and associations, unions, workplace relations specialists) • internal stakeholders: those listed as "relevant stakeholders" above.
2.4 Record and maintain <i>relevant documents</i>	<p>Relevant documents may include:</p> <ul style="list-style-type: none"> • documentation of negotiations carried out • employment contracts • enterprise bargaining process documents • grievance documents • performance counselling documents • warning letters.
3.1 Identify relevant grievance and <i>conflict resolution processes</i>	<p>Conflict resolution processes may involve:</p> <ul style="list-style-type: none"> • appropriate recordkeeping • Fair Work resources • investigation • grievance handling • mediation • privacy and confidentiality.

Foundation Skills

Notes

Reading: Comprehends and analyses *complex texts* from a variety of sources and records to determine relevance to requirements or review implementation of strategies

Complex texts may include:

- awards and agreements
- benchbooks from Fair Work
- legislation
- organisational and industry codes of conduct
- organisational policies and procedures
- strategic and operational plans.



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BSBHRM412 Support employee and industrial relations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	BSB50120 Diploma of Business
Skill sets	BSBSS00105 Human Resources Foundations Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills

Oral communication: Selects and uses *appropriate conventions and protocols when communicating with co-workers* in a range of work contexts

Notes

Appropriate conventions and protocols when communicating with co-workers may include:

- active and critical listening
- conflict management and resolution
- professional conduct.

Appropriate conventions and protocols for communication may depend on organisational policies and procedures (e.g. diversity and inclusion).

Performance Evidence

Locate *information required to identify relevant legislation, agreements, policies and procedures*

Notes

Information required to identify relevant legislation, agreements, policies and procedures may include:

- Fair Work resources (e.g. [Fair Work Act 2009](#), [Fair Work Regulations 2009](#), [Fair Work Commission Rules 2013](#)).

Use *strategies to monitor and gather feedback* on the implementation of industrial relations policies and procedures

Strategies to monitor and gather feedback may include:

- employee surveys
- exit interviews
- tracking statistics (e.g. incidents of industrial action taken, number of grievances, turnover figures).

Knowledge Evidence

Relevant *legislation, codes of practice* and national standards

Notes

Legislation may include:

- [anti-discrimination legislation](#)
- Fair Work legislation, including the [Fair Work Act 2009](#), [Fair Work Regulations 2009](#), [Fair Work Commission Rules 2013](#)
- local, state and territory [work health and safety \(WHS\) legislation](#)
- [Privacy Act 1988](#)
- [Small Business Fair Dismissal Code](#)
- state and territory legislation relating to employment.

Codes of practice may include:

- non-prescribed voluntary codes
- organisational codes
- prescribed mandatory industry codes.

Relevant legislation, codes of practice and national standards may vary according to industry.

Key *sources of expert advice* relevant to performance evidence.

Sources of expert advice may include:

- Fair Work representatives
- industry bodies (e.g. Australian Human Resources Institute [AHRI])
- lawyers
- mediators
- unions.



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BSBHRM413 Support the learning and development of teams and individuals**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Collect information on performance of team members from <i>relevant sources</i>	Relevant sources may include: <ul style="list-style-type: none"> complaint and grievance documents key performance indicator (KPI) data observational data operational data performance reviews productivity data.
2.1 Develop <i>collaborative learning plans</i> to match skill needs of individuals and groups and match the competency standards relevant to the industry	Collaborative learning plans may relate to: <ul style="list-style-type: none"> learning needs analysis training needs identification.
Foundation Skills	Notes
Reading: Analyses <i>textual information</i> from a range of sources to identify organisational requirements	Textual information may relate to: <ul style="list-style-type: none"> organisational mission and value statements organisational policies and procedures strategic plans.
Teamwork: Collaborates with <i>others</i> to achieve joint outcomes, playing an active role in facilitating effective group interaction	Others may include: <ul style="list-style-type: none"> colleagues learning and development teams managers training organisations.
Performance Evidence	Notes
Collect <i>data</i> on team and individual and team development needs	Data may include: <ul style="list-style-type: none"> competency standards KPI data samples of completed performance appraisals succession data.



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BSBHRM414 Use human resources information systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40420 Certificate IV in Human Resource Management BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>HRIS data requirements</i>	<p>HRIS data requirements may include:</p> <ul style="list-style-type: none"> employee information (e.g. position descriptions, wage information, leave, attendance, training) information technology (IT) resource availability position data (e.g. full-time equivalent [FTE] metrics) privacy and confidentiality requirements.
1.2 Collect, and collate data of <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. employer organisations, industry peak bodies and associations, unions, workplace relations specialists) internal stakeholders (e.g. colleagues, human resource managers, human resource officers, senior management, supervisors).
3.2 Obtain feedback from <i>relevant stakeholder</i> about the system performance	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> IT departments managers supervisors system vendors.
Foundation Skills	Notes
Reading: Interprets <i>textual information</i> obtained from a range of sources and determines how content may be applied to individuals and organisational requirements	<p>Textual information may include:</p> <ul style="list-style-type: none"> HRIS user guides.
Teamwork: Collaborates with <i>others</i> to achieve joint outcomes, playing an active role in facilitating effective group interaction	<p>Others may include:</p> <ul style="list-style-type: none"> colleagues learning and development teams managers training organisations.
Knowledge Evidence	Notes
<i>Organisational policies, procedures, protocols and processes</i> applicable to using HRIS	<p>Organisational policies, procedures, protocols and processes may relate to:</p> <ul style="list-style-type: none"> audit requirements authorisation and access.



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BSBHRM414 Use human resources information systems**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40420 Certificate IV in Human Resource Management BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
Relevant <i>legislation</i> , regulations and <i>codes of practice</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • Fair Work legislation, including the Fair Work Act 2009, Fair Work Regulations 2009, Fair Work Commission Rules 2013 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988 • state and territory legislation relating to employment. <p>Codes of practice may include:</p> <ul style="list-style-type: none"> • non-prescribed voluntary codes • organisational codes • prescribed mandatory industry codes. <p>Relevant legislation and codes of practice may vary according to industry.</p>



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BSBHRM415 Coordinate recruitment and onboarding

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult with <i>relevant stakeholders</i> about job descriptions, selection criteria and workforce strategy	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. employer organisations, industry peak bodies and associations, recruitment agencies, workplace relations specialists) internal stakeholders (e.g. colleagues, human resource managers, human resource officers, senior management, supervisors, team leaders).
2.4 <i>Obtain relevant additional information</i> from candidates	<p>Obtaining relevant additional information may include:</p> <ul style="list-style-type: none"> understanding what is appropriate information to collect.
Foundation Skills	Notes
Reading: Interprets a range of <i>textual information</i> from a variety of sources and analyses and reviews for compliance and suitability	<p>Textual information may include:</p> <ul style="list-style-type: none"> Fair Work Ombudsman resources position descriptions.
Self-management: Selects and uses <i>appropriate conventions and protocols when communicating with candidates or clients</i>	<p>Appropriate conventions and protocols when communicating with with candidates or clients may include:</p> <ul style="list-style-type: none"> active and critical listening conflict management and resolution professional conduct. <p>Appropriate conventions and protocols for communication may depend on organisational policies and procedures (e.g. diversity and inclusion).</p>



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BSBHRM415 Coordinate recruitment and onboarding

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40420 Certificate IV in Human Resource Management	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of relevant <i>legislation, regulations, standards and codes of practice</i> that affect employment agencies and organisations recruiting processes	<p>Legislation may include:</p> <ul style="list-style-type: none"> local, state and territory work health and safety (WHS) legislation state, territory and federal workplace legislation relating to organisational recruitment processes (e.g. Fair Work Act 2009, anti-discrimination legislation, Privacy Act 1988). <p>Regulations and standards may relate to:</p> <ul style="list-style-type: none"> awards and agreements diversity and inclusion Fair Work Regulations 2009. <p>Codes of practice may include:</p> <ul style="list-style-type: none"> non-prescribed voluntary codes organisational codes prescribed mandatory industry codes. <p>Relevant legislation, regulations, standards and codes of practice may vary according to industry.</p>
<i>Methods to assess and report on candidates according to organisational procedures</i>	<p>Methods to assess and report on candidates may include:</p> <ul style="list-style-type: none"> assessment centres interview processes psychometric testing reference checking selection criteria. <p>Organisational procedures may include:</p> <ul style="list-style-type: none"> digital and artificial intelligence (AI) recruitment processes outsourcing for recruitment.



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BSBHRM416 Process payroll

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Respond to payroll enquiries according to <i>organisational and legislative requirements</i>	<p>Organisational and legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Australian Tax Office (ATO) requirements • enterprise agreements and modern awards • individual employment contracts • payroll legislative obligations (e.g. long service leave acts, Fair Work Act 2009, Fair Work Regulations 2009, Fair Work Commission Rules 2013) • Privacy Act 1988 • superannuation • workers compensation. <p>Relevant organisational requirements regarding payroll processes may vary according to industry.</p>
3.2 <i>Provide payroll information</i> according to organisational and legislative requirements	<p>Providing payroll information may involve:</p> <ul style="list-style-type: none"> • superannuation implications • tax implications.
3.3 Ensure all enquiries outside area of responsibility and knowledge are referred to <i>designated persons</i> for resolution	<p>Designated persons may include:</p> <ul style="list-style-type: none"> • external persons (e.g. ATO, Fair Work Ombudsman, legal employment services) • internal persons (e.g. management, supervisors).
Foundation Skills	Notes
Reading: Interprets a range of <i>textual information</i> to determine activities required	<p>Textual information may include:</p> <ul style="list-style-type: none"> • ATO documents • Fair Work resources.
Technology: Uses <i>digital technologies</i> to access, record, store, organise and compile data, as required	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> • payroll systems and software • spreadsheets (e.g. Excel, Google Sheets).



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BSBHRM417 Support human resources functions and processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify <i>information sources</i> to obtain human resource data and information	Information sources may include: <ul style="list-style-type: none"> Australian Bureau of Statistics (ABS) industry surveys.
2.3 Identify <i>sustainability issues</i> that relate to human resource functions	Sustainability issues may relate to: <ul style="list-style-type: none"> financial sustainability people-based sustainability (e.g. retention of staff) social sustainability (e.g. Corporate Social Responsibility [CSR]).
Foundation Skills	Notes
Reading: Critically evaluates and applies content from a range of structurally <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> organisational mission and value statements organisational policies and procedures relevant legislation service level agreements (SLAs) strategic plans.
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> human resource information systems (HRIS) virtual meeting technology.
Knowledge Evidence	Notes
Key provisions of <i>legal and compliance requirements</i> that apply to the organisation	Legal and compliance requirements may relate to: <ul style="list-style-type: none"> anti-discrimination legislation Fair Work legislation, including the Fair Work Act 2009, Fair Work Regulations 2009, Fair Work Commission Rules 2013 local, state and territory work health and safety (WHS) legislation organisational and industry codes of conduct Privacy Act 1988 state and territory legislation relating to employment.
Types of <i>human resources networks</i> including local, state or territory, national and international	Human resources networks may include: <ul style="list-style-type: none"> Australian Human Resources Institute (AHRI) industry networks.
Assessment Conditions	Notes
<i>Workforce data</i>	Workforce data may include: <ul style="list-style-type: none"> competency standards key performance indicator (KPI) data samples of completed performance appraisals succession data.



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BSBHRM521 Facilitate performance development processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop <i>objectives for performance development processes</i>	<p>Objectives for performance development processes may include:</p> <ul style="list-style-type: none"> • effective communication channels to set clear expectations • succession and staff development • transparency. <p>Objectives may depend on individual position descriptions and may align with the organisational strategic plans.</p>
1.3 Consult with <i>relevant stakeholders</i> about the processes and agree on process features	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. unions, industry associations) • internal stakeholders (e.g. colleagues, employee relations representatives, supervisors, senior management).
2.4 Communicate <i>dispute resolution processes</i> where relevant, mediating between line managers and employees	<p>Dispute resolution processes may relate to:</p> <ul style="list-style-type: none"> • awards with specific dispute resolution processes • industrial resolutions • organisational processes.
Foundation Skills	Notes
Numeracy: Selects from, and applies, <i>mathematical</i> and <i>problem solving strategies</i> when reporting on success rates of activities	<p>Mathematical strategies may involve:</p> <ul style="list-style-type: none"> • using charts and graphs to display and interpret data. <p>Problem solving strategies may include:</p> <ul style="list-style-type: none"> • creating diagrams • finding patterns • logical reasoning.
Technology: Uses <i>digital systems and tools</i> to store, access and organise digital information	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • human resource information systems (HRIS) • virtual meeting technology.



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BSBHRM521 Facilitate performance development processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Common <i>methods of monitoring performance</i>	<p>Methods of monitoring performance may involve:</p> <ul style="list-style-type: none"> customer complaints direct observation feedback goal, reality, options, will (GROW) model.
Assessment Conditions	Notes
Relevant <i>legislation, regulations and codes of practice</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination legislation Fair Work legislation, including the Fair Work Act 2009, Fair Work Regulations 2009, Fair Work Commission Rules 2013 local, state and territory work health and safety (WHS) legislation Privacy Act 1988 Small Business Fair Dismissal Code state and territory legislation relating to employment. <p>Regulations may relate to:</p> <ul style="list-style-type: none"> diversity and inclusion industrial awards and agreements. <p>Codes of practice may include:</p> <ul style="list-style-type: none"> non-prescribed voluntary codes organisational codes prescribed mandatory industry codes. <p>Relevant legislation, regulations and codes of practice may vary according to industry.</p>



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BSBHRM522 Manage employee and industrial relations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Consult <i>relevant internal stakeholders</i> and develop IR policies and plans	Relevant internal stakeholders may include: <ul style="list-style-type: none"> human resources managers internal employment law (ELS) specialists senior management.
2.6 Review ER and IR policies and plans and establish whether they are meeting their <i>intended outcomes</i>	Intended outcomes may relate to: <ul style="list-style-type: none"> compliance with national employment standards meeting operational and strategic plans workforce planning requirements.
3.4 Obtain <i>expert or specialist advice</i> and/or refer to precedents, if required	Expert or specialist advice may be sourced from: <ul style="list-style-type: none"> anti-discrimination boards employer associations diversity councils Fair Work ombudsman industry associations (e.g. Australian Human Resources Institute [AHRI]) workplace relations specialists.
Foundation Skills	Notes
Reading: Interprets, critically analyses and applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> awards cases from Fair Work commission enterprise agreements industrial relations cases operational and strategic plans relevant legislation and regulations.
Problem solving: Uses <i>analytical techniques</i> to identify issues and generate possible solutions, seeking input from others, as required, before making decisions or implementing solutions	Analytical techniques may include: <ul style="list-style-type: none"> critical thinking techniques investigative techniques.



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BSBHRM522 Manage employee and industrial relations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
Relevant <i>legislation, regulations, standards and codes of practice</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • Fair Work Act 2009, • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988 • Small Business Fair Dismissal Code • state and territory legislation relating to employment. <p>Regulations and standards may relate to:</p> <ul style="list-style-type: none"> • awards and agreements • diversity and inclusion • Fair Work Commission Rules 2013 • Fair Work Regulations 2009. <p>Codes of practice may include:</p> <ul style="list-style-type: none"> • non-prescribed voluntary codes • organisational codes • prescribed mandatory industry codes. <p>Relevant legislation, regulations, standards and codes of practice may vary according to industry.</p>



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BSBHRM523 Coordinate the learning and development of teams and individuals**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify potential <i>formal and informal learning opportunities</i>	Formal and informal learning opportunities may include: <ul style="list-style-type: none"> coaching and mentoring conferences shadowing training courses.
1.4 Review <i>relevant organisational procedures</i> and ensure they support individual and team access to learning opportunities, where required	Relevant organisational procedures may include: <ul style="list-style-type: none"> learning development procedures standard operating procedures.
Foundation Skills	Notes
Reading: Interprets <i>textual information</i> obtained from a range of sources and determines how content may be applied to individuals and to organisational requirements	Textual information may include: <ul style="list-style-type: none"> tender documents supplied by outsourced companies training plans.
Technology: Uses <i>digital tools</i> to organise, store, integrate and share relevant information	Digital tools may include: <ul style="list-style-type: none"> cloud-based tools learning management systems online learning platforms virtual meeting technology.



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BSBHRM524 Coordinate workforce plan implementation**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review current <i>data</i> on staff turnover and demographics	Data may include <ul style="list-style-type: none"> external data (e.g. Australian Bureau of Statistics [ABS] data, employer organisation reports) internal data (e.g. aggregate data, demographics of workforce, exit interview information).
2.1 Consult <i>relevant stakeholders</i> on organisational strategy and establish aligned objectives for modification or retention of the workforce	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. unions, industry associations) internal stakeholders (e.g. colleagues, employee relations representatives, supervisors, senior management).
Foundation Skills	Notes
Numeracy: Extracts and applies <i>mathematical information</i> and problem-solving strategies when monitoring labour trends and surveying organisational climate	Mathematical information may include: <ul style="list-style-type: none"> demographic analysis turnover calculations.
Technology: Uses a range of <i>digital tools</i> to collect data, and to extract, organise and share information	Digital tools may include: <ul style="list-style-type: none"> cloud-based tools data visualisation software spreadsheets (e.g. Excel, Google Sheets) virtual meeting technology.
Performance Evidence	Notes
Review <i>relevant trends and supply and demand factors</i> that will impact on organisation's workforce	Relevant trends and supply and demand factors may include: <ul style="list-style-type: none"> economic factors education trends geographic factors industry impacts legislative changes market competition political environment impacts seasonal impacts social factors technological factors.
Knowledge Evidence	Notes
<i>Labour force analysis and forecasting techniques</i>	Labour force analysis techniques may include: <ul style="list-style-type: none"> regression analysis. Forecasting techniques may include: <ul style="list-style-type: none"> Delphi method.



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BSBHRM525 Manage recruitment and onboarding

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Obtain support for policies and procedures from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. trainers, unions) internal stakeholders (e.g. colleagues, employee relations representatives, supervisors, senior management, recruitment managers, training managers).
2.1 <i>Determine future human resource requirements</i> in collaboration with relevant stakeholders	<p>Determining future human resource requirements may relate to:</p> <ul style="list-style-type: none"> economic environment operational plans skills shortages workforce analysis.
2.4 Consult and use <i>specialists</i> , where required	<p>Specialists may include:</p> <ul style="list-style-type: none"> medical specialists testing specialists (e.g. psychometric testing, skills testing, values testing).
2.5 Ensure selection procedures are according to <i>legislation and organisational policies and procedures</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination legislation Fair Work Act 2009, local, state and territory work health and safety (WHS) legislation Privacy Act 1988 state and territory legislation relating to employment and recruitment. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> diversity and inclusion industrial awards and agreements. <p>Relevant legislation and organisational policies and procedures may vary according to industry.</p>
Foundation Skills	Notes
Reading: Critically evaluates and applies content from a range of <i>complex texts</i> to determine legislative and business requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> position descriptions relevant legislation.



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BSBHRM526 Manage payroll

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Ensure the <i>confidentiality and security of payroll information</i>	<p>Confidentiality and security of payroll information may include:</p> <ul style="list-style-type: none"> • access restrictions • accuracy of information • back-up processes • following relevant codes of conduct • storage facilities.
1.3 Safeguard organisation's financial resources according to <i>legislative and organisational requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • Freedom of Information Act 1982 • local, state and territory work health and safety (WHS) legislation • payroll legislation obligations (e.g. long service leave acts, Fair Work Act 2009, Fair Work Regulations 2009, Fair Work Commission Rules 2013) • Privacy Act 1988 • taxation legislation. <p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • Australian Tax Office (ATO) requirements • diversity and inclusion • enterprise agreements and modern awards • individual employment contracts • industrial awards and agreements • superannuation • workers' compensation. <p>Relevant legislative and organisational requirements may vary according to industry.</p>
Foundation Skills	Notes
Writing: Records <i>data</i> accurately using relevant format, style and language suited to context and audience	<p>Data may include:</p> <ul style="list-style-type: none"> • demographic and personal data (e.g. name, address, date of birth, superannuation account numbers) • leave data • pay rates • timesheet data.



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BSBHRM526 Manage payroll

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key methods of calculating gross pay and annual salary using nominal awards, contracts and government legislation</i>	Methods of calculating gross pay and annual salary may include: <ul style="list-style-type: none"> Fair Work calculations percentage and time calculations.
<i>Processes associated with Single Touch Payroll (STP)</i>	Processes associated with Single Touch Payroll (STP) may include: <ul style="list-style-type: none"> Australian Tax Office (ATO) reports business activity statements superannuation information.



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BSBHRM527 Coordinate human resource functions and processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	N/A
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
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1.2 *Review external business environment* and likely impact on organisation's human resource requirements

Reviewing external business environments may relate to the following environments:

- competitive
- demographic
- economic
- global
- legal
- political
- social
- technological.

1.3 Consult *relevant stakeholders* to identify relevant human resource requirements

Relevant stakeholders may include:

- external stakeholders (e.g. trainers, unions)
- internal stakeholders (e.g. colleagues, employee relations representatives, supervisors, senior management, recruitment managers, training managers).

Foundation Skills	Notes
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Reading: Critically evaluates and applies content from a range of *structurally complex texts*

Structurally complex texts may include:

- legislation
- organisational and industry codes of conduct
- organisational policies and procedures
- position descriptions.

Knowledge Evidence	Notes
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Relevant *legislative requirements* and *organisational policies and procedures*

Legislative requirements may relate to:

- [anti-discrimination legislation](#)
- [Fair Work Act 2009](#)
- local, state and territory [work health and safety \(WHS\) legislation](#)
- [Privacy Act 1988](#)
- state and territory legislation relating to employment.

Organisational policies and procedures may relate to:

- diversity and inclusion
- industrial awards and agreements.

Relevant legislative requirements and organisational policies and procedures may vary according to industry.



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BSBHRM528 Coordinate remuneration and employee benefits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40420 Certificate IV in Human Resource Management BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00111 Human Resources Advisor Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify the scope of remuneration and benefits plans in consultation with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • employee relations representatives • finance and accounting teams • recruitment managers • senior management • supervisors.
Foundation Skills	Notes
Writing: Develops <i>complex material</i> for specific audiences using clear language and appropriate structure to convey explicit information, requirements and recommendations	<p>Complex material may include:</p> <ul style="list-style-type: none"> • bonus structures • organisational policies and procedures • remuneration packaging.
Knowledge Evidence	Notes
<i>Ways to position an organisation to be an 'employer of choice'</i>	<p>Ways of positioning an organisation to be an 'employer of choice' may relate to:</p> <ul style="list-style-type: none"> • flexible and inclusive ways of working • organisational culture • organisational vision, mission and values • pay structures • training and development opportunities.



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BSBHRM529 Coordinate separation and termination processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40420 Certificate IV in Human Resource Management BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult <i>relevant stakeholders</i> prior to introduction of new policies, procedures and supporting documentation	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. industry associations, relevant commission bodies, unions, Fair Work Ombudsman representatives) internal stakeholders (e.g. employee relations representatives, executive boards, owners, senior management, team leaders, department leaders).
2.4 Ensure dismissals for incapacity to perform or misconduct comply with <i>legislative requirements and organisational policies and procedures</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> anti-discrimination legislation Fair Work Act 2009 state and federal industrial relations and unlawful dismissal legislation. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> disciplinary procedures employment contracts procedures for dismissal, suspension, voluntary termination, retirement and redundancy. <p>Relevant legislative requirements and organisational policies and procedures may vary according to industry.</p>
Foundation Skills	Notes
Learning: Ensures staff have <i>necessary skills and training to oversee employee terminations</i>	<p>Necessary skills and training to oversee employee terminations may include:</p> <ul style="list-style-type: none"> emotional intelligence interpersonal skills negotiation skills.
Knowledge Evidence	Notes
<i>Methods of obtaining feedback</i> and suggesting improvements to organisational operations	<p>Methods of obtaining feedback may include:</p> <ul style="list-style-type: none"> interviews surveys.



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BSBHRM530 Coordinate rehabilitation and return to work programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50320 Diploma of Human Resource Management BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Ensure that the organisation has and maintains a current Workers' Compensation insurance policy according to <i>required legislation</i>	Required legislation may include: <ul style="list-style-type: none"> state-based legislation for workers compensation requirements.
2.3 Design a <i>return to work program</i>	Return to work programs may be: <ul style="list-style-type: none"> designed in consultation with relevant external stakeholders (e.g. medical and healthcare professionals).
Foundation Skills	Notes
Reading: Evaluates and integrates facts and ideas to construct meaning from a range of <i>text types</i>	Text types may include: <ul style="list-style-type: none"> legislation medical reports organisational policies and procedures.



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BSBHRM531 Coordinate health and wellness programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40420 Certificate IV in Human Resource Management BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and collect information on employee health issues from <i>relevant sources</i>	Relevant sources may include: <ul style="list-style-type: none"> industry health issue reports (e.g. legal industry burnout) medical records workers' compensation claims.
1.3 Consult <i>relevant stakeholders</i> and develop options for addressing identified health issues	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. medical, healthcare and allied health professionals, such as occupational therapists) internal stakeholders (e.g. senior management, colleagues, team leaders).
Performance Evidence	Notes
Prepare <i>policy documents</i>	Policy documents may include: <ul style="list-style-type: none"> health and wellbeing policies work health and safety policies.
Knowledge Evidence	Notes
<i>Methods for monitoring and evaluating program progress and impact</i>	Methods for monitoring and evaluating program progress and impact may relate to: <ul style="list-style-type: none"> audit approach number of workers' compensation claims rates of absenteeism return on investment (ROI) approach.



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BSBHRM611 Contribute to organisational performance development**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management	BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Develop organisational performance development program plan with appropriate outcomes, in consultation with <i>key stakeholders</i>	Key stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. Fair Work specialists, industry bodies) internal stakeholders (e.g. colleagues, human resource officers, senior management, team leaders, work health and safety [WHS] officers).
2.1 Develop range of <i>tools and resources</i> according to organisational performance development program modes and methods	Tools and resources may include: <ul style="list-style-type: none"> codes of conduct codes of practice key performance indicators (KPIs) learning and development plans performance plans performance standards self-rating systems standard operating procedures surveys and forms.
3.3 Use <i>data</i> and reporting tools and monitor organisational performance development	Data may relate to: <ul style="list-style-type: none"> grievances KPIs leave performance appraisals productivity profitability.

Foundation Skills	Notes
Reading: Interprets <i>textual information</i> obtained from a range of sources and determines how content may be used to meet requirements	Textual information may include: <ul style="list-style-type: none"> awards and agreements legislation national employment standards policies and procedures position descriptions.
Technology: Uses <i>digital tools</i> to store, access and organise information about the mentoring program	Digital tools may include: <ul style="list-style-type: none"> cloud-based storage and server systems human resource information system (HRIS) management systems mentoring platforms.



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BSBHRM611 Contribute to organisational performance development**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management	BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Organisational performance development <i>program design principles</i>	<p>Program design principles may relate to:</p> <ul style="list-style-type: none"> accessibility equity.
Legislation and organisational policies relevant to organisational performance development, including confidentiality and privacy requirements	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination legislation Fair Work Act 2009 local, state and territory WHS legislation Privacy Act 1988 state and territory legislation relating to employment. <p>Organisational policies may relate to:</p> <ul style="list-style-type: none"> codes of conduct codes of practice separation and termination WHS. <p>Relevant legislation and organisational policies may vary according to industry.</p>



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BSBHRM612 Contribute to the development of employee and industrial relations strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Contribute to development strategies and policies in consultation with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. legal representatives, industry bodies, unions) internal stakeholders (e.g. employees, senior management).
2.1 Negotiate awards, agreements, and contracts according to organisational objectives and <i>employee rights and obligations</i>	<p>Employee rights and obligations may relate to:</p> <ul style="list-style-type: none"> anti-discrimination legislation Fair Work Act 2009 national employment standards Privacy Act 1988 relevant enterprise agreements Safework Australia guidance.
3.2 Communicate problem solving processes and obtain support from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> employees employee representatives management mediators.
3.4 Obtain <i>specialist advice</i> , where required	<p>Specialist advice may be sourced from:</p> <ul style="list-style-type: none"> employment lawyers Fair Work Ombudsman industry representatives union representatives.
4.1 Develop plans for the promotion of diversity within the organisation in consultation with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> diversity councils employees senior management.



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BSBHRM613 Contribute to the development of learning and development strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80120 Graduate Diploma of Management (Learning)	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Analyse and plan <i>technological and systems requirements for an organisational learning strategy</i>	<p>Technology and systems may include:</p> <ul style="list-style-type: none"> learning management systems (e.g. online learning platforms, face-to-face workshops) multimedia authoring tools. <p>Requirements for an organisational learning strategy may relate to:</p> <ul style="list-style-type: none"> accessibility industry learning and e-learning standards numbers of users, including concurrent system users storage systems, including learning content management systems and learning object repositories work health and safety [WHS].
2.1 Design, collaboratively with <i>relevant stakeholders</i> , organisational learning and development strategy	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. trainers, industry bodies, industry associations, regulators) internal stakeholders (e.g. colleagues, team leaders, heads of departments, senior management).
Foundation Skills	Notes
Reading: Interprets, analyses and evaluates a range of <i>textual information</i> to assist in determining and developing strategies and to manage organisational requirements	<p>Textual information may include:</p> <ul style="list-style-type: none"> legislation organisational policies and procedures standard operating procedures strategic plans training plans workforce plans.
Performance Evidence	Notes
<i>Source learning resources or assessment tools</i> , and modify, if required, to meet requirements of organisational learning strategies	<p>Sourcing learning resources or assessment tools may relate to:</p> <ul style="list-style-type: none"> industry benchmarks key performance indicators (KPIs) performance standards.



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BSBHRM614 Contribute to strategic workforce planning**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify <i>new technology</i> and its impact on job roles and job design	New technology may include: <ul style="list-style-type: none"> artificial intelligence (AI) cloud-based software virtual collaboration and meeting technology.
2.1 Consult <i>relevant managers</i> about their workforce preferences	Relevant managers may include: <ul style="list-style-type: none"> directors senior management team leaders.
3.1 Work with <i>relevant stakeholders</i> and ensure that plan is implemented according to organisational objectives	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. legal representatives, industry bodies, unions) internal stakeholders (e.g. directors, employees, senior management).
Foundation Skills	Notes
Reading: Organises, evaluates and applies content from a range of <i>structurally complex texts</i> relating to human resource strategic planning	Structurally complex texts may include: <ul style="list-style-type: none"> Australian Bureau of Statistics (ABS) data awards and agreements statistical data strategic plans workforce trends.
Knowledge Evidence	Notes
Relevant <i>legislative, regulatory and industrial requirements</i> for the organisation	Legislative requirements may relate to: <ul style="list-style-type: none"> anti-discrimination legislation Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation. Privacy Act 1988. Regulatory and industrial requirements may relate to: <ul style="list-style-type: none"> WHS regulations. <p>Relevant legislative, regulatory and industrial requirements may vary according to industry.</p>
<i>Options for sourcing labour supply</i>	Options for sourcing labour supply may include: <ul style="list-style-type: none"> contract labour employment agencies.



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BSBHRM615 Contribute to the development of diversity and inclusion strategies**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	BSBSS00117 Diversity and Inclusion Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify and assess <i>factors that affect current and future supply of workers</i>	<p>Factors affecting current and future supply of workers may include:</p> <ul style="list-style-type: none"> • economic conditions • education trends • geographic factors • immigration policies and trends • political environment.
Foundation Skills	Notes
Reading: Sources, evaluates and critiques ideas and information from a range of <i>complex texts</i> to assist with decisions, change management, and management of organisational requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation (state and federal) • Age Discrimination Act • Australian Human Rights Commission Act • Disability Discrimination Act • Disability Standards for Education • Disability (Access to Premises – Buildings) Standards • Fair Work Act • Racial Discrimination Act • Sex Discrimination Act • Sex Discrimination Amendment (Sexual Orientation, Gender Identity and Intersex Status) Act 2013 • Workplace Gender Equality Act.
Knowledge Evidence	Notes
Common <i>planning methodologies</i>	<p>Planning methodologies may include:</p> <ul style="list-style-type: none"> • collaborative planning • consultative planning • ensuring compliance checks are integrated into planning.
<i>Workforce trends</i> affecting workforce planning methodologies	<p>Workforce trends may relate to:</p> <ul style="list-style-type: none"> • government policies • workforce casualisation.



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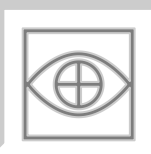
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Information Services Unit Sector Overview

The Information Services (INS) unit sector incorporates specialist units of competency aimed at supporting and managing library and information services functions in organisations. It also contains specialist units of competency aimed at supporting the archiving and records management functions of an organisation.

Relevant job roles may include library technician and research assistant, and records manager.



Glossary of common terminology

LMS	Library management system.
ILMS	Integrated library management systems.
Metadata	A set of data that describes and gives information about other data.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
RFID	Radio-frequency identification.

Information Services Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Information Services' unit stream, please refer to the interpretation guidance provided on pages 187 - 239. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBINS201 Process and maintain workplace information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Collect <i>physical and digital information items</i>	Physical and digital information items may include: <ul style="list-style-type: none"> all resources for clients (e.g. books, CDs, databases, DVDs, eBooks, newspapers and magazines).
1.4 Apply <i>organisational policies and procedures</i> relating to security and confidentiality in handling information	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> access communication protocols and channels file naming conventions privacy guidelines security and archiving procedures storage.
2.1 Enter <i>metadata</i> applying to information items into relevant system according to organisational policies and procedures	Metadata in library environments may include: <ul style="list-style-type: none"> cataloguing data creator information physical descriptions publisher distribution publishing date title.
Foundation Skills	Notes
Technology: Uses <i>digital technologies</i> regarding data entry and retrieval	Digital technologies may include: <ul style="list-style-type: none"> databases or locally created databases digital and cloud technology library management system (LMS).
Assessment Conditions	Notes
Examples of <i>workplace information systems</i>	Workplace information systems may include: <ul style="list-style-type: none"> data and information management system within an organisation LMS.



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BSBINS202 Handle receipt and dispatch of information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Enter <i>metadata</i> applying to information items into relevant system according to organisational policies and procedures, where required	Metadata relates to: <ul style="list-style-type: none"> author date created date modified file size.
1.6 Sort and deliver information items to <i>relevant stakeholders</i> according to organisational policies and procedures	Relevant stakeholders may include: <ul style="list-style-type: none"> colleagues employees managers supervisors teachers team leaders.
1.7 Record damaged, suspicious or missing items and report to <i>relevant stakeholders</i> , where required	Relevant stakeholders may include: <ul style="list-style-type: none"> manager supervisor team leader.
Foundation Skills	Notes
Reading: Identifies familiar information from a range of <i>sources</i> , compares it against defined criteria and requirements, and checks for accuracy and completeness	Sources may include: <ul style="list-style-type: none"> almanacs archives and museums articles in databases digital databases encyclopedias manuals online searches physical and online dictionaries reference books websites.
Technology: Uses <i>digital tools</i> for basic reading, recording, searching and communicating information following routine procedures	Digital tools may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management online platforms search engines word processing tools.
Knowledge Evidence	Notes
Roles and locations of <i>relevant organisational personnel</i>	Relevant organisational personnel may include those listed under 'relevant stakeholders' above.



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BSBINS203 Assist with circulation services

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assist <i>relevant stakeholders</i> with basic enquiries	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> customers who may be borrowing resources library patrons library partners peak bodies (e.g. council or school libraries).
1.4 Respond to customer enquiries or refer to <i>relevant stakeholder</i>	<p>Relevant stakeholders to refer customer enquiries to may include:</p> <ul style="list-style-type: none"> circulation supervisor teacher or librarian in a school team leader.
3.1 Identify <i>irregularities in transactions</i>	<p>Irregularities in transactions may include, irregularities in loan systems such as:</p> <ul style="list-style-type: none"> clients who claim to have returned something that is still shown as being lent to them in the system disputed overdue fees items that should be in catalogue but are not able to be found missing items unregistered items in database.
Foundation Skills	Notes
Technology: Uses <i>digital technology</i> for basic reading, recording and searching information, and for communications following routine procedures	<p>Digital technology may relate to:</p> <ul style="list-style-type: none"> access to intranet and organisation homepage databases or locally created databases digital and cloud technology library management system (LMS).
Performance Evidence	Notes
Create and <i>modify patron records</i> according to organisational procedures	<p>Modifying patron records may include:</p> <ul style="list-style-type: none"> changing phone number, address or name registering borrower on LMS.
Knowledge Evidence	Notes
<i>Customer service systems</i> , policies and procedures	<p>Customer service systems may be:</p> <ul style="list-style-type: none"> a module in the LMS.



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BSBINS203 Assist with circulation services**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Current industry systems and equipment</i> for processing loan and return transactions	Current industry systems and equipment may include: <ul style="list-style-type: none"> • access to intranet and organisation homepage • databases or locally created databases • digital and cloud technology • LMS.
<i>Special purpose tools</i> , equipment, materials and relevant industry software packages	Special purpose tools may include hardware, such as: <ul style="list-style-type: none"> • readers • radio-frequency identification (RFID) machines • scanners • self service machines.



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BSBINS301 Develop and use information literacy skills

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30420 Certificate III in Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify range of <i>sources of information</i>	<p>Sources of information may include:</p> <ul style="list-style-type: none"> • almanacs • archives and museums • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
1.4 Use <i>basic search strategies</i> to locate relevant information	<p>Basic search strategies may include:</p> <ul style="list-style-type: none"> • basic and advanced search functions within databases and online • catalogue searches • use of boolean search criteria.
3.2 Present information in a <i>format</i> that meets the purpose	<p>Format may be found in:</p> <ul style="list-style-type: none"> • organisational templates • style guides (e.g. APA, Chicago). <p>Format may include:</p> <ul style="list-style-type: none"> • bibliographical records of items • citations • pamphlets.
4.1 Evaluate own information literacy skills based on feedback from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • customers • employers • mentors • supervisors • teachers • team leaders.

Foundation Skills	Notes
Technology: Uses <i>digital technology</i> for basic reading, recording and searching information, and for communications following routine procedures	<p>Digital technology may include:</p> <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS301 Develop and use information literacy skills

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30420 Certificate III in Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Techniques and procedures for accessing different information sources, including <i>current technology</i>	<p>Current technology may include:</p> <ul style="list-style-type: none"> • citation tools. • cloud and digital platforms • communication systems (e.g. emails) • customer relationship management systems (CRM) • library management systems (LMS) • online platforms • online catalogues and search engines.
<i>Common methods</i> for organisation of resources	<p>Common methods may include:</p> <ul style="list-style-type: none"> • accessibility • archiving • file structure • storage security. <p>In library environments common methods may include:</p> <ul style="list-style-type: none"> • classification systems (e.g. Dewey Decimal) • organisation of material on shelves <p>Methods may vary depending on size and type of organisation</p>
Assessment Conditions	Notes
<i>Special purpose tools</i> , equipment, <i>materials</i> , systems and industry software packages	<p>Special purpose tools may include:</p> <ul style="list-style-type: none"> • catalogues • databases • organisational information and systems (e.g. policies and procedures). <p>Materials may include:</p> <ul style="list-style-type: none"> • guides for presenting different types of information.



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BSBINS302 Organise workplace information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Access additional required information from <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • employees • managers • supervisors • teachers • team leaders.
2.2 Store information using <i>relevant systems</i> and technology according to organisational policies and procedures	Relevant systems may include: <ul style="list-style-type: none"> • database systems • document-retrieval systems • reference-retrieval systems.
Foundation Skills	Notes
Reading: Recognises and assesses <i>textual information</i> to complete tasks according to requirements	Textual information may include: <ul style="list-style-type: none"> • almanacs • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Technology: Uses <i>digital technology</i> to access and record information and to communicate with others	Digital technology may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
<i>Methods for checking</i> information is clear, accurate, current and relevant for purpose	Methods for checking may include: <ul style="list-style-type: none"> • proofreading • reviewing



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BSBINS303 Use knowledge management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Access knowledge management system according to legislative, regulatory and organisational policies and procedures	<p>Legislation relevant to knowledge management system access may include:</p> <ul style="list-style-type: none"> • Privacy Act 1988 • state, territory and Commonwealth work health and safety (WHS) laws
2.4 Analyse requirements of the system and make suggestions for improvements to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • employees • manager • supervisors • teachers • team leader.
Foundation Skills	Notes
Reading: Comprehends <i>textual information</i> , incorporating ideas and concepts from a range of sources, and checks for accuracy and relevance	<p>Textual information may include:</p> <ul style="list-style-type: none"> • almanacs • articles within databases • atlases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Technology: Uses basic functions of <i>digital technology</i> tools to read, record, search and input required information	<p>Digital technology may include:</p> <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Assessment Conditions	Notes
<i>Knowledge management system</i> (which can be a simulated system to satisfy privacy and confidentiality provisions).	<p>Knowledge management system may include:</p> <ul style="list-style-type: none"> • artificial intelligence tools • content management systems • data warehousing and data mining • decision support systems • semantic networks • simulation tools.



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BSBINS304 Process and maintain information resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Check outsourced shelf-ready items for processing according to organisational procedures	<p>Checking outsourced shelf-ready items for processing may include:</p> <ul style="list-style-type: none"> checking details on catalogue or database checking spine label and confirming it matches supplied catalogue record ensuring barcodes are used.
1.4 Identify issues with processing systems and procedures and report to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> customers employers mentors supervisors teachers team leaders.
2.3 Identify and follow <i>safety procedures</i> when handling resources	<p>Safety procedures may include:</p> <ul style="list-style-type: none"> electrical and automation awareness manual handling, including safe lifting and carrying repetitive use secure and sustainable practices use of shelves use of ladders use of library trolleys.
Foundation Skills	Notes
Problem solving: Makes <i>low-impact decisions</i> within familiar situations, based on a range of pre-defined or routine solutions	<p>Low-impact decisions may include:</p> <ul style="list-style-type: none"> how to operate within roles and responsibilities interpreting guidelines and correcting material organising shelving according to guidelines.
Knowledge Evidence	Notes
<i>Protective and security devices</i> for materials in different formats	<p>Protective and security devices may include:</p> <ul style="list-style-type: none"> security on books, CDs and DVDs red sticker alert systems radio-frequency identification (RFID) or smart labels.
<i>Types of damage and deterioration</i> for information, and different <i>protection and storage</i> options.	<p>Types of damage and deterioration may include:</p> <ul style="list-style-type: none"> aging scratches torn resources unclean resources water damage. <p>Protection and storage options may include:</p> <ul style="list-style-type: none"> archiving repairing replacing spine labels.



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BSBINS304 Process and maintain information resources**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Industry-current equipment and classification systems</i>	Industry-current equipment may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
<i>Special purpose tools, equipment and materials relevant to performance evidence</i>	Special purpose tools, equipment and materials may include: <ul style="list-style-type: none"> • carts • covering materials and tools • door security systems • guillotines • scissors • trolleys.



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BSBINS305 Participate in cataloguing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access <i>sources of cataloguing rules and tools</i> relevant to organisation	Sources of cataloguing rules and tools may include: <ul style="list-style-type: none"> online sources resource description and access (RDA) cataloguing rule.
1.2 Identify <i>basic components</i> and structure of <i>bibliographic records</i>	Basic components of bibliographic records may include: <ul style="list-style-type: none"> author date ISBN label format publisher subject title.
1.3 Identify relevance of different <i>cataloguing tools</i> to various areas of work	Cataloguing tools may include: <ul style="list-style-type: none"> Dewey Decimal Classification resource description and access (RDA) cataloguing rule subject headings.
3.2 Consult with <i>relevant colleagues</i> regarding accuracy of bibliographic records and refer issues to relevant stakeholders	Relevant colleagues may include: <ul style="list-style-type: none"> employers mentors supervisors teachers team leaders.
Foundation Skills	Notes
Technology: Uses familiar <i>digital technologies</i> and systems to access information, search and enter data, and communicate with others	Digital technologies may include: <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management systems (CRM) library management systems (LMS) online catalogues and search engines online platforms word processing tools.
Knowledge Evidence	Notes
<i>Cataloguing standards</i> and organisational policies and procedures	Cataloguing standards may include: <ul style="list-style-type: none"> online internet sources resource description and access (RDA) cataloguing rule.



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BSBINS306 Provide multimedia support

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Select <i>required multimedia equipment</i> and programs for a given purpose	Required multimedia equipment may include: <ul style="list-style-type: none"> • 3D printers • CD and DVD players • computers • digital printing equipment • photocopiers • presentation equipment (e.g. PowerPoint, Google Slides) • printing scanners • screens (e.g. television, smart board).
1.4 Assist <i>relevant stakeholders</i> to use multimedia equipment and programs safely and according to organisational procedures	Relevant stakeholder may include: <ul style="list-style-type: none"> • colleagues • library patrons • new colleagues.
2.3 Identify situations where <i>specialist assistance</i> is required and take required action	Specialist assistance may be required for: <ul style="list-style-type: none"> • disability support • equipment and materials contracts • online printing • printing and photocopying.
3.1 Source information from <i>relevant stakeholders</i> on problems with use of current multimedia equipment and programs	Relevant stakeholder may include: <ul style="list-style-type: none"> • customers • employers • mentor • supervisors • teachers • team leader.



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BSBINS306 Provide multimedia support

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Sources and interprets <i>textual information</i> to identify most efficient and productive approach to the job	Textual information may include: <ul style="list-style-type: none"> • instruction guides • manuals.
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
<i>Common multimedia options</i> relevant to the work context at a generalist level	Common multimedia options may include those listed under 'required multimedia equipment' above.
<i>Common faults</i> and ways of rectifying these in multimedia equipment and programs used	Common faults may include: <ul style="list-style-type: none"> • cables not connected • insufficient supplies • format incompatibility • paper jams • network faults • streaming faults.



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BSBINS307 Retrieve information from records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Confirm <i>access category</i> of person, in accordance with organisational procedures	Access category may relate to: <ul style="list-style-type: none"> privacy requirements.
Foundation Skills	Notes
Reading: Identifies, interprets, checks and compares a range of <i>information to inform effective and compliant actions</i>	information to inform effective and compliant actions may include: <ul style="list-style-type: none"> audiovisual and multimedia CDs DVDs graphic imaging systems mainframe microform PC-based applications paper-based remote drives servers.
Technology: Uses main features and functions of <i>digital tools</i> to search and access information and records	Digital tools may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management (CRM) system online platforms search engines word processing tools.
Performance Evidence	Notes
Work with <i>relevant stakeholders</i> to identify information requirements and retrieve relevant information on at least three occasions.	Relevant stakeholders may include: <ul style="list-style-type: none"> colleagues customers employees supervisors teachers team leaders.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to records and records information	Workplace documentation may relate to: <ul style="list-style-type: none"> specific records that have been retrieved and used to provide information including: <ul style="list-style-type: none"> details of request for information receiver documentation.



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BSBINS308 Control records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Categorise incoming information into <i>published</i> and unpublished information and identify records, metadata and formats for capture	Published information may include: <ul style="list-style-type: none"> books CD-ROMS online or hard copy forms and leaflets posters videos web publications.
1.2 Identify information, format and <i>metadata</i> that requires capture	Metadata in library environments may include: <ul style="list-style-type: none"> cataloguing data creator information physical descriptions publisher distribution publishing date title.
3.3 Document and distribute records to <i>relevant locations</i> or stakeholders according to special handling requirements of the record format	Relevant locations may include: <ul style="list-style-type: none"> databases filing storage.
Foundation Skills	Notes
Reading: Interprets information from a range of <i>texts</i> to <i>determine organisational requirements</i>	Texts used to determine organisational requirements may include: <ul style="list-style-type: none"> emails frequently asked questions (FAQs) flow charts instruction guides organisational policies, procedures and codes of conduct procedure manuals.
Technology: Uses main features and functions of <i>digital tools</i> to control records	Digital tools may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management (CRM) systems databases online platforms search engines word processing tools.
Knowledge Evidence	Notes
<i>Common categories of information</i>	Common categories of information may include: <ul style="list-style-type: none"> text video voice.



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BSBINS309 Maintain business records**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.3 Distribute reports to <i>relevant stakeholders</i> according to organisational policies and procedures	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • employees • supervisors • teachers • team leaders.
Foundation Skills	Notes
Reading: Gathers and interprets <i>textual information</i> from different sources to determine how information and records may be applied	Textual information may include: <ul style="list-style-type: none"> • almanacs • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Numeracy: Recognises and uses <i>numerical systems</i> associated with business or record systems	Numerical systems may include: <ul style="list-style-type: none"> • file sequencing • file sizes • labelling • megabytes and gigabytes • network speeds (e.g. megabytes per second) • relative sizes (size of thumbnail image compared to a full featured image).
Technology: Uses main features and functions of <i>digital tools</i> to maintain business records	Digital tools may include: <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails) • customer relationship management (CRM) systems • databases • online search engines • online platforms • word processing tools.



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BSBINS309 Maintain business records**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Organisational requirements of business or <i>records system reports</i>	Records system reports may include: <ul style="list-style-type: none"> • debtor reports • employee pay records • financial statements • inventory reports.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to business records	Workplace documentation may relate to: <ul style="list-style-type: none"> • specific records that have been retrieved and used to provide information.



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BSBINS401 Analyse and present research information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40620 Certificate IV in Legal Services BSB40720 Certificate IV in Library and Information Services BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify potential <i>sources for research information</i> relevant to organisation requirements	Sources for research information may include: <ul style="list-style-type: none"> • almanacs • archives and museums • articles within databases • atlases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
4.1 Identify <i>methods of reporting</i> that align with the intended audience and relevant organisational requirements	Methods of reporting may include: <ul style="list-style-type: none"> • periodical written reports • team meetings • verbal updates.
Foundation Skills	Notes
Technology: Uses the main features and functions of <i>digital technologies</i> and tools to research and analyse information	Digital technologies may include: <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management (CRM) systems • databases • online search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
<i>Common research strategies</i>	Common research strategies may include: <ul style="list-style-type: none"> • checking research provided by others • checking written material, including referrals and client files • individual research • information from other organisations • interviews with community members, colleagues and customers • observation and listening • previous file records • questioning (in person or indirect) • recruitment applications and other forms.



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BSBINS402 Coordinate workplace information systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify information required by <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • customers • employees • management • supervisors.
2.2 Confirm information is in a <i>format suitable</i> for analysis, interpretation and distribution	Suitable format for analysis may relate to: <ul style="list-style-type: none"> • file format (e.g. .xls, .doc, and .ppt) • structure of information.
3.3 Recommend improvements to information system to <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • management • supervisors • team leaders.
4.1 Collect <i>data about information system future needs</i> in consultation with relevant stakeholders	Data data about information system future needs may include: <ul style="list-style-type: none"> • archived, filed and historical background data • continuous improvement and quality assurance data • data available internally or externally • data shared and retrieved in various forms, such as in writing or verbal, electronic or manual forms • financial and contractual data • marketing and customer-related data • organisational performance data • policies and procedures

Foundation Skills	Notes
Reading: Critically analyses documentation from a variety of <i>sources</i> and consolidates information	Sources of documentation may include: <ul style="list-style-type: none"> • almanacs • archives and museums • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.



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BSBINS402 Coordinate workplace information systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital technologies</i> and systems to access, enter, present and distribute information	Digital technologies may include: <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management (CRM) systems • databases • online search engines • online platforms • word processing tools.



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BSBINS403 Obtain information from external and networked sources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40720 Certificate IV in Library and Information Services BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine and confirm exact nature of information needs with <i>relevant stakeholder</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> customers employers mentors supervisors teachers team leaders.
1.4 Recommend <i>alternative options</i> to fulfil relevant stakeholder information needs, where required	Alternative options may include: <ul style="list-style-type: none"> acquiring existing resources digital copies free resources hard copies interlibrary loans paid resources purchasing resources.
3.4 <i>Seek assistance</i> to source information that is difficult to locate	Seeking assistance may include from: <ul style="list-style-type: none"> knowledge specialists librarians third-party information resource systems (e.g. Libraries Australia, Trove)
4.5 Confirm compliance with <i>copyright legislation</i> in relation to supply of photocopied or electronic documents	Copyright legislation may include: <ul style="list-style-type: none"> Copyright Act 1968.
Foundation Skills	Notes
Reading: Evaluates information resources from a variety of <i>sources</i> to ensure appropriateness to client needs	Sources may include: <ul style="list-style-type: none"> almanacs archives and museums articles within databases digital databases encyclopedias manuals online searches physical and online dictionaries reference books websites.



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BSBINS403 Obtain information from external and networked sources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40720 Certificate IV in Library and Information Services BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses familiar <i>digital technologies and systems</i> to access information, search and enter data, present information and communicate with others	Digital technologies and systems may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management (CRM) systems • library management systems (LMSs) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
<i>Common information services networks</i> that facilitate access to external sources	Common information services networks may include: <ul style="list-style-type: none"> • National Libraries Australia (NLA) • public libraries • state and local libraries • Trove.
<i>Common interlibrary lending policies and standards, and codes</i>	Common interlibrary lending policies and standards, and codes may include: <ul style="list-style-type: none"> • Australian Library and Information Association lending policies • Interlibrary Lending Code • NLA • local policies and procedures.
Assessment Conditions	Notes
<i>Special purpose equipment, materials</i> and industry software packages	Special purpose equipment and materials may include: <ul style="list-style-type: none"> • carts • covering materials and tools • door security systems • guillotines • library catalogues • scissors • trolleys.



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BSBINS404 Search library and information databases

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services	BSB30420 Certificate III in Library and Information Services BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>range of databases</i> available to information services providers	Range of databases may include: <ul style="list-style-type: none"> • Australian legislative and standards databases • commercial databases (e.g. EBSCOhost), • free web-based databases (e.g. PubMed, Education Resources Information Center [ERIC]) • government databases.
3.2 Organise and present information according to <i>stakeholder needs</i>	Stakeholder needs may include: <ul style="list-style-type: none"> • level of detail required • number of items • specific stakeholder requests (e.g. bibliography, citation, link for database).

Foundation Skills	Notes
Reading: Critically analyses information from a variety of <i>sources</i> and consolidates information to determine requirements	Sources may include: <ul style="list-style-type: none"> • almanacs • archives and museums • articles within databases • atlases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Technology: Uses familiar <i>digital technologies</i> and systems to access information, search and enter data, present information, and use databases	Digital technologies may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS405 Use integrated library management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Use <i>basic functions of an ILMS</i> , including interrelation of different modules	Basic functions of an ILMS may include: <ul style="list-style-type: none"> • acquisitions • cataloguing • circulation (including loans and returns, registration of a patron, reserves) • running reports (e.g. overdue reports, holds and reserves) • searches.
2.1 Provide current and accurate information to <i>relevant stakeholders</i> in relation to circulation and lending policies and procedures, including self-service systems	Relevant stakeholder may include: <ul style="list-style-type: none"> • customers • employers • mentors • supervisors • teachers • team leaders.
2.6 Refer complex customer queries and complaints to <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> • librarians • line managers • supervisors.
4.1 <i>Source information</i> about current industry trends and emerging technologies in relation to ILMS	Sourcing information may include: <ul style="list-style-type: none"> • accessing websites (e.g. Australian Library and Information Association [ALIA]) • ILMS functions • industry journals • participating in staff development.
Foundation Skills	Notes
Reading: Interprets information from <i>structured texts, instructions and correspondence</i> from colleagues or customers, and derives relevant information from more complex texts	Structured texts, instructions and correspondence may include: <ul style="list-style-type: none"> • emails • frequently asked questions (FAQs) • flow charts • instruction guides • procedure manuals.
Knowledge Evidence	Notes
<i>Common safe work practices</i> relating to using an ILMS	Common safe work practices may include: <ul style="list-style-type: none"> • ergonomics (e.g. monitor at correct angle, keyboards in correct position).



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BSBINS406 Assist customers to access information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Construct and follow <i>search strategies</i> to locate information using industry-current information	Search strategies may involve: <ul style="list-style-type: none"> • broad search terms • digital browsing • faceted search • key word search • narrow search term • search criteria (e.g. author, title, subject) • use of limiters and expanders.
3.4 Take action to resolve remaining issues or refer customers to <i>other personnel</i> , as required	Other personnel may include: <ul style="list-style-type: none"> • librarians • line managers • supervisors.
Foundation Skills	Notes
Reading: Interprets information from <i>sources</i> to identify relevant and key information	Sources may include: <ul style="list-style-type: none"> • almanacs • archives and museums • articles within databases • atlases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Technology: Uses familiar <i>digital technologies and systems</i> to access information, and assist customers	Digital technologies and systems may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
<i>Typical customer requests</i> and appropriate information sources for responding	Typical customer requests may relate to: <ul style="list-style-type: none"> • items in a specific range (e.g. time frame of release, from certain country, certain language).
Techniques for <i>using reference resources and tools</i> , including formulating search strategies	Using reference resources and tools may relate to: <ul style="list-style-type: none"> • electronic databases • industry-based tools that are a combination of free and commercial tools.



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BSBINS407 Consolidate and maintain library industry knowledge

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services BSB50520 Diploma of Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Use a variety of <i>sources of information</i> to research industry developments and their impact on current work practices	Sources of information may include: <ul style="list-style-type: none"> association websites (e.g. Australian Library and Information Association [ALIA]) industry websites relevant peak bodies.
2.2 Source and monitor <i>information about career opportunities</i> and employment conditions	Information about career opportunities may be from such sites as: <ul style="list-style-type: none"> ALIA employment agencies and websites (e.g. SEEK, LinkedIn, Ignite recruitment agency) relevant government websites union websites.
2.3 Distribute information about key issues and trends, and emerging technologies to <i>relevant stakeholders</i>	Relevant stakeholder may include: <ul style="list-style-type: none"> colleagues customers employers mentors patrons supervisors teachers team leaders.

Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex text</i> to determine legislative, regulatory and business requirements	Complex text may include: <ul style="list-style-type: none"> industry reports job position descriptions legislative and business requirements library awards organisational charts policies and procedures (organisational and industry recommended) relevant library legislation.
Technology: Uses a range of <i>digitally based technologies</i> to access, extract and share relevant information to achieve required outcomes	Digitally based technologies may include: <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management systems (CRM) library management systems (LMS) online catalogues and search engines online platforms word processing tools.



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BSBINS407 Consolidate and maintain library industry knowledge

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services BSB50520 Diploma of Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Recognise <i>legislation and ethical issues</i> relevant to the workplace.	<p>Legislation and ethical issues may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • codes of conduct • Competition and Consumer Act 2010 • Copyright Act 1968 • cultural sensitivity • Privacy Act 1988 • state or territory based Library Acts • state, territory or Commonwealth based work health and safety (WHS) legislation.
Knowledge Evidence	Notes
Underpinning <i>values, principles and philosophies</i> of the library industry	<p>Values, principles and philosophies may include:</p> <ul style="list-style-type: none"> • diversity and inclusion principles • equitable access of information • freedom of information • inclusive practice.
<i>Funding models in the library industry</i>	<p>Funding models in the library industry may include:</p> <ul style="list-style-type: none"> • government funding for schools • industry-funding • public funding from councils • special and private libraries funded by a specific cohort • state government funding. <p>Funding may be dependent on the type of library (e.g. school, public library)</p>



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BSBINS408 Provide information from and about records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify specific information required or search criteria provided by <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • customers • employees • management • supervisors • team leaders.
Foundation Skills	Notes
Reading: Identifies and interprets information from a variety of organisational and <i>regulatory texts</i> to determine required actions	Regulatory texts may relate to: <ul style="list-style-type: none"> • privacy regulations • work health and safety (WHS) regulations.
Technology: Uses <i>digital systems</i> and tools to provide records or information about records to relevant stakeholders	Digital systems may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • online catalogues and search engines • online platforms • word processing tools.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence.	Workplace documentation may relate to: <ul style="list-style-type: none"> • specific records that have been retrieved and used to provide information.



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BSBINS409 Maintain and monitor digital information and records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Prepare a <i>checklist</i> of organisational requirements to assess digital information to be captured	Checklist may include: <ul style="list-style-type: none"> long-term storage media for information and records cost-effective storage media for ephemeral or short-term records remote storage of backup data in case of fire or other incidents.
2.1 Categorise and describe incoming and outgoing records information in terms of key activities and <i>responsible stakeholder</i>	Responsible stakeholders may include: <ul style="list-style-type: none"> management senior management supervisors team leaders.
Foundation Skills	Notes
Reading: Identifies, interprets, analyses and reviews information from a <i>range of texts</i>	Range of texts may include: <ul style="list-style-type: none"> emails frequently asked questions (FAQs) flow charts instruction guides procedure manuals.
Technology: Uses <i>digital systems</i> and tools to access, organise, analyse and display records, showing awareness of the need for data security	Digital systems may include: <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management systems (CRM) online catalogues and search engines online platforms word processing tools.
Knowledge Evidence	Notes
<i>Risk management requirements</i> for classifying and storing networked information	Risk management requirements may relate to: <ul style="list-style-type: none"> backup and recovery procedures policies and procedures for checking the accuracy and currency of data remote storage for backup data secondary storage requirements
Assessment Conditions	Notes
<i>Storage methods and storage media</i>	Storage may relate to: <ul style="list-style-type: none"> migration of records from one medium to another (e.g. physical copy to digital copy) online and offline on-site and off-site outsourced storage.



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BSBINS410 Implement records systems for small business

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult with <i>relevant stakeholders</i> and identify and document core business functions, supporting activities, resources, and business and social contexts	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • employees • management • supervisors • team leaders.
2.1 Identify <i>metadata</i> needed to describe, store, locate and retrieve records in a records system	Metadata may relate to: <ul style="list-style-type: none"> • date, time and location of record creation or registration in the system • identity of record creator • indexing and descriptive terms • record format • security and access information • unique identifiers for each record.

Foundation Skills	Notes
Reading: Evaluates and interprets information from a range of relevant <i>sources</i> and identifies relevant and key information	Sources may include: <ul style="list-style-type: none"> • almanacs • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Numeracy: Uses <i>numerical systems</i> associated with record storage systems	Numerical systems may include: <ul style="list-style-type: none"> • file sequencing • file sizes • labelling • megabytes and gigabytes • network speeds (e.g. megabytes per second) • relative sizes (size of thumbnail image compared to a full featured image).
Technology: Uses <i>digital systems</i> and tools to complete tasks	Digital systems may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS501 Implement information and knowledge management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Identify learning requirements of <i>relevant stakeholders</i> for use of an information and knowledge management system	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • clients • employee representatives • funding bodies • industry associations • regulatory bodies and authorities • suppliers and contractors.
2.3 Organise and facilitate <i>learning activities</i>	<p>Learning activities may include:</p> <ul style="list-style-type: none"> • coaching and mentoring programs • help desks • information sessions, briefings, workshops and training programs • paper-based or electronic (including intranet) learning opportunities • use of expert workers, such as coaches and mentors to help other personnel use knowledge management systems.
Foundation Skills	Notes
Technology: Uses and investigates new <i>digital technologies</i> and applications to manage and manipulate data and communicate effectively with others	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management (CRM) system • databases • information management system • knowledge management system • online search engines • online platforms • word processing tools.
Assessment Conditions	Notes
<i>Workplace systems, documentation and resources</i> relevant to performance evidence.	<p>Workplace documentation may relate to:</p> <ul style="list-style-type: none"> • specific records that have been retrieved and used to provide information.



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BSBINS502 Coordinate data management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services BSB50920 Diploma of Quality Auditing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify data and <i>data sources</i> in organisation that require management	Data sources may include: <ul style="list-style-type: none"> databases information management systems remote drives servers imaging systems PC-based applications servers.
1.5 Document and create <i>data management plan</i> according to organisational policies and procedures	Data management plan may include: <ul style="list-style-type: none"> allocating access and security status classifying and indexing items generating and allocating unique identifiers to data items identifying and recording disposal status items identifying technical data and information creators locating and tracking items.
Foundation Skills	Notes
Reading: Critically analyses <i>complex documentation</i> from a variety of sources and consolidates information relating to specific criteria to determine requirements	Complex documentation may include: <ul style="list-style-type: none"> industry reports legislative and business requirements organisational charts policies and procedures (e.g. organisational or industry such as Australian Library and Information Association [ALIA]) relevant library legislation.
Technology: Uses familiar <i>technologies and systems</i> to access, enter, present and communicate data and information	Technologies and systems may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management (CRM) systems databases information management systems knowledge management systems online search engines online platforms word processing tools.



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BSBINS503 Monitor compliance with copyright and licence requirements

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50520 Diploma of Library and Information Services	N/A
Skill sets	BSBSS00115 Copyright Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Research information <i>sources</i> to keep abreast of information about copyright relevant to libraries and cultural institutions	Sources may include: <ul style="list-style-type: none"> • Australian Copyright Council • Australian Libraries Copyright Committee • copyright websites.
1.4 Identify sources of <i>specialist advice</i> about copyright legislation	Specialist advice may include: <ul style="list-style-type: none"> • Australian Library and Information Association (ALIA) • Australian Copyright Council • government agencies • internal copyright unit • legal advice • managers.
1.5 Advise <i>relevant stakeholders</i> about legal and economic implications of copyright infringement and other legislative obligations	Relevant stakeholders may include: <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.
Foundation Skills	Notes
Reading: Interprets <i>complex information</i> from sources to identify relevant and key information	Complex information may include: <ul style="list-style-type: none"> • industry reports • legislative and business requirements • organisational charts • policies and procedures (e.g. organisational or industry such as ALIA) • relevant library legislation.
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS503 Monitor compliance with copyright and licence requirements

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50520 Diploma of Library and Information Services	N/A
Skill sets	BSBSS00115 Copyright Management Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Monitor <i>licenses for digital rights</i> management on at least two occasions	<p>Licenses for digital rights may include:</p> <ul style="list-style-type: none"> • copyright schema (e.g. creative commons) • eBook databases or audio databases • journal databases • single use digital rights.
Knowledge Evidence	Notes
Features of <i>open source copyright licences</i>	<p>Open source copyright licences may include:</p> <ul style="list-style-type: none"> • varying levels of openness • varying levels of Creative Commons Licences.



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BSBINS504 Maintain digital repositories

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify <i>external standards</i> and requirements relevant to preservation and copyright of digital repositories	External standards may include: <ul style="list-style-type: none"> • Dublin Core • open access and interoperability OAI (open archives initiative) • preservation standard.
Foundation Skills	Notes
Reading: Interprets and critically analyses <i>complex text</i> to appropriately apply material to new or existing resources and distinguishes significant information from minor references	Complex text may include: <ul style="list-style-type: none"> • industry reports • legislative and business requirements • organisational charts • policies and procedures (e.g. organisational or industry such as Australian Library and Information Association [ALIA]) • relevant library legislation.
Numeracy: Correctly interprets and provides <i>numerical information</i> embedded in complex information sources	Numerical information may include: <ul style="list-style-type: none"> • file sizes • megabytes, gigabytes • network speeds (e.g. megabytes per second) • relative sizes (size of thumbnail image vs a full featured image).
Technology: Uses features of <i>digital tools</i> to complete complex tasks	Digital tools may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
Common <i>digital file formats</i>	Digital file formats may include: <ul style="list-style-type: none"> • gif • jpeg • MP3 • MP4 • PDF • web files.
<i>Current trends in digital repositories</i>	Current trends in digital repositories may include: <ul style="list-style-type: none"> • shift toward cloud-based technology.



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BSBINS505 Provide subject access and classify material

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and select subject headings according to <i>relevant standards</i>	<p>Relevant standards may relate to:</p> <ul style="list-style-type: none"> Library of Congress Subject Headings medical subject headings Schools Catalogue Information Service various control vocabulary.
1.4 Consult with <i>relevant stakeholders</i> to determine systematic and reasonable approaches to cataloguing complex material	<p>Relevant stakeholder may include:</p> <ul style="list-style-type: none"> employers managers supervisors teachers team leaders.
3.4 Comply with relevant <i>classification and assignment practice standards</i>	<p>Classification and assignment practice standards may include:</p> <ul style="list-style-type: none"> Dewey Decimal Classification Library of Congress Classification.
Foundation Skills	Notes
Technology: Uses main features and functions of <i>digital tools</i> to classify material and complete other work tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management systems (CRM) library management systems (LMS) online catalogues and search engines online platforms (e.g. for creating Dewey Decimal classification or subject heading) word processing tools.
Knowledge Evidence	Notes
<i>Current industry trends</i> relating to classification processes	<p>Current industry trends may involve:</p> <ul style="list-style-type: none"> Dewey Decimal Classification updates online changes participating in industry specific webinars reading industry relevant journals and magazines.



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BSBINS506 Implement lending and borrowing processes for collections

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Verify lending and borrowing procedures with <i>relevant stakeholders</i>	Relevant stakeholder may include: <ul style="list-style-type: none"> employers managers supervisors teachers team leaders.
2.1 Conduct <i>negotiations</i> with lenders and borrowers according to procedures according to organisational policies and procedures	Negotiations may include: <ul style="list-style-type: none"> lending negotiations negotiating with teachers for classroom subcollections negotiating with managers for changing borrowing procedures (e.g. extended borrowing periods) supplier negotiations.
3.1 Instigate <i>operational arrangements</i> for lending and borrowing to proceed	Operational arrangements may include: <ul style="list-style-type: none"> setting parameters in the library management system (LMS).
Foundation Skills	Notes
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management systems (CRM) library management systems (LMS) online catalogues and search engines online platforms word processing tools.
Performance Evidence	Notes
Work cooperatively with <i>others</i> involved in lending and borrowing collection material.	Others may include: <ul style="list-style-type: none"> internal team members.
Knowledge Evidence	Notes
Legal, <i>ethical and financial requirements</i> for lending and borrowing collection material	Ethical requirements may include: <ul style="list-style-type: none"> privacy of borrow and lender information. Financial requirements may include: <ul style="list-style-type: none"> fees interlibrary loans payment for lending.
Key <i>sources</i> for lending and borrowing collection material in a given work context	Sources may include: <ul style="list-style-type: none"> library collection partners and other branches in a council.



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BSBINS507 Use advanced functions of integrated library management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Maintain currency of knowledge of basic functions and interrelation of <i>different modules of an ILMS</i>	<p>Different modules of an ILMS may include:</p> <ul style="list-style-type: none"> • acquisitions and serial modules • cataloguing module • circulation module • discovery layer • federated searching • online public access catalogue • radio-frequency identification (RFIDs) • reports module. <p>ILMS environment is a dynamic environment with changing names for modules, based on provider.</p>
1.2 Provide information to <i>stakeholders</i> regarding online catalogue and circulation systems	<p>Relevant stakeholder may include:</p> <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.
2.4 Inform relevant stakeholders of costs of services and refer complex customer transactions to <i>relevant specialist</i>	<p>Relevant specialist may include:</p> <ul style="list-style-type: none"> • library management system (LMS) specialist • vendor or supplier of ILMS.
4.3 Consult with <i>relevant personnel</i> and make recommendations regarding improvements to ILMS	<p>Relevant stakeholder may include:</p> <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.
Foundation Skills	Notes
Reading: Critically organises, analyses, evaluates and applies content from a range of structurally <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • manuals for LMS • other instructional documents from vendor.
Technology: Utilises features of digital tools to complete <i>complex tasks</i>	<p>Complex tasks may include:</p> <ul style="list-style-type: none"> • cataloguing • creating records • creating reports • ordering records • setting up parameters • stocktakes.



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BSBINS507 Use advanced functions of integrated library management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Impact of <i>relevant legislation</i> on provision of library and information services.	Relevant legislation may include: <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • state or territory based Library Acts.
Assessment Conditions	Notes
Current industry <i>systems</i> , equipment, tools, materials and industry software packages relevant to performance evidence.	Systems may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS508 Research and analyse information to meet library customer needs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine information requirement with reference to <i>relevant documentation</i> or information from customers	<p>Relevant documentation may include:</p> <ul style="list-style-type: none"> • copyright requirements • legal formatting issues • organisational policies and procedures on levels of service provided and type of documentation passed on to clients • organisational templates.
2.4 Consult with <i>relevant stakeholders</i> , where required, to identify information sources	<p>Relevant stakeholder may include:</p> <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.

Foundation Skills	Notes
Reading: Critically organises, evaluates and applies content from a range of structurally <i>complex texts</i>	<p>Complex text may include:</p> <ul style="list-style-type: none"> • industry reports • legislative and business requirements • organisational charts • policies and procedures (e.g. organisational and industry such as Australian Library and Information Association [ALIA]) • relevant library legislation.
Technology: Utilises features of <i>digital tools</i> to complete complex tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS509 Promote literature and reading

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Source reviews about relevant literature from a range of <i>sources</i>	<p>Sources may include:</p> <ul style="list-style-type: none"> • databases • library catalogues • publishers' websites • reading and literature websites (e.g. GoodReads).
2.1 <i>Research methods</i> used to organise and access literature collections	<p>Research methods may include searches by:</p> <ul style="list-style-type: none"> • genre • plot line • reading level • theme • subject.
Foundation Skills	Notes
Technology: Uses a range of <i>digitally based technology</i> and applications to access and filter data, and then extract, organise, integrate and share relevant information	<p>Digitally based technology may include:</p> <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Knowledge Evidence	Notes
Key <i>methods</i> for arranging literature collections	<p>Methods may include:</p> <ul style="list-style-type: none"> • alphabetical by author • by genre • by reading level (e.g. beginner, adult).



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BSBINS510 Develop community and stakeholder relationships in a library environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria

1.1 Review and assess *current and potential stakeholders* and determine needs, interests, priorities and trends, in consultation with colleagues

2.1 Identify and assess a *range of strategies* to facilitate relationships between stakeholders and own organisation

Notes

Current and potential stakeholders may include:

- internal and external to system, (e.g. council, book clubs, schools, wider community where library is embedded).

Range of strategies may include:

- consultations
- events
- feedback meetings
- inviting relevant personnel to speak or attend events.

Foundation Skills

Reading: Interprets and analyses *complex documents* making connections to inform planning and strategy

Technology: Uses main features and functions of *digital tools* to complete work tasks

Notes

Complex documents may include:

- industry reports
- legislative and business requirements
- organisational charts
- policies and procedures (e.g. organisational and industry such as Australian Library and Information Association [ALIA])
- relevant library legislation.

Digital tools may include:

- citation tools
- cloud and digital platforms
- communication systems (e.g. emails, instant messaging)
- customer relationship management systems (CRM)
- library management systems (LMS)
- online catalogues and search engines
- online platforms
- word processing tools.

Knowledge Evidence

Promotion, advocacy and networks in libraries

Notes

Promotion may include:

- council newsletters
- flyers
- marketing
- peak body websites
- via website.

Advocacy may include:

- upwards to organisations that the library is a part of (e.g. schools, educators, councils)

Networks may include:

- ALIA
- community networks.



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BSBINS511 Develop and promote library activities, events and public programs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assess <i>external influences</i> that may impact development of programs	External influences may include: <ul style="list-style-type: none"> • budgets • community needs • socio-economic impacts.
3.2 Prepare timeframes with <i>relevant parties</i> , and take steps to coordinate with other activities	Relevant parties may be internal and external and include: <ul style="list-style-type: none"> • funding bodies • library management • marketing • outside speakers.
3.5 Undertake <i>risk audits</i> , including copyright issues, and take action according to organisational policies and procedures	Risk audits may relate to: <ul style="list-style-type: none"> • copyright and licencing • child safety • health and safety.
5.1 Collect and provide feedback from, and to, <i>relevant stakeholders</i>	Relevant stakeholder may include: <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.
Foundation Skills	Notes
Reading: Recognises and interprets <i>different texts</i> that meet requirements of the organisation	Different texts may include: <ul style="list-style-type: none"> • Copyright Act 1968 • state, territory or Commonwealth work health and safety (WHS) legislation. • external policies and procedure (e.g. compliance with school or council procedures).
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • desktop publishing programs • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.



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BSBINS511 Develop and promote library activities, events and public programs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Sustainable practice</i> and its relevance to development of public programs	Sustainable practice may include: <ul style="list-style-type: none"> • avoiding waste • environmental sustainability • programs to be reused (program structure).
<i>Techniques for planning and scheduling activities, events and public programs</i>	Techniques for planning and scheduling activities may relate to: <ul style="list-style-type: none"> • templates and forms (e.g. approval forms)



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BSBINS512 Monitor business records systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Select or develop a <i>metadata</i> standard to be applied to all records as they are captured into the records management system	<p>Metadata may relate to:</p> <ul style="list-style-type: none"> • date, time and location of record creation or registration into the system • identity of record creator • indexing and descriptive terms • record format • security and access information • unique identifiers for each record.
Foundation Skills	Notes
Reading: Evaluates and interprets information from a range of relevant <i>sources</i> and identifies relevant and key information	<p>Sources may include:</p> <ul style="list-style-type: none"> • almanacs • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Numeracy: Uses <i>numerical systems</i> associated with record storage systems	<p>Numerical systems may include:</p> <ul style="list-style-type: none"> • file sequencing • file sizes • labelling • megabytes and gigabytes • network speeds (e.g. megabytes per second) • relative sizes (size of thumbnail image vs full featured image).
Technology: Uses <i>digital systems</i> to develop and monitor business records system	<p>Digital systems may include:</p> <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management systems (CRM) • library management systems (LMS) • online catalogues and search engines • online platforms • word processing tools.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence.	<p>Workplace documentation may relate to:</p> <ul style="list-style-type: none"> • specific records that have been retrieved and used to provide information.



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BSBINS513 Contribute to records management framework

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.3 Define <i>relevant stakeholders</i> ' responsibilities according to regulatory requirements and organisational policies and procedures	Relevant stakeholders may include: <ul style="list-style-type: none"> • clients • colleagues • employee representatives • funding bodies • management • suppliers and contractors.
Performance Evidence	Notes
Analyse information from a range of <i>sources</i> to identify how records management framework can address compliance requirements, risks and liabilities arising from:	Sources may include: <ul style="list-style-type: none"> • almanacs • articles within databases • digital databases • encyclopedias • manuals • online searches • physical and online dictionaries • reference books • websites.
Knowledge Evidence	Notes
Key provisions of <i>relevant legislation, regulations and standards</i> applicable to the organisation	Legislation, regulations, industry and standards may include: <ul style="list-style-type: none"> • Fair Work Act 2009 • state, territory and Commonwealth work health and safety (WHS) legislation • Privacy Act 1988.



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BSBINS514 Contribute to records retention and disposal schedule

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital tools</i> and technologies in the information management process	Digital tools may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship management (CRM) systems online platforms search engines word processing tools.
Performance Evidence	Notes
Research records created by an organisation and create a detailed retention and disposal schedule within <i>legislative</i> and organisational <i>parameters</i> that includes disposal classes applying to at least three organisational functions.	Legislative parameters may relate to: <ul style="list-style-type: none"> Privacy Act 1988 state, territory and Commonwealth work health and safety (WHS) legislation.
Knowledge Evidence	Notes
<i>Risk analysis</i> applied to records systems	Risk analysis may include: <ul style="list-style-type: none"> assessing the effectiveness of existing controls defining the range of consequences environmental analysis (e.g. PESTEL and SWOT analyses) likelihood of each risk.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence.	Workplace documentation may relate to: <ul style="list-style-type: none"> specific records that have been retrieved and used to provide information.



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BSBINS515 Participate in archiving activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Analyse organisation's functions and requirement for archiving according to <i>legislation</i> , regulations and organisational policies and procedures	Legislation may relate to: <ul style="list-style-type: none"> • Privacy Act 1988 • state, territory and Commonwealth work health and safety (WHS) legislation.
1.3 Consult with <i>relevant stakeholders</i> and identify research value and access requirements	Relevant stakeholders may include: <ul style="list-style-type: none"> • clients • colleagues • employee representatives • funding bodies • management • suppliers and contractors.
Foundation Skills	Notes
Technology: Uses <i>digital systems</i> and tools to access, organise, analyse and display records, showing awareness of the need for data security	Digital systems may include: <ul style="list-style-type: none"> • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship management (CRM) systems • databases • online search engines • online platforms • word processing tools.
Assessment Conditions	Notes
<i>Relevant statistical information</i>	Relevant statistical information may relate to: <ul style="list-style-type: none"> • usage of archived materials • metadata for materials.



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BSBINS516 Undertake cataloguing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Confirm created records include sufficient and <i>relevant access points</i> for ease of retrieval by catalogue users	<p>Relevant access points may include:</p> <ul style="list-style-type: none"> • author • creator names • subject • titles.
4.3 Consult with <i>relevant stakeholders</i> regarding cataloguing issues or problems and take required action	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • customers • employers • managers • patrons • supervisors • teachers • team leaders.
Foundation Skills	Notes
Technology: Uses a range of <i>digitally based technologies</i> to access, extract and share relevant information to achieve required outcomes	<p>Digitally based technologies may include:</p> <ul style="list-style-type: none"> • citation tools • cloud and digital platforms • communication systems (e.g. emails, instant messaging) • customer relationship managements (CRM) system • library management systems (LMSs) • online catalogues and search engines • online platforms (e.g. for creating Dewey Decimal classification or subject heading) • word processing tools.
Knowledge Evidence	Notes
Commonly used <i>automated cataloguing systems</i> and shared cataloguing networks	<p>Automated cataloguing systems may be found within the LMS as a module.</p> <p>Shared catalogues networks may include:</p> <ul style="list-style-type: none"> • External Libraries Australia • Library of Congress • OCLC • The Schools Catalogue Information Service (SCIS)



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BSBINS601 Manage knowledge and information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services BSB60120 Advanced Diploma of Business BSB60720 Advanced Diploma of Program Management
Skill sets	BSBSS00123 Records and Information Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.6 Consult <i>relevant stakeholders</i> and collect and review relevant knowledge	Relevant stakeholders may include: <ul style="list-style-type: none"> clients colleagues employee representatives funding bodies management suppliers and contractors.
3.4 Consult <i>specialists</i> and other relevant stakeholders	Specialists may include: <ul style="list-style-type: none"> external specialists (e.g. environmental consultants, financial specialists, Safe Work representatives) internal specialists (e.g. operations managers, work health and safety [WHS] specialists, human resources [HR] specialists).
Foundation Skills	Notes
Technology: Uses <i>digital technologies</i> to manage knowledge and information and actively investigates new technologies for strategic and operational purposes	Digital technologies may include: <ul style="list-style-type: none"> cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship managements (CRM) system online platforms search engines word processing tools.
Assessment Conditions	Notes
<i>Legislation</i> , regulations, standards and codes relevant to managing knowledge and information	Legislation may relate to: <ul style="list-style-type: none"> Privacy Act 1988 state, territory and Commonwealth work health and safety (WHS) legislation.



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BSBINS602 Extend own information literacy skills to locate information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50520 Diploma of Library and Information Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify information literacy concepts and what constitutes an <i>information literate person</i>	<p>Information literate person may include:</p> <ul style="list-style-type: none"> ability to read and write reference to Standards for Information Literacy (Australian and New Zealand information literacy standard).
1.3 Develop effective search strategies and select <i>relevant search tools</i> to locate information from primary, secondary and tertiary sources	<p>Relevant search tools may include:</p> <ul style="list-style-type: none"> advanced searches boolean catalogues databases truncation.
2.4 Communicate with <i>relevant stakeholders</i> in relation to information requests according to organisational policies	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> customers employers managers patrons supervisors teachers team leaders.
Foundation Skills	Notes
Technology: Uses a range of <i>digitally based technology</i> and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways	<p>Digitally based technologies may include:</p> <ul style="list-style-type: none"> citation tools cloud and digital platforms communication systems (e.g. emails, instant messaging) customer relationship managements (CRM) system library management system (LMS) online catalogues and search engines online platforms word processing tools.
Knowledge Evidence	Notes
Key principles of <i>lifelong learning</i> and how they relate to information literacy	<p>Lifelong learning may include:</p> <ul style="list-style-type: none"> continuous learning self directed.



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BSBINS603 Initiate and lead applied research

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services BSB80120 Graduate Diploma of Management (Learning) BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Clarify and confirm applied research purpose and requirements of <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> clients colleagues employee representatives funding bodies management suppliers and contractors.
1.5 Review relevant research <i>ethics and codes of conduct</i>	Ethics and codes of conduct may relate to: <ul style="list-style-type: none"> controlled access records quality responsibility and accountability security.
Foundation Skills	Notes
Reading: Collects, analyses, compares and evaluates textual information from a range of <i>resources</i> to inform research strategies	Resources may include: <ul style="list-style-type: none"> almanacs articles within databases digital databases encyclopedias manuals online searches physical and online dictionaries reference books websites.
Knowledge Evidence	Notes
<i>Data collection</i> and analysis methods, including the use of technology and technology services	Data collection may include: <ul style="list-style-type: none"> action research classification experiments interviews participant observation physical traces analysis semiotics surveys statistical data analysis statistical surveys.
Assessment Conditions	Notes
<i>Legislation</i> and codes of conduct relevant to research.	Legislation may relate to: <ul style="list-style-type: none"> Privacy Act 1988 state, territory and Commonwealth work health and safety (WHS) legislation.



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BSBINS604 Contribute to collection management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria

1.2 Conduct a *community needs assessment* to assist with developing collection to reflect current and future needs

Community needs assessment may include:

- assessing library management system (LMS) statistics
- surveys for feedback
- taking recommendations from clients or patrons.

1.3 *Source information* on current and emerging trends and formats relevant to customer needs in relation to collections

Sources of information may include:

- Australian Library and Information Association (ALIA)
- online databases
- publishing trends.

Foundation Skills

Reading: Synthesises and evaluates information from a broad range of *complex texts* and applies this knowledge to improve work practices and collections

Notes

Complex texts may include:

- industry reports
- legislative and business requirements
- organisational charts
- policies and procedures (e.g. organisational and industry such as ALIA)
- relevant library legislation.

Technology: Uses a range of *digital technology* and applications to access and filter data, and then extract, organise, integrate and share relevant information in effective ways

Digital technology may include:

- citation tools
- cloud and digital platforms
- communication systems (e.g. emails, instant messaging)
- customer relationship management systems (CRM)
- library management systems (LMS)
- online catalogues and search engines
- online platforms
- word processing tools.

Knowledge Evidence

Weeding and stocktaking procedures

Notes

Weeding and stocktaking procedures may include:

- evaluation parameters
- organisational requirements (e.g. registers and disposal of resources in ways that are approved by an external body).



Leadership

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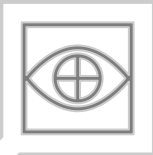
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Leadership Unit Sector Overview

The Leadership (LDR) unit sector incorporates units of competency aimed at supporting individuals in a range of industries to develop skills and knowledge relevant for a range of leadership and management job roles.

Leadership skills enable a person to interact with others in a way that improves collective performance. For this reason, effective leadership can produce desired organisational outcomes. These competencies are important for, not only individuals in management roles, but for individuals across the workforce.



Glossary of common terminology

Code of practice	A code of practice is a document prepared to provide practical guidance on how to comply with a general duty or specific duties according to specified standards or legislation.
Organisational / workplace policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational / workplace procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Leadership Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Leadership' unit stream, please refer to the interpretation guidance provided on pages 242 - 268. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBLDR301 Support effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Locate and communicate to work team <i>organisational processes</i> for communication and teamwork	<p>Organisational processes may relate to:</p> <ul style="list-style-type: none"> communicating with the media communication protocols meeting protocols (online and face-to-face) organisational and industry codes of conduct organisational policies and procedures.
2.1 <i>Encourage communication</i> within team according to <i>organisation's social, ethical and business policies and procedures</i>	<p>Encouraging communication may involve:</p> <ul style="list-style-type: none"> affirmation of contribution. <p>Organisation's social, ethical and business policies and procedures may relate to:</p> <ul style="list-style-type: none"> anti-discrimination appropriate use of communication channels (e.g. email, newsletters, telephone calls, meetings) diversity and inclusion organisational and industry codes of conduct organisation vision, mission and value statements psychological safety.
2.2 Adjust <i>interpersonal styles and methods</i> in relation to the organisation's social and cultural environment	<p>Interpersonal styles and methods may relate to:</p> <ul style="list-style-type: none"> dependability flexibility self-awareness self-motivation.
3.2 Support colleagues in resolving work difficulties related to own level of responsibility, according to <i>organisational and legal requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> grievance handling policies and procedures performance management support. <p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
3.3 Review team outcomes and <i>implement improvements</i> in consultation with <i>relevant personnel</i>	<p>Implementing improvements may depend on:</p> <ul style="list-style-type: none"> level of complexity. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> personnel across different teams (e.g. human resources (HR) and finance) team leaders team managers.



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BSBLDR301 Support effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses familiar <i>digital technologies and systems</i> to access, present and communicate information	<p>Digital technologies and systems may include:</p> <ul style="list-style-type: none"> cloud-based systems customer management systems (CMS) email services shared drives spreadsheets text messages virtual meeting technology word processing tools.
<p>Knowledge Evidence</p> <p><i>Internal and external sources of information</i> to improve organisational processes</p>	<p>Internal sources of information may include:</p> <ul style="list-style-type: none"> employee conversations feedback surveys observations team meetings. <p>External sources of information may include:</p> <ul style="list-style-type: none"> client and customer complaints (e.g. feedback surveys) industry data verifiable sources and websites. <p>Sources of information may depend on organisational policies and procedures.</p>
<p><i>Methods and techniques</i> for communicating information and ideas to a range of <i>stakeholders</i></p>	<p>Methods may include:</p> <ul style="list-style-type: none"> emails discussion boards forums meetings organisational intranet text messages. <p>Techniques may include:</p> <ul style="list-style-type: none"> push, pull and interactive communication sharing. <p>Stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. contractors, customers, suppliers) internal stakeholders (e.g. colleagues, other organisation departments, supervisors, team leaders).
Common <i>problem-solving methods</i>	<p>Problem-solving methods may include:</p> <ul style="list-style-type: none"> brainstorming discussing negotiating plan-do-check-act (PDCA) cycle.



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BSBLDR301 Support effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Common methods to resolve workplace conflict</i>	<p>Methods to resolve workplace conflict may include:</p> <ul style="list-style-type: none"> • following organisational grievance procedures • mediating • negotiating • reporting conflict to supervisors • self-reflecting. <p>Methods may be aligned to organisational human resources (HR) requirements.</p>
<i>Process for monitoring, analysing and introducing ways to improve work relationships</i>	<p>Processes for monitoring and analysing may include:</p> <ul style="list-style-type: none"> • coaching and mentoring • conducting organisational health checks • conducting performance appraisals and reviews • observing teamwork • participating in discussions.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to workplace relationships	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • communication protocols • diversity and inclusion policies • grievance procedures • organisational structure and hierarchy documents.



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BSBLDR411 Demonstrate leadership in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40520 Certificate IV in Leadership and Management	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40720 Certificate IV in Library and Information Services BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>qualities required for positive management performance</i> according to organisational policies and procedures	<p>Qualities required for positive management performance may include:</p> <ul style="list-style-type: none"> ability to adapt leadership style depending on situation ability to empower and motivate staff emotional intelligence (e.g. self-awareness, understanding of self control) resilience.
1.3 Develop and implement <i>performance plans</i> for individual and team according to organisation's business objectives	<p>Performance plans may include:</p> <ul style="list-style-type: none"> operations plans performance objectives responsibilities specific actions team plans timeframes.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>text</i> relating to organisational goals, standards and values to aid planning and decision making	<p>Texts may include:</p> <ul style="list-style-type: none"> documentation that informs performance plans organisational vision, mission and value statements performance appraisals policies related to equal employment opportunity (EEO) and diversity strategic and workforce plans.
Knowledge Evidence	Notes
<i>Methods to identify an organisation's standards and values</i> when they are <i>stated</i> , and where they are <i>implied</i>	<p>Methods to identify an organisation's standards and values may include:</p> <ul style="list-style-type: none"> discussing with leaders and managers in team meetings networking referring to onboarding and induction documents using an organisation's website. <p>Methods may be stated in:</p> <ul style="list-style-type: none"> key performance indicators (KPIs) organisational codes of conduct. <p>Methods may be implied in:</p> <ul style="list-style-type: none"> informal practices and understandings organisational culture.



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BSBLDR411 Demonstrate leadership in the workplace**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40520 Certificate IV in Leadership and Management	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40720 Certificate IV in Library and Information Services BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Basic leadership theories</i>	Basic leadership theories may include: <ul style="list-style-type: none"> • adaptive • autocratic • situational • strength-based • transformational.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation may include: <ul style="list-style-type: none"> • business plans • feedback surveys and forms • meeting minutes • reports • service-level agreements (SLAs).



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BSBLDR412 Communicate effectively as a workplace leader

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Evaluate available <i>methods of communication</i> according to task requirements and organisational business policies and procedures	Methods of communication may include: <ul style="list-style-type: none"> verbal communication (e.g. in-person and virtual meetings) written communication (e.g. emails, reports).
1.4 Identify <i>potential barriers to effective communication</i> and develop solutions to minimise impact	Potential barriers to effective communication may relate to: <ul style="list-style-type: none"> cultural differences literacy levels methods of delivery (e.g. access to digital technologies) physical distance psychological barriers.
2.1 Communicate using <i>media</i> and format relevant to the context	Media may include: <ul style="list-style-type: none"> emails social media text messages written and visual documents.
Foundation Skills	Notes
Writing: Plans and prepares <i>workplace documentation</i> for <i>relevant stakeholders</i> according to organisational formats	Workplace documentation may include: <ul style="list-style-type: none"> business plans feedback surveys and forms meeting minutes reports service-level agreements (SLAs). Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. contractors, customers, suppliers) internal stakeholders (e.g. colleagues, other organisational departments, supervisors, team leaders).



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BSBLDR412 Communicate effectively as a workplace leader

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Legislation requirement and organisational policies on workplace communication</i>	<p>Legislation requirements may relate to:</p> <ul style="list-style-type: none"> local, state and territory work health and safety (WHS) legislation Privacy Act 1988. <p>Organisational policies may relate to:</p> <ul style="list-style-type: none"> diversity and inclusion grievance procedures performance management style guides.
<i>Electronic and non-electronic communication methods, including situations where they would or would not be used</i>	<p>Electronic communication methods may include:</p> <ul style="list-style-type: none"> emails social media text messages virtual meetings. <p>Non-electronic communication methods may include:</p> <ul style="list-style-type: none"> in-person meetings letters reports and other written documents.
<i>Common feedback process and methods</i>	<p>Feedback processes may include:</p> <ul style="list-style-type: none"> peer evaluation performance reviews self-reflection. <p>Feedback methods may include:</p> <ul style="list-style-type: none"> in-person conversations toolbox talks virtual meetings written feedback.
Assessment Conditions	Notes
<i>Workplace documentation and resources for communication and leadership</i>	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> business plans feedback surveys and forms meeting minutes reports SLAs.



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BSBLDR413 Lead effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40320 Certificate IV in Entrepreneurship and New Business BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Share ideas and information with <i>relevant internal and external stakeholders</i> according to work task	<p>Relevant internal stakeholders may include:</p> <ul style="list-style-type: none"> business partners colleagues human resources (HR) officers supervisors team leaders team members. <p>Relevant external stakeholders may include:</p> <ul style="list-style-type: none"> customers industry bodies suppliers.
3.1 Seek feedback on relationship management for work task from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include those listed under 'relevant internal stakeholders' and 'relevant external stakeholders' above.</p>
Foundation Skills	Notes
Initiative and enterprise: Identifies and follows <i>legislative and organisational requirements</i> relevant to own role	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> local, state and territory work health and safety (WHS) legislation Privacy Act 1988. <p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> diversity and inclusion policies grievance procedures performance management policies style guides.
Teamwork: Selects and uses <i>appropriate conventions and protocols when communicating</i> with diverse stakeholders	<p>Appropriate conventions and protocols when communicating may relate to:</p> <ul style="list-style-type: none"> business etiquette communications policies culture and diversity legislation.



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BSBLDR413 Lead effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40320 Certificate IV in Entrepreneurship and New Business BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Access and analyse <i>information required to achieve planned outcomes</i>	Information required to achieve planned outcomes may relate to: <ul style="list-style-type: none"> information received from stakeholders longer-term goals and focus points operational and strategic plans outcome dependencies process flows.
Apply <i>techniques for resolving problems and conflicts</i> , and dealing with poor performance according to organisational and legislative requirements	Techniques for resolving problems and conflicts may include using: <ul style="list-style-type: none"> appropriate communication techniques listening skills mediation one-on-one meetings with supervisors referral and escalation processes.
Knowledge Evidence	Notes
<i>Common methods to manage poor work performance</i>	Methods to manage poor work performance may include: <ul style="list-style-type: none"> conducting training needs analysis establishing buddy systems following performance management processes providing coaching and mentoring.
<i>Common methods to monitor, analyse and improve work relationships</i>	Methods to monitor work relationships may include using: <ul style="list-style-type: none"> informal feedback surveys and forms targeted questions. Methods to analyse work relationships may include: <ul style="list-style-type: none"> conducting trend analysis finding root cause of problems. Methods to improve work relationships may include: <ul style="list-style-type: none"> developing performance plans holding regular reviews and check-ins.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation may include: <ul style="list-style-type: none"> business plans feedback surveys and forms meeting minutes reports service-level agreements (SLAs).



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BSBLDR414 Lead team effectiveness

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40520 Certificate IV in Leadership and Management BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Encourage team members to incorporate <i>innovation and productivity measures</i> in work plans	Innovation and productivity measures may relate to: <ul style="list-style-type: none"> • benchmarking data • customer demand • organisational continuous improvement strategies • team efficiencies.
Foundation Skills	Notes
Teamwork: Selects and uses <i>appropriate conventions and protocols when communicating</i> with team members	Appropriate conventions and protocols when communicating may relate to: <ul style="list-style-type: none"> • business etiquette • communications policies • culture and diversity • legislation.
Knowledge Evidence	Notes
<i>Behaviours which enhance organisational image</i> for work team, clients and customers	Behaviours which enhance organisational image may relate to: <ul style="list-style-type: none"> • organisational policies and procedures • organisational vision and values • professional conduct.
<i>Processes for setting goals</i> that contribute to team effectiveness	Processes for setting goals may include: <ul style="list-style-type: none"> • benchmarking against historical data • developing SMART (specific, measurable, achievable, realistic, timely) goals
<i>Key features of common leadership styles</i>	Key features of common leadership styles may include: <ul style="list-style-type: none"> • courage • mindfulness • vulnerability.



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BSBLDR521 Lead the development of diverse workforces

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00117 Diversity and Inclusion Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Qualify and quantify the <i>source of workforce diversity</i>	<p>Sources of workforce diversity may include:</p> <ul style="list-style-type: none"> board quotas diversity targets and key performance indicators (KPIs) reconciliation action plans (RAP).
1.3 Identify <i>legislation and organisational policies and procedures</i> that relate to workplace diversity	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 Privacy Act 1988 (Part III, Division 2: Australian Privacy Principles). <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> equal employment opportunities (EEO) organisational and industry codes of conduct RAP.
1.4 Identify <i>opportunities and barriers to inclusive engagement</i>	<p>Opportunities to inclusive engagement may refer to:</p> <ul style="list-style-type: none"> accessibility anti-discrimination EEO induction programs RAP. <p>Barriers to inclusive engagement may include:</p> <ul style="list-style-type: none"> environmental issues geographical location individual and organisational prejudices and perceptions mental health organisational hierarchy.
3.3 Provide <i>workplace support and access to diversity services</i>	<p>Workplace support may be required for:</p> <ul style="list-style-type: none"> disability equitable access language and literacy requirements. <p>Diversity services may include:</p> <ul style="list-style-type: none"> assistive technologies employee assistance programs (EAPs).



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BSBLDR521 Lead the development of diverse workforces

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00117 Diversity and Inclusion Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Teamwork: Implements <i>communication strategies</i> and behaviours for a diverse range of colleagues to build rapport and foster strong relationships	Communication strategies may include: <ul style="list-style-type: none"> considering cultural sensitivities using interpretation and translation services using verbal and non-verbal communication.
Knowledge Evidence	Notes
Types of <i>diverse individuals and groups</i> in the workplace	Diverse individuals and groups may relate to: <ul style="list-style-type: none"> age differences cultural and linguistic diversity differing capabilities, skills and knowledge legislative categories (e.g. marital status, gender, religion) positional authority.
<i>Strategies, tools and techniques</i> for integrating and engaging a diverse workforce	Strategies, tools and techniques may relate to: <ul style="list-style-type: none"> autonomous work structures communication consequences for not integrating and engaging a diverse workforce cultural awareness and recognition flexible and inclusive work practices training and development opportunities.
Assessment Conditions	Notes
<i>Legislation and regulations</i> related to workforce diversity	Legislation may include: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. Regulations may relate to: <ul style="list-style-type: none"> change management and reporting EEO industry standards and codes of practice.
<i>Workplace policies and procedures</i> related to working with diversity	Workplace policies and procedures may relate to: <ul style="list-style-type: none"> bullying diversity and inclusion organisational and industry codes of conduct.



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BSBLDR522 Manage people performance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult <i>relevant groups and individuals</i> on work to be allocated and resources available	Relevant groups and individuals may include: <ul style="list-style-type: none"> external groups and individuals (e.g. contractors, unions) internal groups and individuals (e.g. internal teams, management).
1.2 Develop work plans and allocate work according to organisational requirements and <i>operational plans</i>	Operational plans may include: <ul style="list-style-type: none"> capability plans project plans succession plans team plans.
1.3 Develop and confirm performance standards and key performance indicators with <i>relevant staff</i> prior	Relevant staff may include: <ul style="list-style-type: none"> human resources (HR) officers managers senior management.
1.4 Conduct risk analysis according to <i>organisational risk management plan</i> and legal requirements	Organisational risk management plans may relate to: <ul style="list-style-type: none"> brand damage financial risk loss of customers skills shortages workforce planning.
4.2 <i>Monitor underperforming individuals</i> according to organisational policies	Monitoring underperforming individuals may include: <ul style="list-style-type: none"> considering industrial relations awards consulting with HR creating and tracking improvement plans identifying skills gaps and motivational issues.
4.4 Reinforce excellence in performance through <i>recognition and continuous feedback</i>	Recognition and continuous feedback may relate to: <ul style="list-style-type: none"> individual performance plans organisational excellence and rewards policies organisational performance standards and codes of conduct.



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BSBLDR522 Manage people performance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>texts</i> in organisational documents to facilitate performance management	Texts may include: <ul style="list-style-type: none"> • performance reviews • performance standards • professional development plans • training plans.
Teamwork: Applies the <i>protocols governing what to communicate</i> to whom and how in a range of work contexts	Protocols governing what to communicate may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • communications policies • enterprise agreements • grounds to dismiss people • privacy and confidentiality • professional conduct.
Knowledge Evidence	Notes
Organisational <i>human resource support services</i>	Human resource support services may be sourced from: <ul style="list-style-type: none"> • HR business partners.
Organisational <i>performance measurement systems</i>	Performance measurement systems may involve: <ul style="list-style-type: none"> • client and customer feedback reviews • key performance indicators (KPIs) • return on investment (ROI) • self-assessments • surveys (e.g. staff satisfaction).
<i>Key features of unlawful dismissal rules</i> and due process	Key features of unlawful dismissal rules may relate to: <ul style="list-style-type: none"> • Fair Work Act 2009 • HR • industrial relations (IR) • organisational policies and procedures (e.g. grievance policies and mediation processes) • unions.
<i>Staff development options and information</i>	Staff development options and information may relate to: <ul style="list-style-type: none"> • operations plans • performance objectives • responsibilities • team plans • timeframes.



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BSBLDR522 Manage people performance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Legislation</i> on performance management	Legislation may include: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009.
<i>Workplace documentation</i> and resources for performance management and review	Workplace documentation may include: <ul style="list-style-type: none"> business and operations plans feedback surveys and forms meeting minutes reports service-level agreements (SLAs).



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BSBLDR523 Lead and manage effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify required processes for <i>workplace collaboration</i> according to <i>organisational policies and procedures</i>	<p>Workplace collaboration may involve:</p> <ul style="list-style-type: none"> asynchronous collaboration cloud-collaboration digital software and platforms. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> anti-discrimination inclusive practices organisational and industry codes of conduct.
1.2 Develop <i>consultation processes</i> for employees to contribute to issues related to their work role	<p>Consultation processes may involve:</p> <ul style="list-style-type: none"> audit and quality checks coaching and mentoring health and safety representatives (HSRs) networking opportunities performance reviews strategic reviews.
1.3 Develop <i>processes for conflict management</i>	<p>Processes for conflict management may include:</p> <ul style="list-style-type: none"> mediation one-on-one meetings with supervisors referral and escalation.
1.4 Develop <i>processes for escalated issues</i> or refer to relevant personnel	<p>Processes for escalated issues may include:</p> <ul style="list-style-type: none"> enlisting external agencies for support following human resources (HR) policies and procedures.
3.1 Seek feedback on management of workplace relationships from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers, industry bodies, suppliers) internal stakeholders (e.g. business partners, HR officers, colleagues, team leaders, supervisors, team members).



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BSBLDR523 Lead and manage effective workplace relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Systems, policies and procedures</i> that can support the development of effective work relationships	<p>Systems, policies and procedures may relate to:</p> <ul style="list-style-type: none"> • inclusive practices • organisational and industry codes of conduct • organisational processes.
Assessment Conditions	Notes
<i>Legislation, regulations, standards and codes</i> relevant to workplace relationships	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988. <p>Regulations, standards and codes may relate to:</p> <ul style="list-style-type: none"> • change management and reporting • diversity • equal employment opportunity (EEO) • industry standards and codes of practice.
<i>Workplace documentation</i> and resources for workplace relationships	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • business plans • feedback surveys and forms • meeting minutes • reports • service-level agreements (SLAs).



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BSBLDR601 Lead and manage organisational change

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB50820 Diploma of Project Management BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60520 Advanced Diploma of Marketing and Communication BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify major <i>operational change requirements</i> according to organisational objectives, performance gaps, business opportunities or threats, and management decisions	Operational change requirements may relate to: <ul style="list-style-type: none"> business operational changes change management processes organisational market share pricing changes quality checks and monitoring systems.
1.3 Consult <i>stakeholders, specialists and experts</i> to confirm the change management opportunities and process	Stakeholders, specialists and experts may include: <ul style="list-style-type: none"> external consultants industrial relations (IR) officers peak industry bodies unions.
2.1 Assign resources to the project and confirm <i>reporting protocols</i> with <i>relevant stakeholders</i>	Reporting protocols may include: <ul style="list-style-type: none"> developing and following a communications plan. Relevant stakeholders may include: <ul style="list-style-type: none"> personnel across different teams (e.g. human resources [HR] and finance) team leaders team managers.
2.2 Develop <i>communication or education plan</i> , in consultation with <i>relevant personnel</i>	Communication or education plans may include: <ul style="list-style-type: none"> skills matrix training needs analysis. Relevant personnel may include those listed under 'relevant stakeholders' above.
3.2 Identify and respond to <i>barriers to the change</i> according to risk management plans and organisational objectives	Barriers to the change may relate to: <ul style="list-style-type: none"> IR resource availability timing unions.



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BSBLDR601 Lead and manage organisational change

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB50820 Diploma of Project Management BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60520 Advanced Diploma of Marketing and Communication BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management BSB80120 Graduate Diploma of Management (Learning)
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Teamwork: Uses a variety of <i>communication</i> tools and <i>strategies</i> to build and maintain effective working relationships	Communication strategies may include: <ul style="list-style-type: none"> considering cultural sensitivities using interpretation and translation services using verbal and non-verbal communication.
Knowledge Evidence	Notes
<i>Events or trends</i> that may impact on the achievement of organisational objectives	Events or trends may include: <ul style="list-style-type: none"> capability and skills gaps changes in technology economic trends global pandemics legislative changes resource availability workforce demands.
<i>Methods for conducting cost-benefit analysis</i> for high priority change requirements and opportunities	Methods for conducting cost-benefit analysis may include: <ul style="list-style-type: none"> earned value environmental analysis (e.g. PESTEL and SWOT analyses). <p>Methods may depend on the type of organisational change.</p>
<i>Methods for conducting risk analysis</i> , including barriers to change and relevant mitigation strategies	Methods for conducting risk analysis may include: <ul style="list-style-type: none"> environmental analysis (e.g. PESTEL and SWOT analyses).
<i>Change management processes or cycles and strategies</i> for communicating and embedding change	Change management processes or cycles and strategies may relate to: <ul style="list-style-type: none"> DREC (denial, resistance, exploration, commitment) curves the psychology of changes.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to organisational change management.	Workplace documentation may include: <ul style="list-style-type: none"> business and communications plans feedback surveys and forms meeting minutes reports service-level agreements (SLAs).



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BSBLDR602 Provide leadership across the organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60420 Advanced Diploma of Leadership and Management	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	BSBSS00114 Organisational Governance Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.3 Facilitate integration of <i>global environment and new technology</i> into work activities	<p>Global environment and new technology may relate to:</p> <ul style="list-style-type: none"> cloud-based technology cyber security geo-political considerations timezone considerations.
4.2 Adapt <i>interpersonal and leadership styles</i> to meet circumstances and situations	<p>Interpersonal and leadership styles may relate to:</p> <ul style="list-style-type: none"> international and culturally diverse circumstances and situations.
Foundation Skills	Notes
Reading: Evaluates and integrates facts and ideas to construct meaning from a range of <i>text types</i>	<p>Text types may include:</p> <ul style="list-style-type: none"> organisational vision, mission and value statements performance management documentation policies related to equal employment opportunity (EEO) and diversity strategic and workforce plans.
Performance Evidence	Notes
Communicate the organisation's objectives, values and standards to a range of <i>stakeholders</i> using appropriate <i>media</i> and language	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. consultants, industrial relations [IR]) internal stakeholders (e.g. managers, team members). <p>Media may include:</p> <ul style="list-style-type: none"> emails organisational intranet text messages virtual meetings. <p>Appropriate media may depend on cultural differences and accessibility.</p>



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BSBLDR602 Provide leadership across the organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60420 Advanced Diploma of Leadership and Management	BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	BSBSS00114 Organisational Governance Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Business ethics</i> and its application to leadership styles and the organisation's mission, objectives and values	Business ethics may relate to: <ul style="list-style-type: none"> Corporate Social Responsibility (CSR) legislation organisational policies and procedures.
Organisational <i>research</i> and implementation <i>methods</i>	Research methods may include: <ul style="list-style-type: none"> engaging an external organisation to access and undertake research (e.g. Australian Bureau of Statistics [ABS] data).
<i>Processes to establish and maintain a positive work environment</i> for individuals and teams	Processes to establish and maintain a positive work environment may include: <ul style="list-style-type: none"> frequent communication between individuals and teams incorporating a global perspective.
Assessment Conditions	Notes
<i>Legislation, regulation, standards and codes</i>	Legislation may include: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. Regulation, standards and codes may relate to: <ul style="list-style-type: none"> organisational and industry codes of conduct.
<i>Workplace documentation</i> and resources required to make leadership decisions	Workplace documentation may include: <ul style="list-style-type: none"> business plans feedback surveys and forms meeting minutes organisational vision, mission and value statements reports service-level agreements (SLAs).



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BSBLDR811 Lead strategic transformation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80120 Graduate Diploma of Management (Learning) BSB80320 Graduate Diploma of Strategic Leadership	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify personal responsibilities in <i>strategic transformation process</i> according to task objectives	<p>Strategic transformation processes may relate to:</p> <ul style="list-style-type: none"> identifying timeframes innovation planning long-term goals restructuring reengineering short term goals (viability).
1.2 Develop <i>strategic change strategy</i> in collaboration with relevant stakeholders	<p>Strategic change strategy may relate to items listed under 'strategic transformation processes' above.</p>
1.3 Brief <i>internal and external stakeholders</i> of strategic change processes and intended outcomes	<p>Internal stakeholders may include:</p> <ul style="list-style-type: none"> boards heads of department managers team members. <p>External stakeholders may include:</p> <ul style="list-style-type: none"> consultants government agencies industrial relations (IR) officers peak industry bodies and associations unions.
1.4 Establish <i>communication channels</i> for organisational personnel to contact management	<p>Communication channels may include:</p> <ul style="list-style-type: none"> emails face-to-face and virtual meetings telephone calls texts.
2.3 Develop <i>learning and communication processes</i> for addressing problems and risks arising during organisational change	<p>Learning and communication processes may include:</p> <ul style="list-style-type: none"> change management communication collecting and analysing information competency for change problem resolution stakeholder communication plan.
Knowledge Evidence	Notes
Key <i>stakeholders</i> involved in strategic change	<p>Key stakeholders may include those listed under 'internal stakeholders' and 'external stakeholders' above.</p>
Range of <i>leadership styles</i>	<p>Leadership styles may include:</p> <ul style="list-style-type: none"> autocratic democratic laissez faire participative strategic transformational.



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BSBLDR811 Lead strategic transformation**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80120 Graduate Diploma of Management (Learning) BSB80320 Graduate Diploma of Strategic Leadership	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Personal development planning methodologies</i>	<p>Personal development planning may relate to:</p> <ul style="list-style-type: none"> • buddy systems • coaching and mentoring • performance management reviews • self-reflection • training needs analysis. <p>Methodologies may relate to:</p> <ul style="list-style-type: none"> • systemic responses (e.g. self evaluation processes, formalised performance feedback, systems for skills assessment).
Assessment Conditions	Notes
<i>Legislation, regulations and codes of practice relevant to business strategic change</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988. <p>Regulations and codes of practice may relate to:</p> <ul style="list-style-type: none"> • change management and reporting • equal employment opportunity (EEO) • industry standards • ethical standards.



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BSBLDR812 Develop and cultivate collaborative partnerships and relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Establish key indicators and <i>feedback processes</i> for evaluating the health of the business partnerships	<p>Feedback processes may involve:</p> <ul style="list-style-type: none"> client and customer feedback internal data (e.g. staff retention) industry benchmarks and best practices surveys (e.g. staff satisfaction).
1.5 Identify and implement <i>strategies for staff and stakeholder commitment and contribution</i>	<p>Strategies for staff and stakeholder commitment and contribution may include:</p> <ul style="list-style-type: none"> performance reviews regular communication and feedback meetings team building strategic workshops 360 feedback..
2.1 Identify <i>legal framework and processes for partnership activity</i> in collaboration with partners	<p>Legal frameworks and processes for partnership activity may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Corporations Act 2001 local, state and territory work health and safety (WHS) legislation Partnership Act Privacy Act 1988 <p>Partnership may relate to:</p> <ul style="list-style-type: none"> agreement between parties and operation (e.g. joint venture, partnership agreement, alliance)
2.3 Establish <i>processes to resolve conflict</i> in a fair, equitable and collaborative manner between partners	<p>Processes to resolve conflict may include:</p> <ul style="list-style-type: none"> mediation one-on-one meetings with supervisors referral and escalation. <p>May relate to previous agreements (e.g. partnership agreement, terms of reference)</p>
2.4 Implement <i>reporting systems</i> for reporting results against planned partnership activity outcomes	<p>Reporting systems may relate to:</p> <ul style="list-style-type: none"> contractual requirements (e.g. key performance indicators) internal organisational recording and reporting systems Financial reporting requirements (ROI) OHS incident reporting systems performance agreements record-keeping and report requirements for audit and monitoring purposes.



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BSBLDR812 Develop and cultivate collaborative partnerships and relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Sources, evaluates and critiques ideas and information from a range of <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> • briefings • legislation • Financial reports • organisational policies and procedures reports.
Knowledge Evidence	Notes
<i>Risk management principles</i> related to task requirements	Risk management principles may be: <ul style="list-style-type: none"> • customised • dynamic • focused on continuous improvement, human and culture factors and best available information • inclusive • integrative • structured and comprehensive.
<i>Techniques</i> that cultivate collaborative relationships and partnerships	Techniques may relate to: <ul style="list-style-type: none"> • communication • cultural awareness and recognition • flexible and inclusive work practices • training and development opportunities.
Common <i>data collection methods</i> relevant to performance evidence	Data collection methods may include: <ul style="list-style-type: none"> • focus groups • interviews • internal data sources • surveys (e.g. staff satisfaction).
Assessment Conditions	Notes
Relevant <i>legislation, regulations, standards and codes</i> relevant to establishing partnerships	Legislation may include: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory WHS legislation • Privacy Act 1988. Regulations, standards and codes may relate to: <ul style="list-style-type: none"> • change management and reporting • diversity • equal employment opportunity (EEO) • industry standards.



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BSBLDR812 Develop and cultivate collaborative partnerships and relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
Relevant <i>legislation, regulations, standards and codes</i> relevant to establishing partnerships	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory WHS legislation • Privacy Act 1988. <p>Regulations, standards and codes may relate to:</p> <ul style="list-style-type: none"> • change management and reporting • diversity • equal employment opportunity (EEO) • industry standards.



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BSBLDR813 Lead and influence ethical practice

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Communicate <i>reporting procedures</i> to staff for suspected unethical conduct according to organisational policy	<p>Reporting procedures may relate to:</p> <ul style="list-style-type: none"> following a communications plan professional development and compliance training team meetings.
2.1 Analyse complex ethical matters according to relevant <i>legislation, industry codes of practice and organisational standards</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. <p>Industry codes of practice and organisational standards may relate to:</p> <ul style="list-style-type: none"> change management and reporting equal employment opportunity (EEO) industry standards ethical standards.
2.3 Develop and implement <i>frameworks for ethical decision-making and policy setting</i>	<p>Frameworks for ethical decision-making and policy setting may depend on:</p> <ul style="list-style-type: none"> APES framework Integrity Objectivity Competence Confidentiality Professionalism organisational approach (e.g. fairness or utilitarian).
3.4 Establish a <i>strategy for continuous improvement</i> in ethical conduct for staff	<p>Strategies for continuous improvement may relate to:</p> <ul style="list-style-type: none"> acknowledgement and recognition corporate recognition performance management positive reinforcement training.
Foundation Skills	Notes
Reading: Sources, evaluates and critiques ideas and information from a range of <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> briefings legislation financial reports organisational policies and procedures reports.



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BSBLDR813 Lead and influence ethical practice**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Industry, state, national and international trends in ethical conduct</i>	Industry, state, national and international trends in ethical conduct may relate to: <ul style="list-style-type: none"> • media releases • organisational and industry codes of conduct.
<i>Key features of procedural fairness</i>	Procedural fairness may refer to: <ul style="list-style-type: none"> • integrity • objectivity being used when making administrative decisions.
<i>Procedures, strategies or protocols that can be used to identify and address unethical conduct</i>	Procedures, strategies or protocols may relate to: <ul style="list-style-type: none"> • inclusive practices • organisational and industry codes of conduct.



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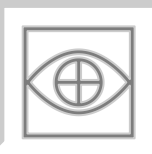
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Legal Services Unit Sector Overview

The Legal Services (LEG) unit sector covers specialist units of competency aimed at building a skills relating to the support function in a legal environment. This includes administrative competencies through to specialist legal skills to support legal practitioners in a law firm setting.

The legal services sector includes roles such as legal administrative assistant, legal secretary, and paralegal. Paralegals carry out a range of tasks, including undertaking legal research, preparing legal documents, supporting solicitors or barristers with client interaction, and various administrative tasks.



Glossary of common terminology

Courts

Courts relate to both state and commonwealth courts, these may include:

- Children's Court
- Coroner's Court
- Courts of Petty Sessions
- District/County Court
- Family Court
- Federal Court
- High Court
- Industrial Relations Court
- Magistrates Court
- Supreme Court.

Organisational policies

Organisational policies represent an overarching course of action adopted by an organisation.

Organisational procedures

Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Legal Services Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Legal Services' unit stream, please refer to the interpretation guidance provided on pages 271 - 296. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBLEG311 Work in a legal services environment**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets <i>textual information</i> to identify correct terms or processes	<p>Textual information may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • legislation • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Knowledge Evidence	Notes
Types of <i>legal documents</i>	<p>Legal documents may include:</p> <ul style="list-style-type: none"> • generic documents (e.g. affidavits, file notes) • specific documents (e.g. property law templates, indictments and bench charge sheets).
<i>Key personnel</i> within a legal practice and their responsibilities.	<p>Key personnel may include:</p> <ul style="list-style-type: none"> • internal personnel (e.g. senior associates, solicitors, support research/library staff) • external personnel (e.g. barrister, court personnel, government departments, settlements clerks, stamp duties office).
Assessment Conditions	Notes
<i>Organisational policies and procedures</i> relevant to staff responsibilities	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • communication (e.g. telephone and email protocols) • document and file access, disposal, storage, formatting, initiation and updating • codes of conduct • general policies (e.g. human resources, work health and safety) • organisational value and mission statements • privacy and confidentiality • security, verification and authorisation of information.
<i>Information on courts</i> , their jurisdiction and behavioural expectation.	<p>Information on courts may relate to:</p> <ul style="list-style-type: none"> • civil courts • criminal courts • court etiquette. <p>Information on courts may differ between states.</p>



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BSBLEG312 Carry out search of the public record

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>information required</i> from search process	Information required may include: <ul style="list-style-type: none"> searches in relation to precedent cases.
1.2 Identify <i>information sources</i> and procedure for obtaining information	Information sources may include: <ul style="list-style-type: none"> internal and online databases state and supreme court libraries privacy guidelines.
3.2 Store required documents according to <i>organisational policies and procedures</i>	Organisational policies and procedures may include recordkeeping policies relating to: <ul style="list-style-type: none"> communication confidentiality disposal document storage formatting security.

Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine job requirements	Textual information may include: <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Writing: Completes a range of <i>forms</i> accurately and legibly using correct technical vocabulary	Forms may include: <ul style="list-style-type: none"> affidavits applications.

Knowledge Evidence	Notes
<i>Standard problems</i> and resolutions in the sourcing and delivery of information	Standard problems may include: <ul style="list-style-type: none"> access to information security and privacy considerations.
Roles and responsibilities of <i>internal and relevant external individuals and authorities</i> .	Internal individuals may include: <ul style="list-style-type: none"> senior associates solicitors support research/library staff. External individuals and authorities may include: <ul style="list-style-type: none"> barrister court personnel government departments settlements clerks stamp duties office.



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BSBLEG312 Carry out search of the public record**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Office equipment and resources</i> required to complete search processes described in the performance evidence	Office equipment and resources may include: <ul style="list-style-type: none"> • access to the internet • digital device.
<i>Legislation and regulations</i> relevant to public record searches	Legislation and regulations may include: <ul style="list-style-type: none"> • Freedom of Information Act 1982.



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BSBLEG313 Lodge documents in a legal services environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Copy and collate documents, where relevant, according to <i>registry requirements</i> and organisational policies and procedures	Registry requirements may include: <ul style="list-style-type: none"> • receipt of funds and proof of payment • lodgment of and receiving documents.
3.2 Store required documents according to <i>organisational policies and procedures</i>	Organisational policies and procedures may include recordkeeping policies relating to: <ul style="list-style-type: none"> • communication • confidentiality • disposal • document storage • formatting • security.
3.4 Advise <i>required personnel</i> of lodgment outcome and report outstanding issues	Required personnel may include: <ul style="list-style-type: none"> • relevant solicitor.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine job requirements	Textual information may include: <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • legislation • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Knowledge Evidence	Notes
Accepted <i>codes of conduct</i> including those relating to: <ul style="list-style-type: none"> • privacy and confidentiality • ethical behaviour • compliance with reasonable direction 	Codes of conduct may relate to: <ul style="list-style-type: none"> • Australian Solicitor Rules • conflict of interest • duty of care • non-discriminatory practice.
Relevant <i>court processes</i> , current legislation, legal processes and required documentation	Court processes may include: <ul style="list-style-type: none"> • civil and criminal court processes • mediation of cases.



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BSBLEG314 Protect information in a legal services environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services BSB40620 Certificate IV in Legal Services	N/A
Skill sets	BSBSS00106 Introduction to Paralegal Services Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify personal role and <i>responsibilities in relation to communication with relevant parties</i>	<p>Responsibilities in relation to communication with relevant parties may include:</p> <ul style="list-style-type: none"> keeping contemporaneous notes non-disclosable information recording all communications.
1.4 Follow <i>organisational procedures</i> for receipting payments	<p>Organisational procedures may include:</p> <ul style="list-style-type: none"> auditing and inspections keeping contemporaneous notes trust funds and how the money comes in to the law firm.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine and to adhere to organisational practice	<p>Textual information may include:</p> <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Technology: Uses <i>digital systems</i> and tools to access and store information, understanding the need for security of all data	<p>Digital systems may include:</p> <ul style="list-style-type: none"> cloud-based technology online databases or locally created databases timekeeping systems. <p>There are guidelines in relation to digital tools - under Uniform Civil Procedures Rules.</p>
Performance Evidence	Notes
Identify and apply standard resolutions to <i>breaches</i> of confidentiality, security and conduct by self and others within the firm	<p>Breaches may include:</p> <ul style="list-style-type: none"> privacy principles (e.g. discussing a matter outside of workplace).
Seek advice from <i>appropriate sources</i> where the level of confidentiality required in a situation is unclear	<p>Appropriate sources may include:</p> <ul style="list-style-type: none"> partner / solicitor managing relevant account.
Knowledge Evidence	Notes
Relevant <i>court processes</i> , current legislation, legal processes and required documentation	<p>Court processes may include:</p> <ul style="list-style-type: none"> civil and criminal court processes mediation of cases.
Assessment Conditions	Notes
<i>Office equipment and resources</i> for confidentiality and security processes	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> digital device internet access.



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BSBLEG315 Assist in planning activities in a legal services environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Establish and clarify priorities of <i>designated personnel</i>	<p>Designated personnel may include:</p> <ul style="list-style-type: none"> • relevant solicitor • relevant partner.
4.2 Update file notes according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • auditing and inspections • keeping contemporaneous notes • recordkeeping including: <ul style="list-style-type: none"> ○ communication ○ confidentiality ○ disposal ○ document storage ○ formatting ○ Security • trust funds and how the money comes in to the law firm.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual data</i> to identify and plan job deadlines to adhere to requirements	<p>Textual data may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • legislation • time-recording • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Teamwork: Selects appropriate <i>mode of communication</i> for a specific purpose relevant to own role	<p>Mode of communication may include:</p> <ul style="list-style-type: none"> • emailing • internal messaging systems • telephone calls • virtual meeting technology. <p>Modes of communication may need to be selected based on needs for discrete communication.</p>
Knowledge Evidence	Notes
<i>Codes of conduct</i> relevant to planning activities in a legal services environment	<p>Codes of conduct may include:</p> <ul style="list-style-type: none"> • Australian Solicitor Rules • compliance with reasonable direction • conflict of interest • duty of care • ethical behaviour • non-discriminatory practice. • privacy and confidentiality.



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BSBLEG315 Assist in planning activities in a legal services environment**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Office equipment and resources for scheduling activities</i>	Office equipment and resources may include: <ul style="list-style-type: none"> • digital device • internet access.



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BSBLEG421 Apply understanding of the Australian legal system**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40620 Certificate IV in Legal Services BSB50720 Diploma of Paralegal Services	BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB40320 Certificate IV in Entrepreneurship and New Business BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>sources of Australian law</i>	Sources of Australian law may include: <ul style="list-style-type: none"> • case law • custom law • influences from international instruments • statute.
1.3 Access sources of legislation according to <i>organisational policies and procedures</i>	Organisational policies and procedures may include: <ul style="list-style-type: none"> • auditing and inspections • keeping contemporaneous notes • recordkeeping including: <ul style="list-style-type: none"> ○ communication ○ confidentiality ○ disposal ○ document storage ○ formatting ○ security • trust funds and how the money comes in to the law firm.
1.4 Apply <i>principles</i> for reading and interpreting legislation	Principles may be found in: <ul style="list-style-type: none"> • Acts Interpretation Act 1901.
Assessment Conditions	Notes
<i>Office equipment and resources</i> for fulfilling performance criteria	Office equipment and resources may include: <ul style="list-style-type: none"> • digital device • internet access.



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BSBLEG422 Maintain a file in a legal services environment**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50720 Diploma of Paralegal Services	BSB40620 Certificate IV in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Obtain details of the legal matter from the client according to instructions and <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> client contact establishing potential conflicts informing necessary stakeholders taking contemporaneous notes.
2.4 Plan work in conjunction with <i>designated individual</i> and allocate resources	Designated individual may include: <ul style="list-style-type: none"> legal practice managers legal practitioners supervisors / direct reports.
4.1 Maintain <i>information flow</i> to relevant parties on progress of matter	Information flow may include: <ul style="list-style-type: none"> progress reports sent to clients.
5.2 Arrange meeting with <i>relevant personnel</i> to review final relevant documentation in order to facilitate sign-off before forwarding to client	Relevant personnel may include: <ul style="list-style-type: none"> legal practice managers legal practitioners supervisors / direct reports.
Foundation Skills	Notes
Technology: Uses familiar <i>digital technologies</i> and systems to access information, enter and store data, present information and communicate with others	Digital technologies may include: <ul style="list-style-type: none"> cloud-based technology online databases or locally created databases timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Knowledge Evidence	Notes
Relevant legal processes and <i>required documentation</i>	Required documentation may include: <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation.



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BSBLEG423 Conduct simple legal research**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40620 Certificate IV in Legal Services	BSB30320 Certificate III in Legal Services
Skill sets	BSBSS00106 Introduction to Paralegal Services Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Document request using appropriate <i>recording system</i>	<p>Recording system may include:</p> <ul style="list-style-type: none"> file note logging a request.
1.5 Forward request for information to <i>others</i> where appropriate	<p>Others may include:</p> <ul style="list-style-type: none"> legal practice managers legal practitioners supervisors / direct reports.
2.1 Identify relevant <i>sources and locations of information</i> according to organisational and task requirements	<p>Sources and locations of information may include:</p> <ul style="list-style-type: none"> internal and online databases government websites (e.g. Fair Work site) state and supreme court libraries Austlii. <p>Sources may depend on legal context.</p>
Foundation Skills	Notes
Reading: Identifies information from a <i>range of texts</i> to determine the procedures and strategies needed to perform a range of tasks	<p>Range of texts may include:</p> <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Writing: Creates required records according to <i>organisational recording procedures</i> and systems	<p>Organisational recording procedures may include:</p> <ul style="list-style-type: none"> communications confidentiality disposal document storage formatting security.
Technology: Uses the main features and functions of <i>digital technologies</i> and tools to complete work tasks	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> cloud-based technology online databases or locally created databases timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Assessment Conditions	Notes
<i>Office equipment and resources</i> for conducting simple legal research	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> digital device internet access.



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BSBLEG424 Support the drafting of complex legal documents**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40620 Certificate IV in Legal Services	N/A
Skill sets	BSBSS00106 Introduction to Paralegal Services Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Select <i>software</i> according to task requirements	Software may include: <ul style="list-style-type: none"> cloud applications internal organisational systems and software word processing.
2.1 Develop and use <i>precedents</i> to ensure consistency of design and layout	Precedents may include: <ul style="list-style-type: none"> packaged templates (e.g. LexisNexis).
2.3 Recommend improvements to <i>relevant personnel</i> for design and structure of existing documents	Relevant personnel may include: <ul style="list-style-type: none"> legal practice managers partners solicitors supervisors / direct report.
4.2 Arrange review of documents with <i>designated person</i>	Designated person may include those covered under 'relevant personnel'.
4.4 Save and store document according to <i>organisational procedures</i>	Organisational procedures may include: <ul style="list-style-type: none"> confidentiality disposal security.
Foundation Skills	Notes
Reading: Investigates and interprets a <i>variety of texts</i> to determine and adhere to requirements	Variety of texts may include: <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Technology: Uses <i>digital applications</i> to access, extract, organise, integrate and share relevant information	Digital applications may include: <ul style="list-style-type: none"> cloud-based technology online databases or locally created databases timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>



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BSBLEG425 Apply principles of legal project management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>project resources</i>	<p>Project resources may include:</p> <ul style="list-style-type: none"> • costs • human capital • licenses to websites • precedent templates • research resources • timelines and deadlines.
1.4 Confirm deliverable with management according to <i>organisational policy</i>	<p>Organisational policy may include:</p> <ul style="list-style-type: none"> • cost policies • time policies (due to statutory deadlines).
3.1 Seek feedback from <i>relevant stakeholders</i> on project management processes to inform lessons learned	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • legal practice managers • partners • solicitors • supervisors / direct report.
Foundation Skills	Notes
Writing: Develops a <i>range of documents</i> using structure and vocabulary appropriate to audience, context and purpose	<p>Range of documents may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • legislation • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Technology: Uses familiar <i>digital technologies</i> and systems to access information, prepare information and support projects	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> • cloud-based technology • spreadsheets • online databases or locally created databases • proprietary project management tools • timekeeping systems • word processing tools. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Knowledge Evidence	Notes
<i>Methods to obtain feedback</i> for identifying lessons learned from relevant personnel	<p>Methods to obtain feedback may include:</p> <ul style="list-style-type: none"> • external methods (e.g. consultation with client) • internal methods (e.g. meeting with solicitor).



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BSBLEG521 Conduct and apply legal research

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50720 Diploma of Paralegal Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Identify <i>sources</i> of legal data and information	<p>Sources and locations of information may include:</p> <ul style="list-style-type: none"> • internal and online databases • government websites (e.g. Fair Work site) • state and supreme court libraries • Austlii. <p>Sources may depend on the legal context.</p>
4.1 Draft document in appropriate format according to task and <i>organisational requirements</i>	<p>Organisational requirements may include:</p> <ul style="list-style-type: none"> • confidentiality • disposal • document storage • formatting • security.
Foundation Skills	Notes
Reading: Identifies and analyses <i>complex texts</i> to assess relevance to research task	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • legislation • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • cloud-based technology • spreadsheets • online databases or locally created databases • timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Performance Evidence	Notes
Consult with <i>relevant stakeholders</i> to prepare a research plan	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • legal practice managers • partners • solicitors • supervisors / direct reports.



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BSBLEG522 Apply legal principles in contract law matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60220 Advanced Diploma of Conveyancing	BSB40620 Certificate IV in Legal Services BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00115 Copyright Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>type of contract</i>	Types of contract may include: <ul style="list-style-type: none"> formal contract simple contract.
1.3 Research <i>key elements of contract</i>	Key elements of contract may include: <ul style="list-style-type: none"> offer acceptance intention to create a legal relationship consideration.
2.2 Evaluate <i>key issues arising from contractual issue</i>	Key issues arising from contractual issue may include: <ul style="list-style-type: none"> breaches of contract contract validity negligence.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex text</i> to clarify contractual definitions, principles and legal requirements	Complex texts may include: <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures legislation statutory interpretations.
Knowledge Evidence	Notes
<i>Procedures</i> for discharge of contracts including for a workplace legal matter	Procedures may include: <ul style="list-style-type: none"> statutory-based procedures employment terms in contracts.
Assessment Conditions	Notes
<i>Legislation and regulations</i> relevant to contract law	Legislation and regulations may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 state-based legislation and regulations.
<i>Sources of information</i> about contract law	Sources of information may include: <ul style="list-style-type: none"> common law state and commonwealth legislation.



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BSBLEG523 Apply legal principles in tort law matters

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40620 Certificate IV in Legal Services BSB50720 Diploma of Paralegal Services BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify key <i>tort law elements</i> for analysis according to task requirements	Tort law elements may include: <ul style="list-style-type: none"> breach of duty of care causation and damage duty of care owed principle in agent types of torts <ul style="list-style-type: none"> deliberate (conversions) unintentional (negligence) vicarious liability.
1.3 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	Legislation may include: <ul style="list-style-type: none"> state-based legislation (e.g. Civil Liability Acts).
3.2 Submit findings to <i>designated person</i> according to organisational policies and procedures	Designated person may include: <ul style="list-style-type: none"> colleagues legal practice managers partners solicitors supervisors / direct reports.
Foundation Skills	Notes
Reading: Identifies, reviews and interprets <i>complex legal text</i> from a range of sources and determines how content may be applied in application of torts law	Complex legal text may include: <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures judgements legislation statutory interpretations.
Assessment Conditions	Notes
Sources of information on tort law	Locations of information may include: <ul style="list-style-type: none"> common law commonwealth and state legislation sites Austlii.



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BSBLEG524 Apply principles of evidence law in matters under litigation**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40620 Certificate IV in Legal Services BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access <i>sources of legal information</i> on nature and meaning of evidence law	<p>Sources of legal information may include:</p> <ul style="list-style-type: none"> • LexisNexis • state-based evidence legislation • Westlaw.
Foundation Skills	Notes
Reading: Identifies, reviews and interprets <i>complex legal text</i> from a range of sources and determines how content may be applied in the application of evidence law	<p>Complex legal text may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • judgements • legislation • statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>



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BSBLEG525 Apply legal principles in intellectual property law matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>key principles of intellectual property law</i> according to task requirements	<p>Key principles of intellectual property law may relate to:</p> <ul style="list-style-type: none"> different intellectual property rights, registrations and legislation, such as those relating to: <ul style="list-style-type: none"> ○ circuit layouts ○ copyright protection ○ design protection ○ patent protection ○ plant breeder's rights ○ trade mark protection ○ trade secrets.
<p>Foundation Skills</p> <p>Reading: Researches and analyses <i>complex texts</i>, including legislation, to identify relevant information</p>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Copyright Act 1968 • Designs Act 2003 • Designs Regulations 2004 • intellectual property agreements or licences registers • Intellectual Property Laws Amendment Act 2015 • Patents Act 1990 • Patents Regulations 1991 • Plant Breeder's Rights Act 1994 • Plant Breeder's Rights Regulations 1994 • non-legislative instruments • Trade Marks Act 1995 • Trade Marks Regulations 1995
<p>Technology: Uses <i>digital technologies</i> or tools to access and record information</p>	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> • cloud-based technology • spreadsheets • online databases or locally created databases • timekeeping systems.
<p>Knowledge Evidence</p> <p><i>Sources of information</i> and advice on copyright</p>	<p>Sources of information may include:</p> <ul style="list-style-type: none"> • Attorney-General's Department • Australian Copyright Council • IP Australia • State and Commonwealth government agencies.



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BSBLEG526 Apply legal principles in criminal law matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	<p>Legislation may include:</p> <ul style="list-style-type: none"> • government regulations and policies relating to criminal law matters • relevant commonwealth, state or territory legislation • state-based criminal codes.
3.3 Despatch document according to <i>organisational requirements</i>	<p>Organisational requirements may include:</p> <ul style="list-style-type: none"> • confidentiality • disposal • document storage • security.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>complex textual information</i> from a range of sources and identifies relevant and key information	<p>Complex textual information may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • judgements • legislation • statutory interpretations.
Assessment Conditions	Notes
<i>Workplace policies and procedures</i> and reference materials relevant to performance evidence	<p>Workplace policies and procedures may relate to:</p> <ul style="list-style-type: none"> • engaging barristers and experts • individual procedures adopted by instructing legal practitioners • accommodating specific client needs • contacting clients • recording information • security, confidentiality and privacy procedures • verifying and authorising information.



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BSBLEG527 Apply legal principles in family law matters

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Marriage Act 1961 • Family Law Act 1975.
3.1 Review deliverable with <i>relevant organisational personnel</i>	<p>Relevant organisational personnel may include:</p> <ul style="list-style-type: none"> • colleagues • legal practice managers • paralegals • partners • solicitors • supervisors / direct report.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>complex textual</i> information from a range of sources and identifies relevant and key information	<p>Complex textual information may include:</p> <ul style="list-style-type: none"> • court documents • instructions and organisational policies and procedures • judgements • legislation • statutory interpretations.
Knowledge Evidence	Notes
<i>Documentation</i> required in family law matters	<p>Documentation may include:</p> <ul style="list-style-type: none"> • affidavits • certificates (e.g. marriage or counselling certificates) • financial documentation and statements (e.g. bank statements, school fees, salary documents) • land title and mortgage documents • marriage and separations brochure • tax returns.
Assessment Conditions	Notes
Background <i>information on courts, their jurisdiction and behavioural requirements</i>	<p>Information on courts, their jurisdiction and behavioural requirements may include:</p> <ul style="list-style-type: none"> • state court websites (e.g. State) • state jurisdiction (e.g. adoption and surrogacy).
<i>Workplace resources</i> to fulfil performance criteria	<p>Workplace resources may include:</p> <ul style="list-style-type: none"> • digital device • internet access.



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BSBLEG528 Apply legal principles in property law matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	Legislation may include: <ul style="list-style-type: none"> state-based legislation (e.g. Real Property Act, Conveyancing Act NSW).
2.1 Obtain <i>relevant documents</i> from authorities and service providers with supervision	Relevant documents may include: <ul style="list-style-type: none"> planning certificates title registries.
Foundation Skills	Notes
Reading: Checks <i>documents</i> for accuracy and consistency of information	Documents may include: <ul style="list-style-type: none"> contracts (e.g. contracts for sale, mortgage contracts)
Technology: Uses familiar <i>digital technologies</i> and systems to access and present information	Digital technologies may include: <ul style="list-style-type: none"> cloud-based technology spreadsheets online databases or locally created databases proprietary software (e.g. Leap, PEXA, Smokeball) timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Performance Evidence	Notes
Apply property law principles in at least four different <i>matters</i>	Matters may include: <ul style="list-style-type: none"> lodging a caveat requisitions special conditions for sale and purchase.
Assessment Conditions	Notes
Background <i>information on courts</i> , their jurisdiction and behavioural requirements	Information on courts may include: <ul style="list-style-type: none"> county courts Commonwealth and state Courts district courts local courts magistrates courts.



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BSBLEG529 Apply legal principles in corporation law matters

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50720 Diploma of Paralegal Services BSB60220 Advanced Diploma of Conveyancing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Verify and review documentation with <i>relevant organisational personnel</i>	Relevant organisational personnel may include: <ul style="list-style-type: none"> • practice manager • relevant solicitor • relevant partner • supervisor.
Foundation Skills	Notes
Initiative and enterprise: Identifies implications of law to <i>organisational policies and procedures</i>	Organisational policies and procedures may include: <ul style="list-style-type: none"> • engaging barristers and experts • individual procedures adopted by instructing legal practitioners • accommodating specific client needs • contacting clients • recording information • security, confidentiality and privacy procedures • verifying and authorising information.
Knowledge Evidence	Notes
<i>Documentation</i> required in corporation law matters	Documents may include: <ul style="list-style-type: none"> • certificate of incorporation • certificate of title • forms and documents related to the administration of charges • relevant notifications and applications.
Assessment Conditions	Notes
Appropriate <i>legislation and regulations</i> relevant to corporation law and common legal matters	Legislation and regulations may include: <ul style="list-style-type: none"> • Australian Taxation Office regulations • Commonwealth corporation law • relevant state and territory corporation law • schedules of fees and duties payable • taxation and banking requirements • tort, equity and statute law • trust accounts.



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BSBLEG530 Apply legal principles in wills and probate matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	Legislation may include: <ul style="list-style-type: none"> state-based legislation (e.g. Real Property Act, Conveyancing Act NSW, Administration and Probate Act 1958 VIC).
3.1 Verify and review documentation with <i>relevant organisational personnel</i>	Relevant organisational personnel may include: <ul style="list-style-type: none"> relevant solicitor colleagues legal practice managers paralegals partners solicitors supervisors / direct report.
3.3 <i>Store or despatch document</i> according to task and organisational requirements	Store or despatch document may include: <ul style="list-style-type: none"> confidentiality disposal document storage formatting security supreme court storage.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>complex textual information</i> from a range of sources and identifies relevant and key information	Complex textual information may include: <ul style="list-style-type: none"> Application for Probate court documents instructions and organisational policies and procedures judgements legislation statutory interpretations Wills.
Knowledge Evidence	Notes
<i>Sources of instructions</i> including testamentary, solicitor and deceased estate	Sources of instructions may also include: <ul style="list-style-type: none"> clients instructions.



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BSBLEG531 Apply legal principles in administrative law matters**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify key provisions of <i>legislation</i> and common law, policies or procedures according to task requirements	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Acts Interpretation Act 1901 • Legislation Act 2003 • Legislation (Exemptions and Other Matters) Regulation 2015 • Legislation (General) Regulation 2015 • state-based legislation
3.3 <i>Store or despatch document</i> according to task and organisational requirements	<p>Store or despatch document may include:</p> <ul style="list-style-type: none"> • confidentiality • disposal • document storage • formatting • security • supreme court storage.
Knowledge Evidence	Notes
<i>Bodies of review for administrative decisions</i> and their processes	<p>Bodies of review for administrative decisions may relate to:</p> <ul style="list-style-type: none"> • Administrative Review Council • judicial review • merits review of primary decisions (Merit Protection Commissioner) • Office of the Australian Information Commissioner • parliamentary committees • primary decision making • The Attorney-General • The Commonwealth Ombudsman.
Assessment Conditions	Notes
<i>Workplace policies and procedures and reference materials</i> relevant to performance evidence	<p>Workplace policies and procedures may include:</p> <ul style="list-style-type: none"> • accommodating specific client needs • contacting clients • engaging barristers and experts • individual procedures adopted by instructing legal practitioners • recording information • security, confidentiality and privacy procedures • verifying and authorising information.



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BSBLEG532 Assist with court procedure**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Prepare relevant costing documents	<p>Prepare may include:</p> <ul style="list-style-type: none"> typing up/creating the document according to instructions of solicitor. <p>Costing documents may include:</p> <ul style="list-style-type: none"> disclosure statements engagement letters.
2.2 Obtain and prepare relevant documentation for <i>designated person</i> according to policies and procedures of the firm	<p>Designated personnel may include:</p> <ul style="list-style-type: none"> barristers legal practice managers paralegals partners solicitors supervisors / direct report.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>complex textual information</i> from a range of sources and identifies relevant and key information	<p>Complex textual information may include:</p> <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures judgements legislation statutory interpretations.
Performance Evidence	Notes
Obtain and prepare accurate, compliant and complete litigation documents according to <i>legislative</i> and organisational requirements	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> state-based legislative requirements (e.g. Uniform Civil Procedure Rules 2005 [NSW], Uniform Civil Procedure Rules 1999 [QLD])
Assessment Conditions	Notes
<i>Workplace policies and procedures</i> and reference materials relevant to performance evidence	<p>Workplace policies and procedures may include:</p> <ul style="list-style-type: none"> accommodating specific client needs contacting clients engaging barristers and experts individual procedures adopted by instructing legal practitioners recording information security, confidentiality and privacy procedures verifying and authorising information.



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BSBLEG533 Support alternative dispute resolution processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50720 Diploma of Paralegal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 <i>Develop</i> notes of mediation or arbitration proceedings according to task and organisational requirements	<p>Develop may include:</p> <ul style="list-style-type: none"> take notes or prepare notes for mediation or arbitration (e.g. for a solicitor).
2.3 Collate additional information or documents for final documentation	<p>Additional information may include:</p> <ul style="list-style-type: none"> client details for application for consent orders.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine job requirements	<p>Complex textual information may include:</p> <ul style="list-style-type: none"> court documents instructions and organisational policies and procedures judgements legislation position statutory interpretations. <p>Dependent on the legal context: e.g. Family law, Criminal law, Property law, Civil procedure.</p>
Technology: Uses familiar <i>digital technologies</i> and systems to access information, and enter and store data	<p>Digital technologies may include:</p> <ul style="list-style-type: none"> cloud-based technology spreadsheets online databases or locally created databases proprietary software timekeeping systems. <p>There are guidelines in relation to digital tools - under state based Civil Procedures Rules.</p>
Performance Evidence	Notes
Support <i>alternative dispute resolution processes</i> on at least three occasions, including at least one mediation and at least one arbitration	<p>Alternative dispute resolution processes may include:</p> <ul style="list-style-type: none"> arbitration expert determination mediation.



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BSBLEG534 Take instructions in a legal services environment**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50720 Diploma of Paralegal Services	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Gather information using <i>questioning techniques</i> according to task and <i>legislative requirements</i>	<p>Questioning techniques may include:</p> <ul style="list-style-type: none"> collecting information about matter. <p>Legislative requirements may include:</p> <ul style="list-style-type: none"> state-based Legal Profession Uniform Law (e.g. Section 10 of the Legal Profession Uniform Law [Victoria]).
3.3 <i>Document</i> and store information according to task requirements and organisational policies and procedures	<p>Document may include:</p> <ul style="list-style-type: none"> file notes time sheets.
Knowledge Evidence	Notes
Common <i>client instruction process</i> and techniques	<p>Client instruction process may relate to:</p> <ul style="list-style-type: none"> client meetings client telephone calls information collection (in appropriate detail and without providing advice) emails website queries.
<i>Organisational policies and procedures</i> for taking instruction including follow-up processes	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> confidentiality privacy.
Assessment Conditions	Notes
<i>Legislation</i> relevant to taking instruction in a legal environment	<p>Legislation may include:</p> <ul style="list-style-type: none"> state-based Legal Profession Acts state-based Legal Profession Uniform Law Verification of Identity (VOI).



Medical Administration

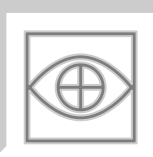
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BSBMED301	Interpret and apply medical terminology appropriately	308
BSBMED302	Prepare and process medical accounts	310
BSBMED303	Maintain patient records	312
BSBMED304	Assist in controlling stocks and supplies	314
BSBMED305	Apply the principles of confidentiality, privacy and security within the medical environment	317
BSBMED401	Manage patient recordkeeping system	319



Medical Administration Unit Sector Overview

The Medical Administration (MED) unit sector incorporates specialist units of competency aimed at supporting and managing the administration of a medical organisation or practice.

Relevant job roles may include medical administrative assistant, medical receptionist, medical administrative officer.



Glossary of common terminology

Enterprise	Enterprise refers to 'organisation' or 'organisational'.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Protocols	Protocols outline explicit and specific plans that specify procedures to be followed in defined situations.

Medical Administration Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Medical Administration' unit stream, please refer to the interpretation guidance provided on pages 299 - 309. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBMED301 Interpret and apply medical terminology appropriately

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Receive, interpret and document written and oral <i>instructions</i> using medical terminology	<p>Instructions may include:</p> <ul style="list-style-type: none"> • fact sheets • health professionals notes • patient files • reports • transcripts.
1.2 Use <i>checklists</i> where appropriate	<p>Checklists may include:</p> <ul style="list-style-type: none"> • 8 point checklists • client communication checklists • infection control checklists • triage checklists • work health and safety (WHS) checklists.
1.4 Interpret and adhere to the <i>policies and procedures</i> of the workplace	<p>Policies and procedures may relate to:</p> <ul style="list-style-type: none"> • client communication • confidentiality • file management • organisational templates • privacy • storage, security and access • training practice manuals.
2.1 Use medical terminology correctly in the completion of <i>routine tasks</i>	<p>Routine tasks may include:</p> <ul style="list-style-type: none"> • cold chain training • collating and documenting information on patient files • communicating with patients and practice managers • completing purchase orders • labelling and maintaining equipment • reading transcripts and patient files • rotating stock • typing reports and recording presentations.
3.3 Present written communication to a <i>designated person</i> for verification if required	<p>Designated person may include:</p> <ul style="list-style-type: none"> • experienced work colleagues • health professional (e.g. practice managers, doctors, nurses, ward clerks, physiotherapists) • supervisors.



Overview

Level 3

Level 4

BSBMED301 Interpret and apply medical terminology appropriately

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets technical language within various <i>texts</i>	<p>Texts may include:</p> <ul style="list-style-type: none"> • medical terminology directories • organisational policies and procedures • patient files • training practice manuals.
Writing: Uses clear, specific and industry related terminology to complete and update workplace <i>documentation</i>	<p>Documentation may include:</p> <ul style="list-style-type: none"> • patient files • patient notifications (e.g. front desk, public health) • reports.
Navigate the world of work: Understands and operates within <i>organisational procedures and policies</i>	<p>Organisational procedures and policies may include:</p> <ul style="list-style-type: none"> • accreditation • organisational and industry codes of conduct • government directives • WHS.
Interact with others: Selects the appropriate <i>form, channel and mode of communication</i> for a specific purpose relevant to own role	<p>Forms, channels and modes of communication may include:</p> <ul style="list-style-type: none"> • oral (e.g. in-person communication, following organisational reporting line) • written (e.g. using digital technologies).
Performance Evidence	Notes
Identify and use appropriate abbreviations for medical terms and associated <i>processes</i>	<p>Processes may relate to:</p> <ul style="list-style-type: none"> • appointment requests • hospital admission papers • prescriptions • medical record-keeping • test requests. <p>Processes may depend on specialty and should follow the Australian abbreviation list and organisational standard practice.</p>
Knowledge Evidence	Notes
Identify <i>sources of information</i> available to check on medical terminology	<p>Sources of information may include:</p> <ul style="list-style-type: none"> • medical abbreviation lists • medical dictionaries and thesauruses • relevant government agencies (e.g. The Department of Health). <p>Sources should be verifiable.</p>
Assessment Conditions	Notes
<i>Office equipment and resources</i>	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> • digital resources and technologies (e.g. fax, internet) • organisational applications (e.g. billing, medical or note applications) • organisational policies and procedures • storage access.



BSBMED302 Prepare and process medical accounts

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Schedule medical appointments using appropriate <i>booking and account systems</i>	<p>Booking and account systems may include:</p> <ul style="list-style-type: none"> • appointment books • digital calendars, diaries and applications • practice management and scheduling software (e.g. PracSoft, Helix, MedicalDirector). <p>Appropriate booking and account systems may depend on the organisation.</p>
2.2 Follow <i>correct procedures</i> for referral	<p>Correct procedures may include:</p> <ul style="list-style-type: none"> • dating and signing documents • documenting current patient information needs • following the chain of command • storage and retention • referring and requesting medicare services. <p>Procedures should comply with relevant legislation, organisational policies and procedures and encompass legislative requirements.</p>
2.3 File referral letters according to <i>legislation</i> and workplace policies and procedures	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
3.1 Accurately follow <i>procedures</i> for billing based on account type	<p>Procedures should comply with relevant legislation, organisational policies and procedures and encompass legislative requirements.</p>
3.3 Select and complete appropriate <i>account and billing documentation</i> according to workplace and <i>legislative requirements</i>	<p>Account and billing documentation may include:</p> <ul style="list-style-type: none"> • organisational templates according to organisational policies and procedures (e.g. medicare, invoicing, end of day reports, matching records). <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • archiving and disposal • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • document and file management • local, state and territory WHS legislation • Privacy Act 1988 • storage, security and access.



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Level 3

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BSBMED302 Prepare and process medical accounts

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.4 Follow <i>procedures</i> for preparing Veterans' Affairs, workers' compensation and motor vehicle third party accounts accurately	Procedures should comply with relevant legislation, organisational policies and procedures and encompass legislative requirements.
3.5 Forward medical account to <i>designated person</i> or organisation according to legislation and account processing procedure	<p>Designated person may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. insurers, auditors, legal representatives, other healthcare providers) internal stakeholders (e.g. practice managers, doctors, nurses, senior office managers). <p>Designated person may depend on the organisation.</p>
Foundation Skills	Notes
Get the work done: Uses <i>digitally based systems and technologies</i> to access, organise and present information	<p>Digitally based systems and technologies may include:</p> <ul style="list-style-type: none"> point of sale machine (e.g. EFTPOS, HICAPS, TYRO) practice management and scheduling software (e.g. PracSoft, Helix, MedicalDirector).
Knowledge Evidence	Notes
Outline public and private health <i>insurance systems</i>	<p>Insurance systems may include:</p> <ul style="list-style-type: none"> Medicare private health organisations (https://www.privatehealth.gov.au/) third party compensation Veterans' Affairs workers' compensation.
Discuss key aspects of relevant <i>legislation, regulations, standards and codes of practice</i> that affect workplace operations	<p>Legislation, regulations, standards and codes of practice may include:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory WHS legislation Privacy Act 1988.
Assessment Conditions	Notes
<i>Office equipment and resources</i>	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> digital resources and technologies (e.g. fax, internet) organisational applications (e.g. billing, medical or note applications) organisational policies and procedures simulated work environment storage access.
Examples of <i>documentation</i>	<p>Documentation may include:</p> <ul style="list-style-type: none"> accounts Medicare and Veterans' Affairs templates referrals.



BSBMED303 Maintain patient records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine own role and <i>responsibilities</i> within patient recordkeeping system through consultation with <i>relevant personnel</i> or via organisational policy and procedures manual	<p>Responsibilities may include:</p> <ul style="list-style-type: none"> • authority to access • patient file management. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • practice managers • supervisors. <p>Responsibilities are outlined in relevant job description and training practice manual.</p>
1.2 Access <i>documented procedures</i> for patient recordkeeping system and read for understanding	<p>Documented procedures should comply with relevant legislation, organisational policies and procedures and encompass legislative requirements.</p>
2.3 Create new records according to <i>enterprise protocols</i>	<p>Enterprise protocols may relate to:</p> <ul style="list-style-type: none"> • finalising records • identification documents required to enter a new patient • transferring records from one practice to another. <p>Enterprise protocols may depend on the organisation.</p>
2.5 Store patient records according to <i>organisational policy and procedures</i>	<p>Organisational policy and procedures should to comply with relevant legislation and encompass legislative requirements.</p>
4.1 <i>Monitor and review</i> own role and responsibilities in maintaining patient records to identify opportunities for <i>improvements</i> to system and own work practices	<p>Monitoring and reviewing may relate to:</p> <ul style="list-style-type: none"> • performance reviews • understanding job description and role. <p>Improvements may include:</p> <ul style="list-style-type: none"> • colour coding • developing checklists • ensuring systems are backed up • instructions to support system use • other coding practices. <p>Improvements may refer to work practices within the system, rather than to the system itself.</p>
4.2 Make recommendations to relevant personnel for improvements to the established <i>procedures and processes</i> for maintaining patient records	<p>Procedures and processes should comply with relevant legislation, organisational policies and procedures and encompass legislative requirements.</p>



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BSBMED303 Maintain patient records

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Navigate the world of work: Identifies and works within own roles and responsibilities according to organisational and <i>legislative requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • archiving and disposal • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • document and file management • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988 • storage, security and access.
Interact with others: Uses appropriate <i>practices and protocols</i> for workplace communication	<p>Practices and protocols may include:</p> <ul style="list-style-type: none"> • following organisational verbal and written communication procedures and chain of command • using digital technologies (e.g. internal messaging systems, external social media platforms, surveys, text messages, emails).
Performance Evidence	Notes
Communicate with <i>relevant people</i> about patient records.	<p>Relevant people may include:</p> <ul style="list-style-type: none"> • health professionals (e.g. practice managers, doctors, specialists).
Knowledge Evidence	Notes
Outline relevant <i>legislation, standards and/or codes of practice</i> that affect patient recordkeeping	<p>Legislation, standards and/or codes of practice may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • local, state and territory WHS legislation • Privacy Act 1988.
Assessment Conditions	Notes
<i>Office equipment and resources</i>	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> • digital resources and technologies (e.g. fax, internet) • organisational applications (e.g. billing, medical or note applications) • organisational policies and procedures • simulated work environment • storage access.



Overview

Level 3

Level 4

BSBMED304 Assist in controlling stocks and supplies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine own <i>role</i> in stock control processes by consulting with manager or supervisor	<p>Role may include:</p> <ul style="list-style-type: none"> ordering, storing, rotating and disposing of stock. <p>Role may depend on the organisation and is defined in job description according to legislative requirements.</p>
1.2 Access <i>documented procedures</i> for stock control and read for understanding	<p>Documented procedures may relate to:</p> <ul style="list-style-type: none"> stock management stocktake storage, security and access. <p>Documented procedures may depend on the organisation and relevant job description. Legislative requirements should be adhered to.</p>
1.3 Seek clarification with <i>relevant personnel</i> of unclear or <i>ambiguous procedures</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. suppliers) internal personnel (e.g. practice managers, supervisors, doctors, nurses). <p>Ambiguous procedures may include:</p> <ul style="list-style-type: none"> conflicting procedures (e.g. differences between purchase order and delivery docket).
2.4 Check orders against enterprise documentation and take <i>appropriate actions</i> where any shortfall is identified	<p>Appropriate actions may include:</p> <ul style="list-style-type: none"> notifying suppliers organising credits or refunds referring to actions on respective invoice. <p>Appropriate actions should be documented in organisational policies and procedures.</p>
4.3 Assist with other <i>stocktaking actions</i> as directed	<p>Stocktaking actions may include:</p> <ul style="list-style-type: none"> creating and completing checklists for expiry. <p>Stocktaking actions may depend on the organisation and relevant job description, and should be documented in organisational policy and procedure manuals.</p>



Overview

Level 3

Level 4

BSBMED304 Assist in controlling stocks and supplies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
5.1 Dispose of stock marked for disposal according to <i>legislation</i> and other <i>industry specific or manufacturer requirements</i> and under direction of supervisor	<p>Legislation may include:</p> <ul style="list-style-type: none"> state environmental protection authorities (EPA) infection control standards and guidelines local, state and territory work health and safety (WHS) legislation Privacy Act 1988 Therapeutic Goods Act 1989. <p>Industry specific or manufacturer requirements may include:</p> <ul style="list-style-type: none"> practice manuals safety data sheets.
Foundation Skills	Notes
Numeracy: Identifies and understands relevant <i>mathematical information</i> while monitoring stock levels, ordering stock and determining out-of-date stock	<p>Mathematical information may include:</p> <ul style="list-style-type: none"> counting stock keeping inventory records and stock cards rotations of stock.
Navigate the world of work: Recognises and adheres to <i>organisational policies and procedures</i> and legislative requirements	<p>Organisational policies and procedures should comply with relevant legislation and encompass legislative requirements.</p>
Get the work done: Uses problem-solving skills to analyse <i>storage and disposal requirements</i>	<p>Storage and disposal requirements may include:</p> <ul style="list-style-type: none"> referring to dangerous drugs legislation (e.g. management of schedule 8) sharps storing high risk items (e.g. oxygen cylinders, other inflammatory gases) using chemicals (e.g. disinfectants, clinical waste).
Knowledge Evidence	Notes
Outline relevant <i>legislation, regulations, standards and codes of practice</i> that affect stock	<p>Legislation, regulations, standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> archiving and disposal local, state and territory WHS legislation storage, security and access.



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Level 4

BSBMED304 Assist in controlling stocks and supplies**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Office equipment and resources</i>	Office equipment and resources may include: <ul style="list-style-type: none"> • digital resources and technologies (e.g. fax, internet) • charts (e.g. eye charts) • organisational applications (e.g. billing, medical or note applications) • organisational policies and procedures • personal protective equipment • simulated work environment • storage access.



BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Seek clarification with <i>relevant personnel</i> of unclear or <i>ambiguous procedures</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. suppliers) internal personnel (e.g. practice managers, supervisors, doctors, nurses). <p>Ambiguous procedures may include:</p> <ul style="list-style-type: none"> conflicting procedures (e.g. differences between purchase order and delivery docket).
1.7 Communicate <i>conflict of interest</i> or potential conflict of interest promptly to manager or supervisor	<p>Conflict of interest may include:</p> <ul style="list-style-type: none"> personal relationship outside of organisation with a patient, staff member or delivery personnel promotion of personal or professional affiliations or services separate to organisation.
2.3 Discuss patient-related matters within the confines of the facility and with <i>appropriate personnel</i> only	<p>Appropriate personnel may include:</p> <ul style="list-style-type: none"> individuals the patient has consented information be released to (e.g. doctors, pharmacists, radiologists, pathologists, relevant medico-legal representatives, healthcare organisations) individuals dealing with mandatory reporting circumstances (e.g. urgent mental health circumstances, welfare checks). <p>Under some mandatory reporting circumstances, consent may not be provided by the patient.</p>
2.4 Seek advice and clarification with <i>relevant personnel</i> where potential <i>confidentiality issues</i> arise in dealings with patients, their families and others	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> practice managers supervisors. <p>Confidentiality issues may include:</p> <ul style="list-style-type: none"> release of patient information without consent (e.g. to authorities).
3.1 Store and appropriately secure patient records and other <i>confidential documentation</i>	<p>Confidential documentation may include:</p> <ul style="list-style-type: none"> patient-related information (e.g. client files).
3.2 Clearly label and store securely according to <i>organisational policies and procedures</i> , all documents required by legislation to be stored for <i>certain periods</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> appropriate disposal of records securing records and ensuring password protection (e.g. for paper-based and electronic documents). <p>Certain periods may depend on:</p> <ul style="list-style-type: none"> active and inactive medical records.



Overview

Level 3

Level 4

BSBMED305 Apply the principles of confidentiality, privacy and security within the medical environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Recognises familiar <i>text types</i> within job specifications and regulatory requirements and uses different <i>strategies</i> to identify relevant information	<p>Text types may include:</p> <ul style="list-style-type: none"> • legislation • organisational policies and procedures • patient files • referral letters • surgical letters. <p>Strategies may include:</p> <ul style="list-style-type: none"> • organisational storage structure and categorisation • naming conventions.
Writing: Produces records and labels according to <i>workplace requirements</i>	<p>Workplace requirements may relate to:</p> <ul style="list-style-type: none"> • naming conventions • organisational procedures • storage systems.
Navigate the world of work: Operates according to <i>ethical guidelines and legislative requirements</i>	<p>Ethical guidelines and legislative requirements may include:</p> <ul style="list-style-type: none"> • inclusive practice standards • organisational and industry codes of conduct • Privacy Act 1988 (Part III, Division 2: Australian Privacy Principles).
Assessment Conditions	Notes
<i>Office equipment and resources</i>	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> • digital resources and technologies (e.g. fax, internet) • organisational applications (e.g. billing, medical or note applications) • organisational policies and procedures • simulated work environment • storage access.



Overview

Level 3

Level 4

BSBMED401 Manage patient recordkeeping system

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access <i>policies and procedures</i> for patient records	<p>Policies and procedures may relate to:</p> <ul style="list-style-type: none"> confidentiality document and file management organisational templates privacy storage, security and access.
1.2 Consult <i>relevant personnel</i> about how the system operates	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> health practitioners (e.g. practice managers, supervisors, doctors, nurses).
1.3 Determine <i>roles and responsibilities</i> for the system operations	<p>Roles and responsibilities may include:</p> <ul style="list-style-type: none"> ensuring systems, policies and procedures are up-to-date holding meetings to clarify roles and responsibilities liaising with external stakeholders. <p>Roles and responsibilities may depend on the organisation and relevant job description.</p>
2.7 Provide authorisation of transfer of records from the workplace according to <i>policies and procedures</i>	<p>Policies and procedures may relate to:</p> <ul style="list-style-type: none"> costs to transfer records secure transfer of records (e.g. checklists).
3.1 Monitor and review implementation of the system to identify <i>improvements</i>	<p>Improvements may include:</p> <ul style="list-style-type: none"> colour coding developing checklists ensuring systems are backed up instructions to support system use other coding practices. <p>Improvements may refer to work practices within the system, rather than to the system itself.</p>
3.2 Make recommendations to <i>relevant personnel</i> for system improvements	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> health practitioners (e.g. practice managers, supervisors, doctors, nurses).



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Level 3

Level 4

BSBMED401 Manage patient recordkeeping system

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00121 Medical Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Identifies and interprets relevant information and ideas within <i>organisational texts</i>	<p>Organisational texts may include:</p> <ul style="list-style-type: none"> legislation (e.g. medico-legal obligations) policies and procedures patient files referral letters reports surgical letters.
Writing: Creates and maintains records using required <i>words and codes</i>	<p>Words and codes may relate to:</p> <ul style="list-style-type: none"> clinical coding requirements organisational naming conventions (e.g. labelling, file saving).
Interact with others: Selects and uses appropriate <i>communication practices</i> when providing training or feedback to others	<p>Communication practices may include:</p> <ul style="list-style-type: none"> following organisational verbal and written communication procedures and chain of command using digital technologies (e.g. internal messaging systems, external social media platforms, surveys, text messages, emails).
Get the work done: Plans and organises own and others' tasks to ensure work is completed according to <i>legislative and organisational requirements</i>	<p>Legislative and organisational requirements may relate to:</p> <ul style="list-style-type: none"> archiving and disposal anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) document and file management local, state and territory work health and safety (WHS) legislation Privacy Act 1988 storage, security and access.
Assessment Conditions	Notes
<i>Office equipment and resources</i>	<p>Office equipment and resources may include:</p> <ul style="list-style-type: none"> digital resources and technologies (e.g. fax, internet) organisational applications (e.g. billing, medical or note applications) organisational policies and procedures simulated work environment storage access.
<i>Documents and records</i>	<p>Documents and records may include:</p> <ul style="list-style-type: none"> accounts organisational templates patient files referrals.



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Marketing

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Level 4

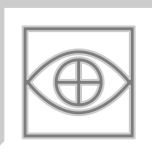
Level 5

Level 6

Marketing Unit Sector Overview

The Marketing (MKG) unit sector incorporates specialist units of competency aimed at supporting and managing the marketing and communications functions of an organisation.

Relevant job roles may include marketing coordinator, communications manager, marketing analyst, marketing consultant and public relations consultant. These skills may also be relevant for an individual who contributes to the marketing function of an organisation as part of their role.



Glossary of common terminology

Code of practice	A code of practice is a document prepared to provide practical guidance on how to comply with a general duty or specific duties according to specified standards or legislation.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
PESTEL	PESTEL stands for political, economic, social, technological, legal and environmental.
Protocols	Protocols outline explicit and specific plans that specify procedures to be followed in defined situations.
SWOT	SWOT stands for strengths, weaknesses, opportunities and threats.

Marketing Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Marketing' unit stream, please refer to the interpretation guidance provided on pages 314 - 375. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



Overview

Level 4

Level 5

Level 6

BSBMKG431 Assess marketing opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00098 Marketing Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Select target market according to <i>task requirements</i> and in consultation with <i>required personnel</i>	<p>Task requirements may relate to:</p> <ul style="list-style-type: none"> conducting market segmentation analysis preparing marketing plans preparing promotional plans preparing research reports. <p>Required personnel may include:</p> <ul style="list-style-type: none"> marketing managers supervisors.
1.2 Establish <i>marketing objectives, organisational structure, and business and marketing plans</i> according to task and organisational requirements	<p>Marketing objectives, organisational structure, and business and marketing plans may be based on:</p> <ul style="list-style-type: none"> access to new markets brand awareness growth increases in market share profit new product developments and services.
2.1 Perform a <i>market segmentation</i> according to task requirements	<p>Market segmentation elements may include:</p> <ul style="list-style-type: none"> behavioural demographic geographic psychographic.
2.2 Identify relevant <i>marketing factors for analysis</i> of market segmentation according to task requirements	<p>Marketing factors for analysis may include:</p> <ul style="list-style-type: none"> internal and external environments (e.g. PESTEL and SWOT analysis) macro and micro environments.
Foundation Skills	Notes
Writing: Prepares <i>strategic business documentation</i> incorporating appropriate vocabulary, grammatical structure and conventions appropriate to text and audience	<p>Strategic business documentation may include:</p> <ul style="list-style-type: none"> briefs environmental analyses (e.g. PESTEL and SWOT) marketing plans supplier analysis.



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BSBMKG431 Assess marketing opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00098 Marketing Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Requirements of <i>legislation</i> affecting marketing roles	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003.
<i>Data collection and analysis techniques</i>	<p>Data collection may include using:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) data • primary and secondary data • quantitative and qualitative data. <p>Analysis techniques may relate to:</p> <ul style="list-style-type: none"> • market share • sales ratios.
<i>Elements of marketing planning</i>	<p>Elements of marketing planning may include:</p> <ul style="list-style-type: none"> • budgets and finances • objectives and strategies • macro and micro situational analysis • timelines.
<i>Marketing communications concepts and processes</i>	<p>Marketing communications concepts and processes may relate to:</p> <ul style="list-style-type: none"> • branding • online presence • positioning • public relations.
<i>Best practice techniques</i> related to marketing	<p>Best practice techniques may include:</p> <ul style="list-style-type: none"> • industry benchmarking.



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BSBMKG432 Research international markets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify and access <i>sources of information</i> relevant to international market research	<p>Sources of information may include:</p> <ul style="list-style-type: none"> academic publications internal and external specialists The Department of Foreign Affairs and Trade.
2.2 Apply <i>statistical analysis</i> tools to information to identify trends	<p>Statistical analysis may include measuring:</p> <ul style="list-style-type: none"> central tendency dispersion relationships and correlations.
2.4 Document and report identified trends and <i>factors that influence trends to relevant personnel</i>	<p>Factors that influence trends may include:</p> <ul style="list-style-type: none"> demographics supply and demand seasonal variations. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. clients, customers) internal personnel (e.g. board of directors, Chief Executive Officers [CEO], marketing managers, supervisors).
Foundation Skills	Notes
Technology: Uses <i>digital tools</i> to complete tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> word processing tools.
Knowledge Evidence	Notes
<i>Cultural aspects</i> relevant to research of international markets	<p>Cultural aspects may relate to:</p> <ul style="list-style-type: none"> behaviours demographics geography psychographics.
<i>Market research techniques</i> and tools, including statistical analysis	<p>Market research techniques may include conducting:</p> <ul style="list-style-type: none"> internal and external environmental analysis (e.g. PESTEL and SWOT).
<i>Formats for reporting research outcomes</i>	<p>Formats for reporting research outcomes may relate to:</p> <ul style="list-style-type: none"> infographics organisational reports presentations.
External and internal <i>information sources</i> related to international markets	<p>Information sources may include:</p> <ul style="list-style-type: none"> academic publications internal and external specialists The Department of Foreign Affairs and Trade.
Assessment Conditions	Notes
<i>Workplace documentation</i> for market research	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> briefings reports.



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BSBMKG433 Undertake marketing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	BSB40120 Certificate IV in Business
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify task requirements according to organisation's marketing plan and relevant <i>policies and procedures</i>	Policies and procedures may relate to: <ul style="list-style-type: none"> customer service privacy and confidentiality storage, security and access.
1.2 Review marketing activities according to industry trends and <i>competitive activity</i>	Competitive activity may relate to: <ul style="list-style-type: none"> benchmarking data competitor analysis market presence size and number of marketing activities.
1.4 Seek approval of action plans from <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> marketing managers supervisors.
2.1 Identify and access <i>resources required for marketing activities</i> according to action plan	Resources required for marketing activities may relate to: <ul style="list-style-type: none"> budgets and finances staff and outsourcing.
2.2 Contribute to assigning responsibilities and functions to relevant <i>marketing personnel</i>	Marketing personnel may include: <ul style="list-style-type: none"> external personnel (e.g. outsourced specialists) internal personnel (e.g. administrators, graphic artists and designers, marketing managers, product and brand managers, team members, website and technical developers).
Performance Evidence	Notes
<i>Recording activities and processes</i> used in marketing activity	Recording activities and processes may include: <ul style="list-style-type: none"> conducting meetings and taking minutes scheduling tasks and activities assigning formal roles and responsibilities using gantt charts.
Knowledge Evidence	Notes
<i>Basic foundations of marketing practices</i>	Basic foundations of marketing practices may relate to analysing: <ul style="list-style-type: none"> 5 P's of Marketing (product, price, promotion, place, people) marketing mix Porter's Five Forces.
Assessment Conditions	Notes
<i>Marketing plans, policies and procedures</i>	Marketing plans, policies and procedures may vary depending on industry context and organisation size and type (e.g. public, private, not-for-profit).



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BSBMKG434 Promote products and services

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00098 Marketing Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify need for promotion of product or service according to <i>organisational and market requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> document filing and management ethical standards organisational goals and objectives privacy and confidentiality quality assurance procedures and manuals storage, security and access work health and safety (WHS). <p>Market requirements may relate to:</p> <ul style="list-style-type: none"> pricing and discount policies.
1.2 Identify overall promotional objectives in consultation with <i>relevant stakeholders</i>	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> marketing managers supervisors.
2.1 Allocate roles and responsibilities for delivery of promotional services and communicate to <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. outsourced specialists) internal personnel (e.g. administrators, graphic artists and designers, marketing managers, product and brand managers, team members, website and technical developers).
3.1 Analyse effectiveness of planning processes using feedback and <i>data</i>	<p>Data may include:</p> <ul style="list-style-type: none"> external data from the Australian Bureau of Statistics (ABS) Internally-generated data market segmentation data (e.g. customer preferences and demographics).
Foundation Skills	Notes
Self-management: Adheres to <i>legislative requirements</i> and organisational policies and procedures	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003.
Teamwork: Selects and uses appropriate <i>conventions and protocols</i> with a range of stakeholders to project a professional image while seeking or sharing information	<p>Conventions and protocols may relate to:</p> <ul style="list-style-type: none"> cadence and ways of working verbal and written communication.
Technology: Uses a range of <i>digital tools to access data</i> , and to extract, organise, integrate and share relevant information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> digital communication tools (e.g. emails, social media) presentation tools spreadsheets word processing tools.



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BSBMKG434 Promote products and services

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00098 Marketing Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Internal and external stakeholders</i> involved in coordinating promotional activities	<p>Internal stakeholders may include:</p> <ul style="list-style-type: none"> marketing managers product and brand managers supervisors team members website and technical developers. <p>External stakeholders may include:</p> <ul style="list-style-type: none"> agencies content writers copywriters outsourced specialists resource suppliers social media experts.
<i>Planning processes</i> for organising promotional activities	<p>A planning process may relate to:</p> <ul style="list-style-type: none"> developing content schedule calendars identifying activity objectives, resource requirements, measurement tools and metrics monitoring and evaluation sign off and approvals target market analysis.
Common <i>promotional activities</i> that could be used to support the marketing objectives	<p>Promotional activities may include:</p> <ul style="list-style-type: none"> digital activities (e.g. social media and email announcements, online product launches, websites) traditional activities (e.g. print media, radio, client and employee events).



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BSBMKG435 Analyse consumer behaviour**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	N/A
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify consumer attributes for market from market profile and existing <i>customer data</i>	Customer data may relate to: <ul style="list-style-type: none"> customer preferences purchasing behaviours sales history.
3.2 Clarify the role of the consumer in the digital marketing environment and model <i>engagement conversations and interventions</i>	Engagement conversations and interventions may include: <ul style="list-style-type: none"> calls to action contests through social media platforms recognition posts and emails.
3.3 Confirm focus of appeal meets <i>legal</i> and <i>ethical obligations</i> and budgetary requirements of marketing plan	Legal obligations may relate to: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. Ethical obligations may relate to: <ul style="list-style-type: none"> copyright corporate social responsibility (CSR) organisational and industry codes of practice sustainability.
Foundation Skills	Notes
Writing: Prepares <i>strategic business documentation</i> incorporating appropriate vocabulary, grammatical structure and conventions appropriate to purpose and audience	Strategic business documentation may include: <ul style="list-style-type: none"> briefs environmental analyses (e.g. PESTEL and SWOT) marketing plans supplier analysis.
Technology: Uses a range of <i>digital tools</i> to access data, and to extract, organise, integrate and share relevant information	Digital tools may include: <ul style="list-style-type: none"> digital communication tools (e.g. emails, social media) presentation tools spreadsheets word processing tools.



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BSBMKG435 Analyse consumer behaviour**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	N/A
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Marketing communication concepts and processes</i>	Marketing communication concepts and processes may relate to: <ul style="list-style-type: none"> • branding • online presence • packaging • public relations • target audience.
<i>Current digital channels</i> relevant to the business and consumer	Digital channels may include: <ul style="list-style-type: none"> • emails • social media • text messages • websites.
<i>Organisational structures, procedures</i> and marketing objectives	Organisational structures and procedures may relate to: <ul style="list-style-type: none"> • approvals and authorisation • reporting protocols.
Assessment Conditions	Notes
<i>Software and technology</i> for consumer behaviour analysis	Software and technology may include: <ul style="list-style-type: none"> • analytics software • social media platforms • survey software.



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BSBMKG436 Design and test direct marketing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>types of direct marketing</i> and select the most suitable form according to marketing objectives and goals	Types of direct marketing may include marketing via: <ul style="list-style-type: none"> • email • direct mail • online advertisements • social media • telephone.
2.1 Identify <i>objectives</i> and parameters for testing direct marketing activities	Objectives for testing may include: <ul style="list-style-type: none"> • evaluating distribution channels • gauging customer interest • identifying issues • raising brand awareness.
2.3 Analyse and select <i>testing method</i> according to task objectives	Testing methods may relate to: <ul style="list-style-type: none"> • customer service • distribution • pricing • products and services.
3.1 Collate results according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • branding • privacy and confidentiality • storage, security and access.
3.2 Use <i>statistical techniques</i> to analyse results	Statistical techniques may include measuring: <ul style="list-style-type: none"> • averages • relationships and correlations • standard deviations.
3.3 Refine <i>direct response offers</i> according to results obtained	Direct response offers may be communicated via: <ul style="list-style-type: none"> • email • direct mail • online advertisements • social media • telephone.
3.4 Document and present results to <i>relevant personnel</i> according to organisational policies and procedures	Relevant personnel may include: <ul style="list-style-type: none"> • marketing managers • supervisors.
Foundation Skills	Notes
Self-management: Identifies, develops and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	Explicit and implicit protocols may relate to: <ul style="list-style-type: none"> • organisational culture • reporting • verbal and written communication.
Technology: Identifies functions and key features of common <i>digital systems and tools</i> and operates them effectively to complete routine tasks	Digital systems and tools may include: <ul style="list-style-type: none"> • digital communication tools (e.g. emails, social media) • presentation tools • spreadsheets • word processing tools.



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BSBMKG436 Design and test direct marketing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Marketing communication concepts and processes</i>	Marketing communication concepts and processes may relate to: <ul style="list-style-type: none"> • branding • online presence • packaging • public relations • target audience.
<i>Media options for direct marketing activities</i>	Media options may include: <ul style="list-style-type: none"> • email • direct mail • online advertisements • social media • telephone.
<i>Statistical methods, tests and techniques can be used for measurement and analysis</i>	Statistical methods, tests and techniques may include measuring: <ul style="list-style-type: none"> • averages • relationships and correlations • standard deviations.
<i>Software applications used in direct marketing</i>	Software applications may include: <ul style="list-style-type: none"> • content management software • customer relationship management (CRM) databases • marketing automation software.
Assessment Conditions	Notes
<i>Workplace documentation and resources relevant to performance evidence</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> • briefings • marketing plans • organisational policies and procedures • reports.



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BSBMKG437 Create and optimise digital media

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>measurable impact objectives</i> for digital media	Measurable impact objectives may relate to: <ul style="list-style-type: none"> brand promotion enhancing client engagement increasing sales.
1.2 Analyse existing <i>online and offline channel data</i> for insights and gaps in engagement and expectations	Online and offline channel data may relate to: <ul style="list-style-type: none"> customer complaints and feedback repeat business number of views and sales.
1.3 Identify <i>tools and technologies</i> accessed by customers	Tools and technologies may include: <ul style="list-style-type: none"> computers mobile devices social media websites.
1.4 Establish <i>audience engagement characteristics, expectations and responses</i>	Audience engagement characteristics, expectations and responses may relate to: <ul style="list-style-type: none"> attitudes behaviours.
2.1 Use <i>technology</i> to create a deliverable according to task and organisational requirements	Technology may include: <ul style="list-style-type: none"> presentation tools spreadsheets word processing tools.
Foundation Skills	Notes
Writing: Researches, plans and prepares <i>documentation</i> using format and language appropriate to context, organisational requirements and audience	Documentation may include: <ul style="list-style-type: none"> briefings marketing plans reports.
Technology: Uses and manipulates <i>digital technology</i> to create, extend and enhance job role, products and capacity to deliver optimised digital media	Digital technology may include: <ul style="list-style-type: none"> digital communication tools (e.g. emails) social media virtual meeting technology websites.
Technology: Uses <i>tools and technologies</i> for visualisations, dashboards and reports for a unified view across multiple digital platforms	Tools and technologies may include: <ul style="list-style-type: none"> data visualisation tools presentation tools spreadsheets word processing tools.



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BSBMKG437 Create and optimise digital media**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary**Performance Evidence**

Performance Evidence	Notes
Model and test <i>alternative methods and techniques</i> to optimise digital impact	Alternative methods and techniques may relate to: <ul style="list-style-type: none"> customer service distribution pricing products and services.
Use <i>data evaluation methods</i>	Data evaluation methods may include: <ul style="list-style-type: none"> interviews and focus groups surveys.

Knowledge Evidence

Knowledge Evidence	Notes
Industry level <i>performance metrics and measures</i>	Performance metrics and measures may relate to: <ul style="list-style-type: none"> customer satisfaction efficiency quality revenue.
<i>Characteristics of users</i> across alternative digital channels	Characteristics of users may relate to: <ul style="list-style-type: none"> behaviours demographic factors geographic factors psychographic factors.
<i>Nodes of integration</i> across multiple digital environments	Nodes of integration may relate to: <ul style="list-style-type: none"> customers business units suppliers third-party software systems and technologies.

Assessment Conditions

Assessment Conditions	Notes
<i>Legislation and regulations</i> for digital media	Legislation and regulations may relate to: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003.
<i>Communications equipment and technology</i> required for task	Communications equipment and technology may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases digital communication tools (e.g. emails) virtual meeting technology.
<i>Workplace documentation</i> and resources relevant to digital media	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing plans organisational policies and procedures reports.
<i>Industry software packages and apps</i> according to task requirements	Industry software packages and apps may include: <ul style="list-style-type: none"> CRMs presentation tools spreadsheets word processing tools.



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BSBMKG438 Implement and monitor advertising production

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Confirm <i>advertising and media requirements</i> according to creative brief, organisational and legislative requirements	Advertising and media requirements may relate to: <ul style="list-style-type: none"> branding online presence packaging.
1.4 Seek approval from <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> marketing managers supervisors.
3.4 Establish <i>procedures for ongoing monitoring</i>	Procedures for ongoing monitoring may relate to: <ul style="list-style-type: none"> evaluating business relationships identifying risks and issues.
Foundation Skills	Notes
Teamwork: Uses a range of <i>strategies to establish connections when communicating</i> with relevant personnel to seek and share information	Strategies to establish connections when communicating may relate to: <ul style="list-style-type: none"> frequency of communication using a mix of verbal, non-verbal and visual communication techniques.
Technology: Uses <i>digital technologies and systems</i> to locate information, and enter data accurately	Digital technologies and systems may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases spreadsheets.
Performance Evidence	Notes
Use appropriate <i>industry technology</i>	Industry technology may include: <ul style="list-style-type: none"> data servers social media websites.
Knowledge Evidence	Notes
Industry products and services including <i>media types and media vehicles</i>	Media types and media vehicles may include: <ul style="list-style-type: none"> internet magazines and newspapers podcasts radio social media television.
<i>Legal and ethical requirements</i> for the advertising industry	Legal requirements may relate to: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. Ethical requirements may relate to: <ul style="list-style-type: none"> copyright corporate social responsibility (CSR) organisational and industry codes of practice sustainability.



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BSBMKG438 Implement and monitor advertising production

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Principles of advertising and marketing mix</i>	Principles of advertising and marketing mix may relate to: <ul style="list-style-type: none"> • campaign duration • customer • packaging • pricing • products and services on offer • visual consistency.
Assessment Conditions	Notes
<i>Software</i> required to implement and monitor advertising plans	Software may include: <ul style="list-style-type: none"> • project management software • scheduling software.
Relevant <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • branding • privacy and confidentiality • storage, security and access.
Relevant <i>organisational scheduling procedures</i>	Organisational scheduling procedures may relate to: <ul style="list-style-type: none"> • communication protocols • resource requirements • technology use.



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BSBMKG439 Develop and apply knowledge of communications industry

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40820 Certificate IV in Marketing and Communication	N/A
Skill sets	BSBSS00099 Communications and Public Relations Foundations Skill Set BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Identify resources and task requirements for developing deliverables, with <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. outsourced specialists) internal personnel (e.g. marketing managers, product and brand managers, supervisors, team members, website and technical developers).
2.2 Use research to prepare deliverable according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> branding social media templates.
2.4 Establish <i>criteria for assessing deliverable</i>	<p>Criteria for assessing deliverables may relate to:</p> <ul style="list-style-type: none"> key performance indicators (KPIs) sales, profit and market analysis timelines.
Knowledge Evidence	Notes
<i>Employment obligations and opportunities</i> of the communications industry	<p>Employment obligations and opportunities may relate to:</p> <ul style="list-style-type: none"> individual contracts industry codes of conduct.
Current <i>digital communications technologies</i> , platforms and devices	<p>Digital communications technologies may include:</p> <ul style="list-style-type: none"> cloud-based technology emails messaging services search engine optimisation social media virtual meeting technology.
<i>Principles and practices of communications</i> and media strategies	<p>Principles and practices of communications may relate to:</p> <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations communication styles and theories organisational and industry codes of conduct.
Assessment Conditions	Notes
<i>Legislation and regulations</i> relevant to communications industry	<p>Legislation may include:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Regulations may relate to:</p> <ul style="list-style-type: none"> ACCC regulations organisational and industry codes of conduct.



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BSBMKG440 Apply marketing communication across a convergent industry

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00099 Communications and Public Relations Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify <i>legislation, regulations and policies</i> applicable to convergent industry	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Regulations and policies may relate to:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations • organisational and industry codes of conduct.
2.1 Identify existing <i>convergent tools and techniques</i> in the marketing communication environment and assess their applicability	<p>Convergent tools and techniques may include:</p> <ul style="list-style-type: none"> • clustering and grouping • critical thinking and analysis • evaluation matrix.
3.3 Establish <i>channels</i> to respond to customer perspectives	<p>Channels may include:</p> <ul style="list-style-type: none"> • email • direct mail • social media • telephone.
Foundation Skills	Notes
Writing: Researches, plans and prepares <i>documentation</i> using format and language appropriate to context, organisational requirements and audience	<p>Documentation may include:</p> <ul style="list-style-type: none"> • briefings • marketing plans • reports.
Self-management: Identifies and complies with <i>organisational policies and procedures</i> , and <i>legislative requirements</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • branding • social media • templates. <p>Legislative requirements may relate to those listed under 'legislation' above.</p>
Knowledge Evidence	Notes
<i>Characteristics of convergent approaches</i> to marketing communication	<p>Characteristics of convergent approaches may relate to:</p> <ul style="list-style-type: none"> • customer-orientation • integrated marketing • supply chains.
<i>Customers role</i> within convergent marketing	<p>Customers role may be:</p> <ul style="list-style-type: none"> • at the centre of the marketing strategy (e.g. the customer is targeted through all means).



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BSBMKG440 Apply marketing communication across a convergent industry

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00099 Communications and Public Relations Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Impact of convergence on <i>traditional marketing approaches</i>	Traditional marketing approaches may include: <ul style="list-style-type: none"> • direct mail and sales • print advertising • word-of-mouth.
Current <i>technologies and distributed services</i> that impact on convergent solutions	Technologies and distributed services may include: <ul style="list-style-type: none"> • customer relationship management (CRM) databases.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources for marketing across a convergent industry	Workplace documentation may include: <ul style="list-style-type: none"> • briefings • marketing plans • organisational policies and procedures • reports.



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BSBMKG441 Develop public relations documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00099 Communications and Public Relations Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify task objectives and relevant <i>legal</i> and <i>ethical frameworks</i>	<p>Legal frameworks may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Ethical frameworks may relate to:</p> <ul style="list-style-type: none"> • copyright • corporate social responsibility (CSR) • organisational and industry codes of practice • sustainability.
1.2 Research previous <i>organisational public relations documents</i> , distribution channel information and <i>evaluation data</i>	<p>Organisational public relations documents may include:</p> <ul style="list-style-type: none"> • briefings • marketing and strategic plans • media releases • reports.
1.3 Confirm document objectives, message and process with <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. clients, outsourced specialists) • internal personnel (e.g. marketing managers, product and brand managers, team members).
1.4 Identify resources, timelines and costs in consultation with <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. clients, outsourced specialists) • internal personnel (e.g. marketing managers, product and brand managers, team members).
3.4 Record and file evaluation results and recommendations for future improvements according to <i>organisational policy and procedure</i>	<p>Organisational policy and procedures may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality • storage, security and access.
Foundation Skills	Notes
Reading: Checks <i>workplace documentation</i> for clarity, accuracy, compliance with house style and legislative, regulatory and ethical requirements	<p>Workplace documentation may include those listed under 'organisational public relations documents'.</p>
Self-management: Adheres to <i>implicit and explicit organisation policies and procedures</i>	<p>Implicit and explicit organisation policies and procedures may relate to:</p> <ul style="list-style-type: none"> • organisational culture • reporting • verbal and written communication.



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BSBMKG441 Develop public relations documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00099 Communications and Public Relations Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Principles and practices of public relations</i>	<p>Principles and practices of public relations may relate to:</p> <ul style="list-style-type: none"> • brand and reputation • communication styles and theories • media relations.
<i>Methods to assess effectiveness of public relations documents in fulfilling task objectives, including stakeholder feedback</i>	<p>Methods to assess effectiveness of public relations documents may include:</p> <ul style="list-style-type: none"> • analysing social media reach (e.g. social shares) • conducting customer and client surveys and interviews • monitoring number of views and sales.
<i>Key media and media distribution channels</i>	<p>Key media and media distribution channels may include:</p> <ul style="list-style-type: none"> • email • direct mail • internet • magazines and newspapers • podcasts • radio • social media • telephone • television.
<i>Key provisions of relevant legislation, codes of practice and national standards that affect public relations campaigns</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.



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BSBMKG442 Conduct e-marketing communications

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>legal, ethical and organisational frameworks</i> related to task requirements	<p>Legal frameworks may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Ethical and organisational frameworks may relate to:</p> <ul style="list-style-type: none"> • copyright • corporate social responsibility (CSR) • organisational and industry codes of practice • sustainability.
1.4 Select <i>e-marketing platforms</i> for advertisement according to task requirements and organisational policy	<p>E-marketing platforms may include:</p> <ul style="list-style-type: none"> • internet advertisements • social media • websites.
3.2 Evaluate e-marketing advertisements against <i>measures of effectiveness</i> and record outcomes according to <i>organisational requirements</i>	<p>Measures of effectiveness may relate to:</p> <ul style="list-style-type: none"> • awareness • customer satisfaction • purchasing behaviours • repeat business. <p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination • privacy and confidentiality • storage, security and access.
Knowledge Evidence	Notes
Key provisions of relevant <i>legislation, codes of practice and national standards</i> that affect marketing operations	<p>Legislation may include those listed under 'legal frameworks' above.</p> <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>Intellectual property requirements</i>	<p>Intellectual property requirements may relate to:</p> <ul style="list-style-type: none"> • copyright • domain names • trademarks.
<i>Principles of marketing and advertising</i>	<p>Principles of marketing and advertising may relate to:</p> <ul style="list-style-type: none"> • customers • campaign duration • creativity • packaging • pricing • products and services on offer • visual consistency.



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BSBMKG442 Conduct e-marketing communications

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Software applications</i> used in conducting electronic advertising and marketing	Software applications may be used for: <ul style="list-style-type: none"> internet advertisements social media websites.
Assessment Conditions	Notes
<i>Legislation, regulations, standards and codes</i> for e-marketing	Legislation may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. Regulations, standards and codes may include: <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations industry standards organisational and industry codes of practice.
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing plans organisational policies and procedures reports.



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BSBMKG541 Identify and evaluate marketing opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	BSB50120 Diploma of Business
Skill sets	BSBSS00108 Marketing and Communication Skill Set BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Analyse the viability of each opportunity	<p>Analysing the viability of each opportunity may include considering:</p> <ul style="list-style-type: none"> environmental analysis (e.g. PESTEL and SWOT) long-term profitability macro and micro environmental conditions sustainability.
3.1 Seek feedback from <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers, suppliers) internal stakeholders (e.g. board of directors, finance teams, marketing managers, senior management, team members).
3.5 <i>Document</i> and communicate viability of marketing opportunities to key stakeholders	<p>Documenting viability may include:</p> <ul style="list-style-type: none"> completing a competitive analysis using tables, charts and graphs writing reports.
Foundation Skills	Notes
Numeracy: Evaluates <i>financial and marketing data</i> using whole numbers, decimals and percentages to make accurate calculations	<p>Financial and marketing data may relate to:</p> <ul style="list-style-type: none"> external data from Australian Bureau of Statistics (ABS) market share sales and profit data segmentation data (e.g. customer preferences and demographics).
Self-management: Identifies and follows <i>explicit and implicit organisational protocols</i> and meets expectations associated with own role	<p>Explicit and implicit organisational protocols may relate to:</p> <ul style="list-style-type: none"> organisational culture reporting verbal and written communication.



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BSBMKG541 Identify and evaluate marketing opportunities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	BSB50120 Diploma of Business
Skill sets	BSBSS00108 Marketing and Communication Skill Set BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of relevant <i>legislation, codes of practice and national standards</i> affecting marketing operations	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>Statistical methods and techniques</i> to evaluate marketing opportunities, including forecasting techniques	<p>Statistical methods and techniques may include:</p> <ul style="list-style-type: none"> • evaluating return on investment (ROI) • extrapolating trends • identifying break-even points and correlations • making projections.



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BSBMKG542 Establish and monitor the marketing mix**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	N/A
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 <i>Test effects of components of marketing mix</i> on each other and relative importance to customer base	Testing effects of components of marketing mix may include: <ul style="list-style-type: none"> • conjoint analysis • correlation analysis and interdependence • market tests • sales effects.
2.1 Identify required <i>resources</i>	Resources may include: <ul style="list-style-type: none"> • budgets and finances • content production resources • human capital • technical expertise.
2.2 Brief <i>stakeholders</i> of roles and responsibilities in implementation	Stakeholders may include: <ul style="list-style-type: none"> • external stakeholders (e.g. outsourced specialists) • internal stakeholders (e.g. marketing managers, product and brand managers, supervisors, team members).
2.3 Establish <i>communication and team building strategies</i>	Communication and team building strategies may relate to: <ul style="list-style-type: none"> • team theories (e.g. storming, norming, forming and performing).
2.4 Establish <i>strategies for monitoring the marketing activities</i>	Strategies for monitoring the marketing activities may incorporate: <ul style="list-style-type: none"> • customer and client feedback • data analytics • digital tools and software • surveys • variance analyses.
Foundation Skills	Notes
Numeracy: Evaluates <i>financial and marketing data</i> using whole numbers, decimals and percentages to make accurate calculations	Financial and marketing data may relate to: <ul style="list-style-type: none"> • external data from Australian Bureau of Statistics (ABS) • market share • sales and profit data • segmentation data (e.g. customer preferences and demographics).



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BSBMKG542 Establish and monitor the marketing mix**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	N/A
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Organisational policies, procedures, products and services related to marketing</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • branding • privacy and confidentiality • storage, security and access.
<i>Principles and concepts of marketing, including consumer and buyer behaviour</i>	Principles and concepts of marketing may include: <ul style="list-style-type: none"> • customers • packaging • pricing • products and services on offer • promotions.
<i>Elements of marketing mix</i>	Elements of marketing mix may include: <ul style="list-style-type: none"> • customer service • distribution • pricing • products and services • promotions.
<i>Methods to gather and analyse marketing information, including variances in marketing revenue and costs</i>	Methods to gather marketing information may include: <ul style="list-style-type: none"> • interviews and focus groups • surveys.
Assessment Conditions	Notes
<i>Legislation, regulations and codes relevant to marketing mix</i>	Legislation may include: <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. Regulations and codes may include: <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations • organisational and industry codes of practice.



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BSBMKG543 Plan and interpret market research

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and select <i>data collection methods</i>	Data collection methods may include: <ul style="list-style-type: none"> • case studies • desktop research • focus groups • one-on-one interviews • surveys.
1.3 Develop <i>market research plan</i>	Market research plans may include: <ul style="list-style-type: none"> • budgets and finances • competitor analysis • consumer trends and demands • environmental analysis (e.g PESTEL and SWOT) timelines.
2.1 Obtain approval from <i>relevant personnel</i> to undertake market research	Relevant personnel may include: <ul style="list-style-type: none"> • external stakeholders (e.g. clients, customers, suppliers) • internal stakeholders (e.g. marketing managers, supervisors, enterprise owners).
3.1 Analyse data obtained from market research using <i>statistical and qualitative techniques</i>	Statistical and qualitative techniques may include: <ul style="list-style-type: none"> • analysing correlations • benchmarking • content and narrative analysis • measuring averages and standard deviations.
4.3 Present research findings to <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> • external stakeholders (e.g. clients, customers) • internal stakeholders (e.g. marketing managers, supervisors, enterprise owners).
Foundation Skills	Notes
Technology: Uses <i>digital technologies and systems</i> to enter and analyse data and to present information	Digital technologies and systems may include: <ul style="list-style-type: none"> • presentation tools • spreadsheets • virtual meeting technology • word processing tools.
Knowledge Evidence	Notes
<i>Software applications</i> that are commonly used in quantitative and qualitative analysis	Software applications may include: <ul style="list-style-type: none"> • digital survey tools • spreadsheets.
<i>Codes of practice and conduct</i> relevant to marketing	Codes of practice and conduct may include: <ul style="list-style-type: none"> • organisational and industry codes of practice and conduct.



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BSBMKG543 Plan and interpret market research

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Legislation, regulations, standards and codes relevant to market research</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Regulations, standards and codes may include:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations • industry standards • organisational and industry codes of practice.
<i>Workplace documentation and resources for market research.</i>	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • briefings • marketing plans • organisational policies and procedures • research reports.



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BSBMKG544 Plan and monitor direct marketing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Present <i>direct marketing activities</i> proposal to <i>relevant personnel</i>	<p>Direct marketing activities may include:</p> <ul style="list-style-type: none"> • advertisements • emails • letters • telephone calls • text messages • websites. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. clients, suppliers) • internal personnel (e.g. marketing managers, supervisors, brand and product managers).
1.6 Develop <i>indicators for evaluating direct marketing activities</i>	<p>Indicators for evaluating direct marketing activities may relate to:</p> <ul style="list-style-type: none"> • automated and manual tasks • budgets and finances • resources • target audience.
2.1 Initiate negotiations with <i>relevant stakeholders</i> and proceed with selected direct marketing activities	<p>Relevant stakeholders may include those listed under 'relevant personnel' above.</p>
2.3 Assemble <i>resources</i> to implement direct marketing activities according to direct marketing activities proposal, negotiation outcomes and <i>legislative requirements</i>	<p>Resources may include:</p> <ul style="list-style-type: none"> • equipment and materials • finances • staff • technology. <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003.
Foundation Skills	Notes
Writing: Prepares detailed <i>documentation</i> using appropriate terminology and format to convey clear messages to team members and relevant stakeholders	<p>Documentation may include:</p> <ul style="list-style-type: none"> • briefings • marketing plans • reports.



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BSBMKG544 Plan and monitor direct marketing activities

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Types of direct marketing activities</i>	Types of direct marketing activities may include: <ul style="list-style-type: none"> • advertisements • emails • letters • telephone calls • text messages • websites.
<i>Negotiation strategies</i>	Negotiation strategies may involve: <ul style="list-style-type: none"> • accommodation • avoidance • collaboration • competition • compromisation.
<i>Methods of evaluating effectiveness of direct marketing activities</i>	Methods of evaluating effectiveness may include: <ul style="list-style-type: none"> • analysing response rates • conducting customer and client surveys and interviews • reviewing sales data.
<i>Sources of advice available on contract requirements for direct marketing activities</i>	Sources of advice may include: <ul style="list-style-type: none"> • business advisors • legal representatives • supervisors.
Assessment Conditions	Notes
<i>Workplace documents and data on direct marketing activities</i>	Workplace documents may include: <ul style="list-style-type: none"> • briefings • marketing plans • organisational policies and procedures • reports.



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BSBMKG545 Conduct marketing audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify scope of marketing audit and <i>audit methodology</i> according to organisational marketing plan	Audit methodology may depend on: <ul style="list-style-type: none"> • associated risks • audit scope • nature of the engagement • size and structure of the organisation.
3.1 Identify <i>external environmental factors</i> that meet requirements of audit process	External environmental factors may include the following factors: <ul style="list-style-type: none"> • cultural • demographic • economic • legal • political • social.
4.1 Identify <i>criteria to use in an internal marketing audit</i> according to organisational requirements	Criteria to use in an internal marketing audit may relate to: <ul style="list-style-type: none"> • internal data (e.g. sales, product and service development) • organisational structures and procedures.
4.3 Record results according to <i>organisational and audit requirements</i>	Organisational and audit requirements may relate to: <ul style="list-style-type: none"> • document and file management • privacy and confidentiality • reporting • storage, security and access.
5.3 Confirm accuracy of marketing audit report with <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> • marketing managers • senior management • supervisors.
Knowledge Evidence	Notes
<i>Research methodologies and data collection techniques</i> appropriate to marketing audits	Research methodologies and data collection techniques may include: <ul style="list-style-type: none"> • desktop research • one-on-one interviews • surveys.
<i>Different types of marketing audits</i>	Types of marketing audits may relate to: <ul style="list-style-type: none"> • environments • functions • organisations • productivity • strategies • systems.



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BSBMKG545 Conduct marketing audits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Documentation and resources</i> used to conduct marketing audit activities	Documentation and resources may include: <ul style="list-style-type: none">• environmental analysis (e.g. PESTEL and SWOT)• marketing and research plans• organisational policies and procedures reports.



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BSBMKG546 Develop social media engagement plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Research and document characteristics and online habits of the target audience according to <i>organisational policy</i>	Organisational policy may relate to: <ul style="list-style-type: none"> privacy and confidentiality storage, security and access.
1.3 Identify and analyse common <i>responses to triggers, interventions, and preferred and avoided behaviours</i> on social media platforms and applications	Responses to triggers, interventions and preferred and avoided behaviour may relate to: <ul style="list-style-type: none"> consistent messaging frequency of content shared type of content shared (e.g. promotional content).
1.5 Document research results and deliver to <i>appropriate personnel</i>	Appropriate personnel may include: <ul style="list-style-type: none"> external stakeholders (e.g. customers, clients, suppliers) internal stakeholders (e.g. marketing managers, brand and product managers, supervisors).
2.3 Establish <i>metrics for social media performance</i> according to organisational strategies	Metrics for social media performance may include: <ul style="list-style-type: none"> level of target audience engagement response rates sales conversions social media reach (e.g. social media views and shares).
3.3 Identify and implement relevant <i>tools</i> and automate the engagement process in applicable delivery areas	Tools may include: <ul style="list-style-type: none"> automations (e.g. automatic updates on social media).
4.1 Develop plan for ongoing review of performance using a <i>social media analytics service</i>	Social media analytics services may include: <ul style="list-style-type: none"> analytics software (e.g. Google Analytics).
Knowledge Evidence	Notes
Features of existing <i>legislation</i> and policy relevant to social media	Legislation may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003.
<i>Features of existing social media platforms</i> and their relevance to key industry functions	Features of existing social media platforms may include: <ul style="list-style-type: none"> advertisement and promotional features engagement features (e.g. likes and comments) personal details.
<i>Performance measures</i> commonly used to evaluate social media engagement	Performance measures may include: <ul style="list-style-type: none"> level of target audience engagement response rates sales conversions social media reach (e.g. social media views and shares).



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BSBMKG546 Develop social media engagement plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
Legislation and <i>regulations</i> for business social media engagement	Regulations may include: <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations.
<i>Workplace documentation</i> and resources relevant to performance evidence.	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing and social media engagement plans organisational policies and procedures reports.



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BSBMKG547 Develop strategies to monetise digital engagement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify task requirements and applicable <i>legal, organisational and financial frameworks</i>	<p>Legal frameworks may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Organisational and financial frameworks may relate to:</p> <ul style="list-style-type: none"> • branding • budgets and financial statements • organisational policies and procedures • privacy and confidentiality • storage, security and access.
1.2 Prepare <i>criterion for channel monetisation</i> according to organisational marketing strategies	<p>Criterion for channel monetisation may relate to:</p> <ul style="list-style-type: none"> • customer reach • technical capabilities.
3.1 Negotiate <i>processing parameters with relevant stakeholders</i> according to task requirements and organisational strategies	<p>Processing parameters may depend on:</p> <ul style="list-style-type: none"> • digital channels • specific technical capabilities. <p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. clients) • internal stakeholders (e.g. marketing managers, supervisors, brand and product managers, website and technical developers).
4.1 Conduct review of performance with <i>financial analytics service</i> according to organisational strategies	<p>Financial analytics services may include:</p> <ul style="list-style-type: none"> • analytics software (e.g. Google Analytics).
4.2 Track <i>transaction metrics</i> using suitable technologies	<p>Transaction metrics may relate to:</p> <ul style="list-style-type: none"> • pay-per-click and cost-per-click • repeat purchases.
4.4 Evaluate and report on monetisation effectiveness to <i>relevant personnel</i>	<p>Relevant personnel may include those listed under 'relevant stakeholders' above.</p>
Foundation Skills	Notes
Reading: Identifies and analyses <i>complex texts</i> to determine legislative, regulatory and business requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • legislation • organisational policies and procedures.



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BSBMKG547 Develop strategies to monetise digital engagement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Features of digital applications</i> required to enable transactions	Features of digital applications may include: <ul style="list-style-type: none"> instant payments internet banking mobile wallets.
<i>Engagement features</i> of common digital financial transaction systems	Engagement features may include: <ul style="list-style-type: none"> mobile device accessibility transaction history.
<i>Financial services legislation</i> that impact on digital financial transactions	Financial services legislation may include: <ul style="list-style-type: none"> Corporations Act 2001 Financial Services Reform Act 2001.
Assessment Conditions	Notes
<i>Legislation</i> and regulations relevant to monetising engagements for businesses	Legislation may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Corporations Act 2001 Financial Services Reform Act 2001 Privacy Act 1988 Spam Act 2003.
<i>Software and technology</i> for monetising engagements for businesses	Software and technology may include: <ul style="list-style-type: none"> digital payment software.
<i>Workplace documentation</i> and resources including policies and procedures for strategy development and business engagements	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing and research plans reports.



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BSBMKG548 Forecast international market and business needs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Apply <i>forecasting technique</i> to Australian and international markets and identify trends and developments	<p>Forecasting techniques may include:</p> <ul style="list-style-type: none"> • projections • scenario planning • surveys • time series analysis.
2.1 Identify <i>organisational business capabilities and resources</i>	<p>Organisational business capabilities may relate to:</p> <ul style="list-style-type: none"> • communications • distribution channels • external environment • technology. <p>Resources may include:</p> <ul style="list-style-type: none"> • brand • equipment and materials • human capital • technology.
3.3 Discuss recommendations with <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. clients, suppliers) • internal personnel (e.g. marketing managers, supervisors, senior management, colleagues).
Foundation Skills	Notes
Numeracy: Analyses and interprets <i>complex business data</i> to track strengths and weaknesses and to forecast trends	<p>Complex business data may include:</p> <ul style="list-style-type: none"> • credit and financial information • organisation profiles • profitability • sales data and trends.
Technology: Uses a range of <i>digital applications</i> to access and filter data, extract, organise, integrate and share relevant information	<p>Digital applications may include:</p> <ul style="list-style-type: none"> • presentation tools • spreadsheets • virtual meeting technology • word processing tools.
Knowledge Evidence	Notes
<i>Legislative and regulatory context</i> of organisation in relation to forecasting market and business needs	<p>Legislative context may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Regulatory context may relate to:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations.



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BSBMKG548 Forecast international market and business needs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Organisational information for forecasting <i>international market and business needs</i> including core activities and capabilities	International market and business needs may relate to: <ul style="list-style-type: none"> accessibility customer preferences and purchasing behaviours demand and supply target markets.
<i>Software</i> commonly used in marketing forecasting and analysis	Software may include: <ul style="list-style-type: none"> spreadsheets.
Assessment Conditions	Notes
<i>Legislation, regulations, standards and codes</i> related to forecasting international marketing needs	Legislation may include: <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 relevant international legislation Spam Act 2003. Regulations, standards and codes may include: <ul style="list-style-type: none"> ACCC regulations industry standards organisational and industry codes of practice.
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing and research plans organisational policies and procedures reports.



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BSBMKG549 Profile and analyse consumer behaviour for international markets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Develop <i>positioning strategy</i>	Positioning strategies may relate to: <ul style="list-style-type: none"> customer benefits pricing product characteristics (e.g. colour, size, shape) product use and application.
3.1 Determine <i>strategies for profiling and analysing consumer behaviours</i>	Strategies for profiling and analysing consumer behaviours may relate to: <ul style="list-style-type: none"> comparing qualitative and quantitative data market segmentation.
3.2 Seek areas for improvement to developed strategy in consultation with <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> marketing managers supervisors.
Foundation Skills	Notes
Technology: Uses <i>digital tools</i> to gather and analyse data about consumer behaviours	Digital tools may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases spreadsheets.
Knowledge Evidence	Notes
Consumer profile content including <i>consumer characteristics</i> in standard statistical terms	Consumer characteristics may relate to: <ul style="list-style-type: none"> behaviours demographics geography psychographics.
<i>Market profiling techniques</i> and related software programs	Market profiling techniques may involve: <ul style="list-style-type: none"> desktop research interviews surveys.
<i>Sources of information</i> on international markets	Sources of information may include: <ul style="list-style-type: none"> international databases international trade specialists internet.
<i>Segment descriptors</i> to define international target markets	Segment descriptors may relate to: <ul style="list-style-type: none"> behaviours demographics geography psychographics.



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BSBMKG549 Profile and analyse consumer behaviour for international markets**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Legislation, regulations, standards for markets for international markets</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • relevant international legislation • Spam Act 2003. <p>Regulations and standards may include:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations • industry standards • international standards and regulations.



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BSBMKG550 Promote products and services to international markets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and confirm task objectives and requirements, budget timeline, and target market with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, contractors, suppliers, agencies) internal stakeholders (e.g. marketing managers, brand and product managers, senior management).
1.2 Access <i>relevant information</i> for assistance in planning	<p>Relevant information may be sourced from:</p> <ul style="list-style-type: none"> academic publications internal and external specialists international databases international government departments and agencies The Department of Foreign Affairs and Trade.
1.3 Develop a potential range of <i>promotional activities</i> for international target market according to regulatory and organisational guidelines, international requirements and promotional plans	<p>Promotional activities may include:</p> <ul style="list-style-type: none"> advertisements events and functions media releases and announcements product launches websites.
2.1 Identify and prepare <i>personnel</i> and <i>resources</i> for implementation of promotional activity	<p>Personnel may include:</p> <ul style="list-style-type: none"> contractors marketing staff promotional staff <p>Resources may include:</p> <ul style="list-style-type: none"> budgets and finances promotional products technology venues.
2.2 Implement marketing activity according to <i>legal, regulatory and organisational requirements</i>	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Regulatory and organisational requirements may relate to:</p> <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations ethical standards privacy and confidentiality quality processes and standards storage, security and access work health and safety (WHS).

Foundation Skills

Notes

Self-management: Identifies and follows *explicit and implicit protocols* and meets expectations associated with own role

Explicit and implicit protocols may relate to:

- organisational culture
- reporting
- verbal and written communication.



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BSBMKG550 Promote products and services to international markets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses a range of <i>digital applications</i> to access data, extract, organise, and integrate relevant information	Digital applications may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases spreadsheets word processing tools.
Knowledge Evidence	Notes
Key provisions of legislation, <i>codes of practice and standards</i> affecting international market promotion opportunities	Codes of practice and standards may relate to: <ul style="list-style-type: none"> ethical and industry standards organisational and industry codes of practice.
<i>Strategies for building and maintaining client relationships</i>	Strategies for building and maintaining client relationships may relate to: <ul style="list-style-type: none"> frequency of communication using a mix of verbal, non-verbal and visual communication techniques.
<i>Marketing concepts, principles and strategies</i>	Marketing concepts, principles and strategies may relate to: <ul style="list-style-type: none"> branding customers online presence packaging positioning pricing products and services on offer promotions public relations.
<i>Evaluation principles and strategies</i>	Evaluation principles and strategies may relate to: <ul style="list-style-type: none"> regular evaluation practices value chain feedback (e.g. from suppliers and customers).
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> briefings marketing and research plans organisational policies and procedures reports.
<i>Organisational policies</i> for promoting products and services to international markets	Organisational policies may relate to: <ul style="list-style-type: none"> privacy and confidentiality quality processes and standards storage, security and access WHS.



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BSBMKG551 Create multiplatform advertisements for mass media**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Prepare multiplatform advertisements for mass media according to <i>task objectives, client and platform specifications</i>	<p>Task objectives, client and platform specifications may relate to:</p> <ul style="list-style-type: none"> • brand • design • technology.
Foundation Skills	Notes
Learning: Identify and interpret a range of textual information to ensure client requirements and <i>legal and ethical requirements</i> are met	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Ethical requirements may relate to:</p> <ul style="list-style-type: none"> • ethical and industry standards • organisational policies and procedures.
Technology: Identifies purposes, specific functions and key features of common <i>digital systems and tools</i> , and operates them effectively to product digital media	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • graphic design applications • social media platforms • video editing software • websites.
Knowledge Evidence	Notes
<i>Purposes and principles of advertising</i>	<p>Purposes and principles of advertising may relate to:</p> <ul style="list-style-type: none"> • establishing market presence • raising awareness of brands, products and services.
<i>Principles of consumer behaviour</i>	<p>Principles of consumer behaviour may relate to:</p> <ul style="list-style-type: none"> • personal factors (e.g. age, occupation, lifestyle) • psychological factors (e.g. motivation, perception, attitudes) • social and cultural factors (e.g. community, family, religion).
<i>Content and development requirements</i> for specific advertising platform	<p>Content and development requirements may relate to:</p> <ul style="list-style-type: none"> • research and planning • resources (e.g. staff, equipment and materials) • technology.



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BSBMKG551 Create multiplatform advertisements for mass media

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Organisational policies and procedures</i> for developing advertisements	Organisational policies and procedures may relate to: <ul style="list-style-type: none">• ethical standards• privacy and confidentiality• quality processes and standards• storage, security and access• work health and safety (WHS).



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BSBMKG552 Design and develop marketing communication plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	N/A
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Obtain <i>client and product information</i>	Client and product information may include: <ul style="list-style-type: none"> branding positioning organisational objectives and strategic direction sales segmentation information.
2.1 Undertake and document <i>research</i> according to task requirements	Research may include: <ul style="list-style-type: none"> primary and secondary research.
2.2 Communicate outcomes and findings to <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers) internal stakeholders (e.g. marketing managers, brand and product managers, supervisors).
2.6 Establish <i>success measures</i> for marketing communication plan	Success measures may include: <ul style="list-style-type: none"> brand awareness key performance indicators (KPIs) profit revenue.
3.2 <i>Present</i> marketing communication plan to client	Presenting may include using: <ul style="list-style-type: none"> digital tools (e.g. presentation tools, virtual meeting technology) effective and persuasive communication techniques.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex texts</i> to determine requirements of advertising brief, legislative, regulatory and business requirements	Complex texts may include: <ul style="list-style-type: none"> legislation organisational policies and procedures.
Technology: Uses <i>digital technologies</i> to enter data, organise and present information	Digital technologies may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases presentation tools spreadsheets word processing tools.
Knowledge Evidence	Notes
<i>Procedures for developing budget proposals</i>	Procedures for developing budget proposals may include using: <ul style="list-style-type: none"> marketing budget templates spreadsheets.



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BSBMKG552 Design and develop marketing communication plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	N/A
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Legislation, regulations and codes of practice</i> for marketing communications plans	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Regulations and codes of practice may include:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations • organisational and industry codes of practice.



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BSBMKG553 Develop public relations campaigns

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>objective of a complex public relations campaign</i> brief	<p>Objectives of a complex public relations campaign may include:</p> <ul style="list-style-type: none"> improving relationships increasing public support managing reputation.
1.2 Identify campaign's messages, strategies, roles and responsibilities, <i>resource requirements, and client requirements</i>	<p>Resource requirements and client requirements may relate to:</p> <ul style="list-style-type: none"> budgets and finances media deadlines and personnel target audience.
1.3 Identify <i>legal and ethical constraints</i> in the brief	<p>Legal constraints may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Ethical constraints may relate to:</p> <ul style="list-style-type: none"> ethical standards and principles organisational and industry codes of practice societal and cultural expectations and influences.
2.2 Identify and evaluate a range of options for <i>message concepts</i>	<p>Message concepts may relate to:</p> <ul style="list-style-type: none"> corporate social responsibility (CSR) employee relations public affairs.
2.4 Consult media directories and confirm <i>suitable journalists and personnel</i> are selected for campaign	<p>Suitable journalists and personnel may depend on:</p> <ul style="list-style-type: none"> nature of public relations campaign public perceptions target audience.
3.4 Develop and document <i>control mechanisms</i>	<p>Control mechanisms may relate to:</p> <ul style="list-style-type: none"> contingency plans incentives.
3.5 Finalise plan and present document to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers) internal stakeholders (e.g. marketing managers, brand and product managers, supervisors, website and technical developers).



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BSBMKG553 Develop public relations campaigns

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital applications</i> to record, store, retrieve and share documents	Digital applications may include: <ul style="list-style-type: none"> cloud-based storage systems digital collaboration tools (e.g. emails) presentation tools spreadsheets virtual meeting technology word processing tools.
Knowledge Evidence	Notes
Key provisions of relevant legislation, <i>codes of practice and national standards</i> that affect public relations	Codes of practice and national standards may include: <ul style="list-style-type: none"> industry standards organisational and industry codes of practice.
<i>Techniques for managing complex public relations projects</i>	Techniques for managing complex public relations projects may include: <ul style="list-style-type: none"> undertaking effective planning processes using project management and scheduling tools and software.
<i>Techniques used to identify and manage risks</i>	Techniques used to identify and manage risks may include: <ul style="list-style-type: none"> conducting risk analyses developing risk management plans using risk registers and risk matrices.



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BSBMKG554 Plan and develop public relations publications

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Summarise findings to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers) internal stakeholders (e.g. marketing managers, brand and product managers, supervisors, website and technical developers).
1.4 Analyse and select <i>criteria for segmenting audience</i> according to research findings and objectives	<p>Criteria for segmenting audience may include:</p> <ul style="list-style-type: none"> personal factors (e.g. age, occupation, lifestyle) psychological factors (e.g. motivation, perception, attitudes) social and cultural factors (e.g. community, family, religion).
2.1 Document and obtain agreement on publication objectives and central message from relevant personnel according to <i>legal and regulatory requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Regulatory requirements may relate to:</p> <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations.
2.5 Develop <i>criteria to test and evaluate success</i> of the publication	<p>Criteria to test and evaluate success may relate to:</p> <ul style="list-style-type: none"> improving brand reputation increasing organisational awareness increasing sales.
3.3 Select and contract suppliers to complete <i>publication production processes</i>	<p>Publication production processes include:</p> <ul style="list-style-type: none"> editing distributing marketing printing reviewing and approving.
Foundation Skills	Notes
Technology: Uses <i>digital applications</i> to record, store, retrieve and share documents	<p>Digital applications may include:</p> <ul style="list-style-type: none"> cloud-based storage systems digital collaboration tools (e.g. emails) presentation tools spreadsheets virtual meeting technology word processing tools.



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BSBMKG554 Plan and develop public relations publications

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50620 Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Internal and external factors</i> that may impact publication requirements	<p>Internal factors may include:</p> <ul style="list-style-type: none"> communication practices organisational policies and procedures. <p>External factors may include:</p> <ul style="list-style-type: none"> economic trends external stakeholder perceptions legislation public expectations and influences.
<i>Primary and secondary research methods</i> and use in public relations	<p>Primary research methods may include:</p> <ul style="list-style-type: none"> environmental analysis (e.g. PESTEL and SWOT) interviews observations surveys. <p>Secondary research methods may include:</p> <ul style="list-style-type: none"> annual reports customer feedback and complaint records sales reports.
<i>Criteria used to select team members</i>	<p>Criteria used to select team members may be based on:</p> <ul style="list-style-type: none"> capability capacity experience task requirements.
Key provisions of relevant <i>legislation, codes of practice and national standards</i> that affect public relations	<p>Legislation may include:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> industry standards organisational and industry codes of practice.
Relevance of <i>ethics</i> to public relations	<p>Ethics may relate to:</p> <ul style="list-style-type: none"> anti-discrimination corporate social responsibility (CSR) sustainability.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> briefings marketing and public relations plans organisational policies and procedures reports.



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BSBMKG555 Write persuasive copy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	N/A
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assess and select <i>writing techniques</i> according to creative brief	<p>Writing techniques may include using:</p> <ul style="list-style-type: none"> • alliteration • hyperboles • metaphors • personifications • similes.
2.2 Select <i>option/s for communicating</i> required information and images within time and budgetary requirements	<p>Options for communicating may include using:</p> <ul style="list-style-type: none"> • graphic design elements • special effects • text and headlines.
3.3 Seek approval for persuasive content from <i>relevant personnel</i> prior to release	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. clients, outsourced specialists) • internal personnel (e.g. marketing managers, product and brand managers, supervisors, team members).
Knowledge Evidence	Notes
<i>Legislation, standards and codes of practice</i> affecting production and delivery of copy	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Standards and codes of practice may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>Constraints</i> to be considered during analysis, evaluation and preparation of copy	<p>Constraints may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • data integrity • legislation • resources.
Assessment Conditions	Notes
<i>Equipment and resources</i> for advanced copywriting and design	<p>Equipment and resources may include:</p> <ul style="list-style-type: none"> • licensed and online design and copywriting software.



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BSBMKG621 Develop organisational marketing strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60520 Advanced Diploma of Marketing and Communication	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Complete a situational analysis and identify <i>factors impacting marketing direction and performance</i> of the organisation	<p>Factors impacting marketing direction and performance may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • economic trends • competitor behaviour • customer preferences and demands • resource and supplier availability.
2.1 Identify and <i>analyse marketing opportunities for viability</i> and contribution to the business	<p>Analysing marketing opportunities for viability may incorporate:</p> <ul style="list-style-type: none"> • environmental analysis (e.g. PESTEL and SWOT) • long-term profitability analysis • macro and micro environmental analysis • sustainability analysis.
3.2 Formulate related <i>key performance indicators</i> for marketing strategy	<p>Key performance indicators may relate to:</p> <ul style="list-style-type: none"> • customer lifetime value • return on investment (ROI) • sales revenue • social media engagement • website traffic.
3.3 Develop <i>risk management strategy</i> , and identify <i>risks</i> and manage contingencies	<p>Risk management strategies may include:</p> <ul style="list-style-type: none"> • completing a risk matrix • contingency planning • developing risk mitigation plans. <p>Risks may relate to:</p> <ul style="list-style-type: none"> • business operations • competitors • internal environment • macro and micro environments • threats identified in SWOT analysis.
Foundation Skills	Notes
Technology: Uses a range of <i>digital applications</i> to access data, extract, organise, and integrate relevant information	<p>Digital applications may include:</p> <ul style="list-style-type: none"> • cloud-based storage systems • customer relationship management (CRM) databases • presentation tools • spreadsheets • word processing tools.



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BSBMKG621 Develop organisational marketing strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60520 Advanced Diploma of Marketing and Communication	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Cost-benefit analysis techniques</i>	<p>Cost-benefit analysis techniques may include:</p> <ul style="list-style-type: none"> • break-even analysis • click through rates • ratio analysis • return on investment (ROI) • weighted averages.
<i>Key provisions of relevant legislation, codes of practice and national standards affecting marketing operations</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>Principles and concepts of marketing and evaluation methodologies</i>	<p>Principles and concepts of marketing may relate to:</p> <ul style="list-style-type: none"> • branding • customers • online presence • packaging • positioning • pricing • products and services on offer • promotions • public relations. <p>Evaluation methodologies may include:</p> <ul style="list-style-type: none"> • comparative and competitive analysis • value chain analysis.



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BSBMKG622 Manage organisational marketing processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60520 Advanced Diploma of Marketing and Communication	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.3 Develop communication strategy and confirm collaboration between <i>relevant personnel</i> in the <i>marketing mix</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. clients, suppliers, outsourced specialists) internal personnel (e.g. marketing managers, product and brand managers, supervisors, team members). <p>Marketing mix may include:</p> <ul style="list-style-type: none"> distribution pricing product and service design, quality and features promotion.
2.5 Identify and address <i>individual and team underperformance</i> , according to organisational policies and procedures	<p>Individual and team underperformance may be identified through:</p> <ul style="list-style-type: none"> human resources (HR) content performance management processes.
3.1 Monitor overall marketing progress against performance targets use <i>marketing metrics</i>	<p>Marketing metrics may relate to:</p> <ul style="list-style-type: none"> customer lifetime value return on investment (ROI) sales revenue social media engagement website traffic.
Foundation Skills	Notes
Writing: Prepares detailed <i>documentation</i> using appropriate terminology and format to convey clear messages to team members and relevant stakeholders	<p>Documentation may include:</p> <ul style="list-style-type: none"> briefings marketing and research plans reports.
Knowledge Evidence	Notes
<i>Principles of marketing</i> , strategic analysis and strategic management	<p>Principles of marketing may relate to:</p> <ul style="list-style-type: none"> branding customers online presence packaging positioning pricing products and services on offer promotions public relations.



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BSBMKG623 Develop marketing plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60520 Advanced Diploma of Marketing and Communication	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Research <i>market conditions</i>	<p>Market conditions may relate to:</p> <ul style="list-style-type: none"> external environments (e.g. political, economic, social) internal business environments (e.g. supply, resources).
1.2 Consult with <i>key stakeholders</i> and seek additional context	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, outsourced specialists) internal stakeholders (e.g. marketing managers, product and brand managers, supervisors, team members).
2.2 Develop marketing strategies according to marketing objectives and <i>legal</i> and <i>ethical requirements</i>	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Ethical requirements may relate to:</p> <ul style="list-style-type: none"> ethical and industry standards organisational policies and procedures.

Knowledge Evidence	Notes
Common <i>marketing strategies</i> and <i>marketing approaches</i>	<p>Marketing strategies may relate to:</p> <ul style="list-style-type: none"> distribution channels low costs of production product and service differentiation (e.g. features) product range and mix. <p>Marketing approaches may relate to:</p> <ul style="list-style-type: none"> e-marketing direct marketing mass marketing target marketing.
<i>Processes to ensure marketing strategies, approaches and marketing mix align to organisation's objectives</i> and are legal, ethical and achievable	<p>Processes to ensure marketing strategies, approaches and marketing mix align to organisation's objectives may include:</p> <ul style="list-style-type: none"> communicating potential legal and ethical impacts developing long-term and short-term business goals.

Assessment Conditions	Notes
<i>Legislation, regulations, standards and codes</i> relevant to developing marketing plans	<p>Legislation may include those listed under 'legal requirements' above.</p> <p>Regulations, standards and codes may include:</p> <ul style="list-style-type: none"> Australian Competition and Consumer Commission (ACCC) regulations organisational and industry codes of practice.



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BSBMKG624 Manage market research

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access <i>policies and procedures</i> and relevant <i>regulatory guidelines</i> relevant to market research	<p>Policies and procedures may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality • quality assurance • work health and safety (WHS). <p>Regulatory guidelines may relate to:</p> <ul style="list-style-type: none"> • Australian Competition and Consumer Commission (ACCC) regulations
3.1 <i>Monitor work plan activity</i> and confirm market research project plan comply with relevant organisational and legal requirements	<p>Monitoring work plan activity may involve:</p> <ul style="list-style-type: none"> • conducting regular progress reviews • documenting specific roles, responsibilities and tasks • making updates as required • seeking feedback and continuous improvement ideas.
4.5 Seek feedback from <i>relevant stakeholders</i> on research process and findings	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • marketing managers • product and brand managers • senior management • supervisors • team members.
Foundation Skills	Notes
Writing: Prepares a range of <i>workplace documentation</i> , using clear language and required format, to convey priorities and critical strategic information	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • briefings • market research plans and reports.



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BSBMKG625 Implement and manage international marketing programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Develop strategic objectives and related <i>key performance indicators</i> by product, service, country or international grouping, and overall performance	Key performance indicators may relate to: <ul style="list-style-type: none"> customer base growth and reach return on investment (ROI) sales revenue social media engagement website traffic.
2.2 Identify <i>global and customised approaches</i> for promotion of products or services	Global and customised approaches for promotion may relate to: <ul style="list-style-type: none"> culture demographics geography internet connectivity and access psychographics.
3.3 <i>Manage integration</i> of marketing, promotional and sales activities according to international marketing objectives	Managing integration may involve: <ul style="list-style-type: none"> coordinating resources and technology. defining clear and consistent program goals and objectives.
3.5 Provide progress and <i>other reports</i> according to event requirements	Other reports may include: <ul style="list-style-type: none"> marketing and research reports.



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BSBMKG625 Implement and manage international marketing programs

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Organisational policies and procedures</i> related to international marketing programs	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • ethical standards • privacy and confidentiality • quality processes and standards • storage, security and access • work health and safety (WHS).
Provisions of <i>legislation, codes of practice and standards</i> for international marketing programs	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Codes of practice and standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>KPIs</i> for international marketing programs	<p>KPIs may relate to:</p> <ul style="list-style-type: none"> • customer base growth and reach • return on investment (ROI) • sales revenue • social media engagement • website traffic.
Common international <i>marketing strategies and approaches</i>	<p>Marketing strategies may relate to:</p> <ul style="list-style-type: none"> • distribution channels • low costs of production • product and service differentiation (e.g. features) • product range and mix. <p>Marketing approaches may include:</p> <ul style="list-style-type: none"> • customisations • e-marketing • product and promotion adaptations • segmentations.
<i>Risk factors and mitigation strategies</i> for international marketing opportunities	<p>Risks factors may include:</p> <ul style="list-style-type: none"> • business operations • competitors • internal environment • macro and micro environments • threats identified in SWOT analysis. <p>Mitigation strategies may include:</p> <ul style="list-style-type: none"> • contingency planning • developing risk mitigation plans • risk monitoring.
<i>Processes for implementing an international marketing plan</i>	<p>Processes for implementing an international marketing plan may include:</p> <ul style="list-style-type: none"> • communicating potential legal and ethical impacts • developing long-term and short-term business goals.



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BSBMKG626 Develop advertising campaigns

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>campaign objectives</i> according to time, budget, product and <i>market factors</i>	<p>Campaign objectives may include:</p> <ul style="list-style-type: none"> changing attitudes, beliefs and behaviours increasing brand, product and service awareness. <p>Market factors may include:</p> <ul style="list-style-type: none"> economic factors political and legal factors social and cultural factors.
1.3 Verify with <i>relevant stakeholders</i> campaign objectives taking into consideration factors which may affect consumer responses and <i>legal</i> and <i>ethical requirements</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers) internal stakeholders (e.g. marketing managers, brand and product managers, supervisors, website and technical developers). <p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003. <p>Ethical requirements may relate to:</p> <ul style="list-style-type: none"> ethical and industry standards organisational policies and procedures.
2.2 Assess and identify <i>resource requirements</i> for range of media options, creative and production services	<p>Resource requirements may relate to:</p> <ul style="list-style-type: none"> budgets and finances equipment and materials human capital specialists technology.



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BSBMKG626 Develop advertising campaigns

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Principles of effective advertising</i> for different markets	Principles of effective advertising may relate to: <ul style="list-style-type: none"> • branding • customers • online presence • packaging • positioning • pricing • products and services on offer • promotions.
<i>Ethical requirements</i> relevant to the advertising industry	Ethical requirements may relate to: <ul style="list-style-type: none"> • ethical and industry standards • organisational policies and procedures.
Principles and purposes of advertising, consumer behaviour, and <i>influences on buyer behaviour</i>	Influences on buyer behaviour may relate to: <ul style="list-style-type: none"> • personal factors (e.g. age, occupation, lifestyle) • psychological factors (e.g. motivation, perception, attitudes) • social and cultural factors (e.g. community, family, religion).
Provisions of relevant <i>legislation, codes of practice and national standards</i> affecting business operations	Legislation may include: <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. Codes of practice and national standards may include: <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
Assessment Conditions	Notes
<i>Business technology</i> for developing advertising campaigns	Business technology may include: <ul style="list-style-type: none"> • graphic design software • video editing software • voiceover technology.



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BSBMKG627 Execute advertising campaigns

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop plan for advertising campaign according to <i>organisational, legal and ethical requirements</i>	<p>Organisational and ethical requirements may relate to:</p> <ul style="list-style-type: none"> ethical standards privacy and confidentiality quality processes and standards storage, security and access work health and safety (WHS). <p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Competition and Consumer Act 2010 Privacy Act 1988 Spam Act 2003.
2.1 Organise and brief required <i>resources</i> for implementation of advertising campaign according to legal requirements	<p>Resources may include:</p> <ul style="list-style-type: none"> external resources (e.g. clients, suppliers, outsourced specialists) internal stakeholders (e.g. marketing managers, brand and product managers, website and technical developers, team members).
2.3 Develop <i>processes to support relevant personnel</i> to fulfil implementation requirements	<p>Processes to support relevant personnel may include:</p> <ul style="list-style-type: none"> coaching and mentoring training.
3.1 <i>Review performance of campaign</i> at allocated campaign points according to task requirements, legal and ethical requirements	<p>Reviewing performance of campaigns may relate to:</p> <ul style="list-style-type: none"> customer base growth and reach return on investment (ROI) sales revenue website traffic.
Foundation Skills	Notes
Reading: Analyses and interprets a range of familiar industry information and <i>complex legal texts</i>	Complex legal texts may include those listed under 'legal requirements' above.
Technology: Selects and uses appropriate <i>digital tools and measurement systems</i> to perform complex analytical tasks	Digital tools and measurement systems may include: <ul style="list-style-type: none"> spreadsheets.
Performance Evidence	Notes
Establish <i>processes required to implement advertising campaign</i>	Processes required to implement advertising campaigns may include: <ul style="list-style-type: none"> developing schedule calendars identifying activity objectives, resource requirements, measurement tools and metrics monitoring and evaluating progress against timelines sign off and approvals.



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BSBMKG627 Execute advertising campaigns**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	BSBSS00116 Campaign Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Media pricing policies and contractual considerations</i>	Media pricing policies may relate to: <ul style="list-style-type: none"> • concessions • incentives • discounts • guarantees.
<i>Principles of advertising</i>	Principles of advertising may relate to: <ul style="list-style-type: none"> • branding • customers • online presence • packaging • positioning • pricing • products and services on offer • promotions.
<i>Print, television, film, video production processes</i>	Print, television, film, video production processes may include: <ul style="list-style-type: none"> • editing • distributing • marketing • printing • reviewing and approving.
<i>Legal and ethical requirements, code of practice and national standards relating to executing advertising campaigns</i>	Legal requirements may relate to: <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. Ethical requirements may relate to: <ul style="list-style-type: none"> • ethical and industry standards • organisational policies and procedures. Codes of practice and national standards may include: <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.
<i>Specifications in advertising briefs</i>	Specifications in advertising briefs may relate to: <ul style="list-style-type: none"> • distribution channels • product purpose • target audience.
Assessment Conditions	Notes
<i>Technology and software for execution of advertising campaigns</i>	Technology and software may include: <ul style="list-style-type: none"> • graphic design software • radio • social media • television • video editing software • voiceover technology.



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BSBMKG628 Lead organisational public relations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60520 Advanced Diploma of Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Review existing organisational public relations policies and procedures according to <i>legislative, ethical and organisational requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Ethical and organisational requirements may relate to:</p> <ul style="list-style-type: none"> • ethical standards • privacy and confidentiality • quality processes and standards • storage, security and access • work health and safety (WHS).
1.5 Address best practice in consultation with <i>relevant stakeholders</i> according to organisational policies and procedures	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. clients, suppliers) • internal stakeholders (e.g. marketing managers, brand and product managers, supervisors, website and technical developers).
Knowledge Evidence	Notes
<i>Principles and theories of public relations</i>	<p>Principles and theories of public relations may relate to:</p> <ul style="list-style-type: none"> • improving relationships • increasing public support • managing reputation.
<i>Best practice in public relations</i>	<p>Best practice in public relations may relate to:</p> <ul style="list-style-type: none"> • communication styles and theories • media relations • target audiences.
Key provisions of relevant <i>legislation, codes of practice and national standards</i> that affect public relations campaigns	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • Privacy Act 1988 • Spam Act 2003. <p>Codes of practice and national standards may include:</p> <ul style="list-style-type: none"> • industry standards • organisational and industry codes of practice.



Business Operations

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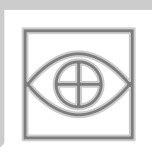
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Business Operations Unit Sector Overview

The Business Operations (OPS) unit sector incorporates units of competency aimed at supporting individuals in a range of industries and job roles to develop skills to coordinate and manage business resources, risks, stakeholders and operational plans. These operational functions support the administration of an organisation to produce the greatest level of effectiveness and efficiency in its core areas of focus.

These skills are applicable to job roles across industries and sectors, including contact centre team manager, administrative assistant, business operations manager, library assistant, and human resources business partner.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Business Operations Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Business Operations' unit stream, please refer to the interpretation guidance provided on pages 378 - 410. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBOPS101 Use business resources**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB10120 Certificate I in Workplace Skills	N/A
Skill sets	BSBSS00124 Workplace IT Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>business resources</i> according to task requirements	<p>Business resources may include:</p> <ul style="list-style-type: none"> • consumables • equipment • human capital • organisational documentation • technology. <p>Business resources may depend on the region and organisation.</p>
2.3 Report issues outside area of own responsibility to <i>appropriate personnel</i>	<p>Appropriate personnel may include:</p> <ul style="list-style-type: none"> • colleagues • human resources (HR) officers • mentors • supervisors • team leaders • work health and safety (WHS) officers.
Foundation Skills	Notes
Self-management: Follows <i>organisational procedures</i> when tasks are beyond own level of responsibility	<p>Organisational procedures may include:</p> <ul style="list-style-type: none"> • workflow charts. <p>Organisational procedures may depend on the organisation and should be clarified with supervisors before tasks are undertaken.</p>
Knowledge Evidence	Notes
<i>Procedures for operating</i> the available business resources, including safely requirements	<p>Procedures for operating may relate to:</p> <ul style="list-style-type: none"> • communication • flow charts • mandatory personal protective equipment (PPE) • organisational and industry codes of practice • organisational checklists • reporting procedures • storage, security and access.
Assessment Conditions	Notes
<i>Operational and maintenance manuals</i>	<p>Operational and maintenance manuals may relate to:</p> <ul style="list-style-type: none"> • cleaning and basic housekeeping • organisational checklists • point of sale processes • storage, security and access procedures.



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BSBOPS201 Work effectively in business environments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>organisational requirements and responsibilities</i> and confirm understanding with relevant personnel	<p>Organisational requirements and responsibilities may relate to:</p> <ul style="list-style-type: none"> communications (e.g. internet and emails) customer service cyber security social media. <p>Organisational requirements and responsibilities may be stated in job descriptions, standard operating procedures, organisational policies and procedures and codes of conduct.</p>
1.4 Identify and distinguish between <i>roles and responsibilities of staff</i> within organisational structure	<p>Roles and responsibilities of staff may depend on:</p> <ul style="list-style-type: none"> chain of command job descriptions standard operating procedures.
2.2 Communicate and collaborate with <i>relevant personnel</i> in a courteous and non discriminatory manner	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. government agencies, unions, suppliers, customers) internal stakeholders (e.g. supervisors, team leaders, managers, colleagues).
3.2 Apply <i>time management strategies</i> to work duties	<p>Time management strategies may include:</p> <ul style="list-style-type: none"> clarifying tasks with supervisor identifying relevant timeframes for completion of tasks and milestones for review prioritising tasks using to-do lists and electronic calendars for scheduling tasks.
3.4 Seek and act upon feedback from <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. government agencies, unions, suppliers, customers) internal stakeholders (e.g. supervisors, team leaders, managers, colleagues).

Foundation Skills	Notes
Reading: Reviews <i>documentation</i> to identify relevant information for requirements of job role and organisation	<p>Documentation may include:</p> <ul style="list-style-type: none"> job descriptions operation manuals organisational policies and procedures (e.g. legal and ethical requirements) organisational vision, mission and value statements style guides.
Enterprise and initiative: Identifies <i>organisational expectations</i> and follows explicit protocols and procedures	<p>Organisational expectations may relate to:</p> <ul style="list-style-type: none"> communication etiquette organisational and industry codes of conduct organisational policies and procedures (e.g. diversity) standard operating procedures.



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BSBOPS201 Work effectively in business environments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Comply with <i>legal responsibilities</i> , and organisational requirements	<p>Legal responsibilities may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Copyright Act 1968 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
Knowledge Evidence	Notes
<i>Organisational policies and procedures</i> that apply to employer and employee rights in a business environment	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> employee contracts job descriptions onboarding and orientation induction procedures standing operating procedures.
<i>Roles, responsibilities and conditions of employment contract</i> for own work role.	<p>Roles, responsibilities and conditions of employment contracts should be stated in the enterprise agreement.</p>
Assessment Conditions	Notes
<i>Codes of practice</i> relevant to performance evidence	<p>Codes of practice may be enforced by state or federal legislation (e.g. WHS).</p>
<i>Workplace documentation and resources</i>	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> organisational policies and procedures.



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BSBOPS202 Engage with customers

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>personal targets and key performance indicators (KPIs)</i> for customer engagement according to organisational policy and procedures	<p>Personal targets and key performance indicators (KPIs) may relate to:</p> <ul style="list-style-type: none"> client and customer feedback customer service standards and strategies (e.g. addressing customer issues within a particular time frame) job descriptions marketing and communication policies and procedures personal development plans.
1.3 Identify options to meet customer expectations according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> customer complaints customer engagement escalation stock handling telephone use.
Foundation Skills	Notes
Reading: Identifies and evaluates a range of <i>texts</i> to determine product information, performance standards and guidelines, and business requirements	<p>Texts may include:</p> <ul style="list-style-type: none"> advertising materials catalogues guarantees legislation (e.g. work health and safety [WHS]) operation manuals organisational policies and procedures returns policies warranties.
Technology: Identifies key features of common <i>digital systems and tools</i> and operates them effectively to manage customer communication	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> digital communications tools (e.g. emails, chat functions, teleconferencing) help menus and assistance applications word processing tools.
Performance Evidence	Notes
Providing customer service according to <i>organisational standards and guidelines</i>	<p>Organisational standards and guidelines may relate to:</p> <ul style="list-style-type: none"> customer complaints customer engagement escalation processes returns policies telephone use procedures.



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BSBOPS202 Engage with customers**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Sources of information</i> to develop customer service skills including relevant organisational personnel	Sources of information may include: <ul style="list-style-type: none"> customer feedback surveys internal stakeholders (e.g. managers, colleagues, supervisors, team leaders, human resources [HR], marketing) organisational policies and procedures professional development programs and training.
<i>Procedures for the operation of telecommunication equipment and systems</i> , relevant to customer service.	Procedures for the operation of telecommunication equipment and systems may relate to: <ul style="list-style-type: none"> help menus problem-solving use and maintenance vendor operations.
Assessment Conditions	Notes
<i>Workplace information and data</i>	Workplace information and data may be sourced from: <ul style="list-style-type: none"> customer feedback and complaints organisational policies and procedures.
<i>Customer engagement policies and procedures</i>	Customer engagement policies and procedures may relate to: <ul style="list-style-type: none"> customer complaints escalation processes returns policies telephone use procedures.



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BSBOPS203 Deliver a service to customers**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Greet customers according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> • answering the telephone • email signatures • managing complaints • responding to requests for information • work instructions.
Foundation Skills	Notes
Reading: Identifies requirements from <i>organisational policy and procedure documents</i>	Organisational policy and procedure documents may relate to: <ul style="list-style-type: none"> • customer complaints • customer engagement • escalation processes • stock handling processes • telephone use procedures.
Knowledge Evidence	Notes
Key provisions of <i>customer service legislation and consumer law</i>	Customer service legislation and consumer law may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Australian Competition and Consumer Commission (ACCC) • Fairtrade • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988 • rights and guarantees.
<i>Workplace organisational policies and procedures</i> relating to customer service and the customer service process.	Workplace organisational policies and procedures may relate to: <ul style="list-style-type: none"> • customer complaints • customer engagement • escalation processes • stock handling processes • telephone use procedures.



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BSBOPS301 Maintain business resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Obtain <i>resources</i> according to timelines and identified organisational requirements	<p>Resources may include:</p> <ul style="list-style-type: none"> • consumables • equipment • human capital • organisational documentation • technology. <p>Resources may depend on the region and organisation.</p>
2.2 Store resources according to identified <i>organisational requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • safe use and disposal • stock handling processes • storage, security and access • work health and safety (WHS).
3.1 Confirm handling of resources is according to <i>organisational and work health and safety requirements</i>	<p>Organisational and work health and safety requirements may relate to:</p> <ul style="list-style-type: none"> • safe use and disposal • storage, security and access • technical specifications.
3.3 Consult <i>individuals and teams</i> and facilitate effective decision-making on the appropriate allocation of resources	<p>Individuals and teams may include:</p> <ul style="list-style-type: none"> • managers • team leaders. <p>Consulting individuals and teams may include seeking authorisation on the allocation of resources.</p>

Foundation Skills	Notes
Reading: Identifies and interprets information from a range of <i>sources</i> , including organisational policies and procedures	<p>Sources may include:</p> <ul style="list-style-type: none"> • operation manuals • organisational and industry codes of conduct • standard operating procedures.
Numeracy: Selects and uses appropriate <i>tools</i> to aid with estimation and other resource assessment requirements	<p>Tools may include:</p> <ul style="list-style-type: none"> • budgeting tools • digital planning tools • organisational templates • procurement policies • use-by dates (e.g. medical).
Technology: Identifies purpose and some specific functions of some common <i>digital tools</i> used in work contexts	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • digital communication tools (e.g. emails, chat functions, teleconferencing) • help menus and assistance applications • word processing tools.



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BSBOPS301 Maintain business resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of <i>legislation</i> relating to maintaining business resources	Legislation may relate to: <ul style="list-style-type: none">local, state and territory WHS legislationPrivacy Act 1988.



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BSBOPS302 Identify business risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify potential business risks according to <i>task requirements</i>	Task requirements may be stated in job descriptions.
1.3 Identify <i>organisational personnel</i> involved in addressing relevant risk types	Organisational personnel may include: <ul style="list-style-type: none"> managers supervisors team leaders work health and safety (WHS) officers.
Foundation Skills	Notes
Initiative and enterprise: Follows <i>legal and regulatory responsibilities</i> and organisational policies and procedures in relation to risk mitigation role	Legal and regulatory responsibilities may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory WHS legislation Privacy Act 1988. <p>Legal and regulatory responsibilities may depend on the nature of the risk.</p>
Technology: Uses <i>technology</i> to access and filter data and then extract, organise, integrate and share information	Technology may include: <ul style="list-style-type: none"> cloud-based digital applications data analytics tools databases internet research spreadsheets word processing tools.
Performance Evidence	Notes
Participate in discussions to minimise future risks in consultation with <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> managers supervisors team leaders work health and safety (WHS) officers.
Knowledge Evidence	Notes
Common <i>sources of business risk</i>	Sources of business risk may relate to: <ul style="list-style-type: none"> brand competitors compliance cyber security finances skill and knowledge gaps.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> for business risks	Workplace documentation and resources may include: <ul style="list-style-type: none"> organisational policies and procedures.



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BSBOPS303 Organise schedules

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify organisational requirements and protocols for <i>staff planning tools</i>	Staff planning tools may include: <ul style="list-style-type: none"> digital and paper-based calendars, diaries and rosters.
1.2 Identify <i>organisational procedures</i> for different types of appointments	Organisational procedures may relate to: <ul style="list-style-type: none"> recurring appointments and reminders supervisor requests travel times work health and safety (WHS) appointments.
1.5 Develop appointment schedule and priorities and clarify in discussion with <i>individual personnel</i>	Individual personnel may include: <ul style="list-style-type: none"> executive assistants directors managers partners.
Foundation Skills	Notes
Reading: Interprets textual information from a range of <i>sources</i> and identifies relevant information	Sources may include: <ul style="list-style-type: none"> legislation (e.g. anti-discrimination, WHS) organisational and industry codes of conduct organisational policies and procedures.
Performance Evidence	Notes
Record appointments according to <i>organisational policy and procedures</i>	Organisational policy and procedures may relate to: <ul style="list-style-type: none"> anti-discrimination privacy and confidentiality WHS.
Knowledge Evidence	Notes
Range of <i>appointment scheduling systems</i> and their features that could be used when organising schedules	Appointment scheduling systems may include: <ul style="list-style-type: none"> digital and mobile devices (e.g. calendars, diaries, reminders, in-built SMS) manual systems (e.g. appointment books, desk diaries, wall planning charts, staff indicator boards).



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BSBOPS304 Deliver and monitor a service to customers

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30420 Certificate III in Library and Information Services	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00119 Customer Service Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify limitations in addressing customer needs and seek assistance from <i>designated individuals</i> , where required	<p>Designated individuals may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers) internal stakeholders (e.g. managers, supervisors, team leaders). <p>Organisational procedures should be followed in order to identify designated individuals.</p>
2.1 Provide service to meet identified customer needs according to <i>organisational</i> and <i>legislative requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> answering the telephone consumer protection email signatures managing complaints responding to requests for information. <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
3.1 Review customer satisfaction with service delivery using <i>verifiable evidence</i> according to organisational and legislative requirements	<p>Verifiable evidence may include:</p> <ul style="list-style-type: none"> customer surveys direct customer feedback repeat business returns and refunds data sales data.
Foundation Skills	Notes
Reading: Proofreads <i>texts</i> for clarity of meaning and accuracy of grammar and punctuation	<p>Texts may include:</p> <ul style="list-style-type: none"> customer complaints policies refunds and returns policies.
Writing: Completes responses to customer complaints in <i>required format</i>	<p>Required formats may relate to:</p> <ul style="list-style-type: none"> appropriately addressing customer complaints organisational policies and procedures organisational templates.
Planning and organising: Complies with <i>organisational policies and procedures</i> relevant to role	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> customer complaints customer engagement referral and escalation stock handling telephone use.



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BSBOPS304 Deliver and monitor a service to customers**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30420 Certificate III in Library and Information Services	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00119 Customer Service Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Customer service standards</i> and protocols for serving customers, including customers with specific needs	Customer service standards may relate to: <ul style="list-style-type: none"> • anti-discrimination • cultural and linguistic differences • diversity (e.g. gender, age, disabilities) • ethical principles • privacy • WHS.
Assessment Conditions	Notes
<i>Technology</i> required to gather and provide information and assistance to customers	Technology may include: <ul style="list-style-type: none"> • digital and mobile devices (e.g. online survey forms, complaint management systems, emails).



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BSBOPS305 Process customer complaints

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services
Skill sets	BSBSS00119 Customer Service Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Assess complaint according to <i>organisational policy</i>	Organisational policies may relate to: <ul style="list-style-type: none"> customer engagement escalation processes privacy and confidentiality stock handling processes telephone use procedures work health and safety (WHS).
1.2 Inform <i>relevant stakeholders</i> that complaint has been received	Relevant stakeholder may include: <ul style="list-style-type: none"> external stakeholders (e.g. suppliers) internal stakeholders (e.g. managers, supervisors).
1.3 Document customer complaints according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> customer engagement escalation organisational templates privacy and confidentiality.
3.4 Escalate matters for which a solution cannot be determined to <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> managers supervisors. <p>Relevant personnel may be determined by organisational policies and procedures.</p>

Foundation Skills	Notes
Reading: Identifies and interprets textual information to determine <i>legislative, regulatory and organisational requirements</i>	Legislative requirements may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Copyright Act 1968 local, state and territory WHS legislation Privacy Act 1988. Regulatory and organisational requirements may relate to: <ul style="list-style-type: none"> customer engagement managing complaints responding to requests for information.
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks	Digital tools may include: <ul style="list-style-type: none"> digital and mobile devices (e.g. online survey forms, complaint management systems).



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BSBOPS305 Process customer complaints

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services
Skill sets	BSBSS00119 Customer Service Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of <i>legislation</i> relating to customers including Australian Consumer Law and consumer guarantees	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Copyright Act 1968 • local, state and territory WHS legislation • Privacy Act 1988.



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BSBOPS306 Record stakeholder interactions**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services BSB40120 Certificate IV in Business BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify <i>organisational policies and procedures</i> and determine information to be included in record	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> customer engagement escalation processes organisational templates privacy and confidentiality.
2.1 Enter details of stakeholder interaction in required <i>CMS fields</i> according to organisational policies, procedures and protocols	CMS fields may include: <ul style="list-style-type: none"> location name time.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i>	Textual information may include: <ul style="list-style-type: none"> customer feedback customer service policies and procedures key performance indicators (KPIs) legislation manuals standard operating procedures.
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks	Digital tools may include: <ul style="list-style-type: none"> digital communication tools (e.g. emails, chat functions teleconferencing) help menus and assistance applications word processing tools.



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BSBOPS401 Coordinate business resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40920 Certificate IV in Project Management Practice
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Create opportunities for individuals and workgroups to contribute to the <i>identification of resource requirements</i>	Resource requirements may be identified from: <ul style="list-style-type: none"> online forms stocktake.
4.1 Implement improvements in resource planning according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> safe use and disposal stock handling processes storage, security and access work health and safety (WHS).
Foundation Skills	Notes
Technology: Utilises a range of features within <i>digital applications</i> to access, store and share information	Digital applications may include: <ul style="list-style-type: none"> cloud-based storage systems databases digital communication tools (e.g. emails).
Knowledge Evidence	Notes
Functions of common <i>business resources</i> used in an organisation, including, organisational policies, plans and procedures in relation to business resource acquisition and monitoring	Business resources may include: <ul style="list-style-type: none"> consumables equipment human capital organisational documentation technology.
<i>Methods for analysing and incorporating feedback</i> on effectiveness resource planning, monitoring resource use	Methods for analysing and incorporating feedback may relate to: <ul style="list-style-type: none"> customer surveys finance reporting group interviews over and under utilisation of resources sales data.
Assessment Conditions	Notes
<i>Records</i> concerning equipment and resource purchases	Records may relate to: <ul style="list-style-type: none"> inventory maintenance logs stocktake.



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BSBOPS402 Coordinate business operational plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40520 Certificate IV in Leadership and Management	BSB40120 Certificate IV in Business
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult with stakeholders to identify <i>resource requirements</i> relevant to operational plan	Resource requirements may relate to: <ul style="list-style-type: none"> digital tools and technologies employees equipment.
3.2 Identify and use <i>key performance indicators (KPIs)</i> and assess operational performance	Key performance indicators (KPIs) may relate to: <ul style="list-style-type: none"> job descriptions operational plans organisational strategic planning documents personal development plans.
4.3 Maintain records related to operational performance according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> escalation processes organisational templates privacy storage, security and access.
Foundation Skills	Notes
Reading: Identifies, interprets, analyses and reviews <i>textual information</i> related to the operational plan and monitoring of operational performance	Textual information may include: <ul style="list-style-type: none"> KPIs legislation manuals standard operating procedures.
Knowledge Evidence	Notes
<i>Processes</i> to identify resource requirements	Processes should be identified within project plan approach.
Key features of <i>performance monitoring systems and processes</i>	Performance monitoring systems and processes according to organisational requirements.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> including budgets	Workplace documentation and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBOPS403 Apply business risk management processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Document identified risks according to relevant <i>policies, procedures, legislation and standards</i>	Policies, procedures, legislation and standards may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
2.1 Analyse risks in consultation with <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> managers supervisors team leaders WHS officers.
3.3 Refer risks to <i>relevant personnel</i> , where required, according to policies and procedures	Relevant personnel may include: <ul style="list-style-type: none"> managers supervisors team leaders WHS officers.
Foundation Skills	Notes
Reading: Comprehends documents and <i>texts</i> of varying complexity to extract and analyse relevant information	Texts may include: <ul style="list-style-type: none"> legislation organisational policies and procedures.
Numeracy: Uses <i>numerical tools</i> to assess risk and uses numerical data to review plans	Numerical tools may include: <ul style="list-style-type: none"> bank statements budgets cash flows financial plans gant charts workforce planning data.
Technology: Uses familiar <i>digital technologies and systems</i> to access information, prepare plans and communicate with others	Digital technologies and systems may include: <ul style="list-style-type: none"> cloud-based applications customer relationship management (CRM) databases virtual meeting technology.



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BSBOPS403 Apply business risk management processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00100 Business Operations Support Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Areas where risks are commonly identified</i> in an organisation	Areas where risks are commonly identified may include: <ul style="list-style-type: none"> operational implementation outsourcing and contracting resourcing safety systems and processes.
Assessment Conditions	Notes
<i>Workplace documentation</i> on selected organisational risks	Workplace documentation may include: <ul style="list-style-type: none"> manuals organisational templates.



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BSBOPS404 Implement customer service strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Develop options to improve customer service delivery according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> answering the telephone email signatures managing complaints responding to requests for information.
2.1 Consult with <i>relevant stakeholders</i> to develop customer service strategies	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. customers, suppliers) internal stakeholders (e.g. managers, supervisors, team leaders).
Foundation Skills	Notes
Reading: Reviews <i>textual information</i> and comprehends details that relate to the interests or requirements of the client and organisation	Textual information may include: <ul style="list-style-type: none"> key performance indicators (KPIs) legislation manuals organisational policies and procedures standard operating procedures.
Teamwork: Uses a range of <i>strategies</i> to establish a sense of connection and build rapport with customers	Strategies may include: <ul style="list-style-type: none"> researching customer base using cross-cultural communication techniques.
Technology: Uses <i>digital technologies</i> to access, organise, present and store information relevant to own role	Digital technologies may include: <ul style="list-style-type: none"> cloud-based applications customer relationship management (CRM) databases virtual meeting technology word processing tools.
Performance Evidence	Notes
Consult and communicate effectively with <i>relevant people</i>	Relevant people may include: <ul style="list-style-type: none"> external stakeholders (e.g. customers, suppliers) internal stakeholders (e.g. managers, supervisors, team leaders).



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BSBOPS404 Implement customer service strategies**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40720 Certificate IV in Library and Information Services	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Sources of verified client information</i>	Sources may include: <ul style="list-style-type: none"> • CRM databases • sales data.
<i>Organisational business structure, products and services related to customer service</i>	Organisational business structure may relate to: <ul style="list-style-type: none"> • anti-discrimination • customer engagement • work health and safety (WHS).
<i>Product and service standards and best practice models</i>	Product and service standards may relate to: <ul style="list-style-type: none"> • organisational policies and procedures • organisational vision, mission and values.
Assessment Conditions	Notes
<i>Client satisfaction data</i>	Client satisfaction data may relate to: <ul style="list-style-type: none"> • complaints • feedback surveys • repeat business.



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BSBOPS405 Organise business meetings

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and comply with <i>legal, ethical and organisational requirements</i> for business meetings	Legal, ethical and organisational requirements may relate to: <ul style="list-style-type: none"> meeting conventions organisational and industry codes of conduct.
2.3 Review minutes for accuracy and submit for approval by the <i>nominated person</i>	Nominated person may include: <ul style="list-style-type: none"> meeting chairperson.
Foundation Skills	Notes
Reading: Identifies and interprets information from instructions, <i>organisational policies and procedures, or legislation</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> client engagement escalation processes organisational templates. Legislation may include: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
Technology: Understands the purposes, specific functions and key features of common <i>digital systems and tools</i> and operates them effectively to complete routine tasks	Digital systems and tools may include: <ul style="list-style-type: none"> cloud-based applications digital communication tools (e.g. emails, chat functions, teleconferencing) help menus and assistance applications word processing tools.
Knowledge Evidence	Notes
Relevant <i>communication techniques</i>	Communication techniques may relate to: <ul style="list-style-type: none"> digital communication timelines verbal communication visuals written communication.



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BSBOPS406 Participate in organisational governance**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.4 Follow <i>confidentiality policies, procedures and requirements</i>	Confidentiality policies, procedures and requirements may relate to: <ul style="list-style-type: none"> Organisational policies, procedures and requirements Requirements stipulated under legislation (e.g. Privacy Act 1988).
3.1 Comply with <i>legislative requirements</i> that apply to organisational governance duties	Legislative requirements may include: <ul style="list-style-type: none"> Public Governance, Performance and Accountability Act 2013.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>information</i> relating to core functions of the organisation, such as organisational goals, standards and values	Information may relate to: <ul style="list-style-type: none"> organisational culture organisational vision, mission and value statements strategic and operational plans.
Teamwork: Collaborates with <i>others</i> to achieve joint outcomes, playing an active role in facilitating group interaction, influencing direction and taking a leadership role on occasion	Others may include: <ul style="list-style-type: none"> senior management team members.
Performance Evidence	Notes
Managing <i>conflicts of interest</i>	Conflicts of interest may relate to: <ul style="list-style-type: none"> personal and professional relationships.
Knowledge Evidence	Notes
<i>Confidentiality requirements</i> related to organisational governance	Confidentiality requirements may relate to: <ul style="list-style-type: none"> Organisational policies, procedures and requirements Requirements stipulated under legislation (e.g. Privacy Act 1988).
Relevant <i>corporation laws</i> related to funding agreements	Corporation laws may include: <ul style="list-style-type: none"> Corporations Act 2001.
<i>Decision-making techniques</i>	Decision-making techniques may include: <ul style="list-style-type: none"> consultation cost-benefit analysis.



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BSBOPS501 Manage business resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management
Skill sets	BSBSS00101 Business Operations Management Skill Set BSBSS00115 Copyright Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult with <i>relevant stakeholders</i> and determine the nature and level of resources required	Relevant stakeholders may include: <ul style="list-style-type: none"> managers team leaders.
3.1 Identify and adhere to <i>organisational policies and procedures</i> for resource allocation	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> safe use and disposal storage, security and access work health and safety (WHS).
3.4 Develop and implement <i>systems for monitoring resource usage</i>	Systems for monitoring resource usage should be stated in project planning approach.
Foundation Skills	Notes
Reading: Interprets <i>textual information</i> including legislation and organisational policy, to plan, implement and review resource requirements	Textual information may include: <ul style="list-style-type: none"> key performance indicators (KPIs) manuals standard operating procedures.
Oral communication: Participates in spoken exchanges with <i>stakeholders</i> using structure and language appropriate to context and audience	Stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. suppliers, customers) internal stakeholders (e.g. managers, team leaders).
Teamwork: Collaborates and negotiates with <i>others</i> to achieve required outcomes	Others may include: <ul style="list-style-type: none"> external stakeholders (e.g. suppliers, customers) internal stakeholders (e.g. managers, team leaders).
Knowledge Evidence	Notes
<i>Legislative and regulatory context</i> of the organisation in relation to managing resources	Legislative and regulatory context may relate to: <ul style="list-style-type: none"> applicable federal and state/territory WHS legislation Privacy Act 1988.
Key elements and <i>sources of information</i> required to monitor usage of: <ul style="list-style-type: none"> physical resources human resources 	Sources of information may include: <ul style="list-style-type: none"> finance reports sales data stocktake.



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BSBOPS502 Manage business operational plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop operational plan in consultation with, and with approval from, <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> managers team leaders.
2.2 Confirm that physical resources and services are acquired according to the <i>organisation's policies, practices and procedures</i>	Organisation's policies, practices and procedures may relate to: <ul style="list-style-type: none"> stock handling processes work health and safety (WHS).
2.3 Identify and incorporate requirements for <i>intellectual property rights and responsibilities</i> related to acquisition of resources	Intellectual property rights and responsibilities may relate to: <ul style="list-style-type: none"> copyright licensing referencing.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>workplace documentation</i> to determine requirements for the operational plan	Workplace documentation may include: <ul style="list-style-type: none"> manuals organisational templates standard operating procedures.
Writing: Develops and documents a range of <i>detailed texts</i> relating to the management of an operational plan according to organisational requirements	Detailed texts may include: <ul style="list-style-type: none"> reports strategic plans.
Teamwork: Collaborates with <i>others</i> to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion	Others may include: <ul style="list-style-type: none"> external stakeholders (e.g. suppliers, customers) internal stakeholders (e.g. colleagues, managers, team leaders).
Technology: Demonstrates awareness of the importance of <i>data security</i> in a digital environment	Data security may relate to: <ul style="list-style-type: none"> copyright safe use and disposal storage, security and access.
Knowledge Evidence	Notes
<i>Approaches</i> for developing key performance indicators to meet business objectives	Approaches may include: <ul style="list-style-type: none"> analysing current performance reviewing business objectives.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBOPS503 Develop administrative systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult with <i>stakeholders</i> and verify identified requirements and modifications	Stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. developers, suppliers) internal stakeholders (e.g. senior management).
1.4 Select supplier or developer according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> procurement.
3.2 Modify system to meet changing needs according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> compliance information and communications technology productivity.
Foundation Skills	Notes
Writing: Creates <i>instructional texts</i> using grammatical structures and vocabulary appropriate to audience and context	Instructional texts may include: <ul style="list-style-type: none"> flow charts organisational policies and procedures quick reference guides training plans.
Teamwork: Collaborates with <i>others</i> to achieve joint outcomes, providing guidance to others where necessary	Others may include: <ul style="list-style-type: none"> communities of practice customers developers suppliers.
Technology: Uses and <i>investigates new digital technologies and applications</i> to manage and manipulate data	Investigating may involve: <ul style="list-style-type: none"> attending conferences conducting market research consulting with business network groups and associations. New digital technologies and applications may include: <ul style="list-style-type: none"> cloud-based applications customer relationship management (CRM) databases. <p>New digital technologies and applications may depend on the industry.</p>
Technology: Demonstrates awareness of the importance of <i>data security</i> in a digital environment	Data security may relate to: <ul style="list-style-type: none"> copyright safe use and disposal storage, security and access.



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BSBOPS503 Develop administrative systems**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Work with <i>relevant personnel and stakeholders</i> to identify administrative system improvements	Relevant personnel and stakeholders may include: <ul style="list-style-type: none"> senior management.
Knowledge Evidence	Notes
<i>Legislative and organisational policies and procedures</i> for reviewing administrative systems	Legislative and organisational policies and procedures may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) escalation processes Privacy Act 1988.



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BSBOPS504 Manage business risk

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60320 Advanced Diploma of Human Resource Management
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 <i>Evaluate organisational processes, procedures and requirements</i> and determine scope for risk management process	<p>Evaluating may involve:</p> <ul style="list-style-type: none"> liaising with risk managers or risk management departments. <p>Organisational processes, procedures and requirements may relate to:</p> <ul style="list-style-type: none"> customer engagement escalations privacy security work health and safety (WHS).
4.3 Communicate risk management processes to <i>relevant parties</i>	<p>Relevant parties may include:</p> <ul style="list-style-type: none"> accreditation bodies auditors risk managers.
Foundation Skills	Notes
Reading: Synthesises a variety of relatively <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> legislation organisational and industry codes of practice regulations strategic plans.
Writing: Develops <i>textual material</i> and organises content in a manner that effectively documents risk management analysis and assessment priorities and processes	<p>Textual material may include:</p> <ul style="list-style-type: none"> risk assessment plans and documents.
Numeracy: Uses <i>numerical tools</i> to assess risk and uses numerical data to review plans	<p>Numerical tools may include:</p> <ul style="list-style-type: none"> bank statements budgets cash flows financial plans gant charts workforce planning data.
Technology: Uses <i>digital technologies and systems</i> to access information, document plans and communicate with others	<p>Digital technologies and systems may include:</p> <ul style="list-style-type: none"> cloud-based applications customer relationship management (CRM) databases virtual meeting technology.



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BSBOPS504 Manage business risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50320 Diploma of Human Resource Management	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60320 Advanced Diploma of Human Resource Management
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Consult and communicate with <i>stakeholders</i> to identify and assess risks, determine appropriate risk treatment actions and priorities and explain the risk management processes	Stakeholders may include: <ul style="list-style-type: none"> • competitors • customers • employees • industry groups • suppliers.
Knowledge Evidence	Notes
<i>Legislative and regulatory context</i> of the organisation in relation to risk management	Legislative and regulatory context may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • applicable federal and state/territory WHS legislation • Privacy Act 1988.
<i>Risk management process</i>	Risk management processes may relate to: <ul style="list-style-type: none"> • risk management standards (e.g. ISO 31000:2018).



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BSBOPS505 Manage organisational customer service

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify and procure resources required to address <i>customer service requirements</i>	Customer service requirements may relate to: <ul style="list-style-type: none"> organisational policies and procedures service level agreements.
2.1 Deliver product and service according to customer specifications within <i>organisation's business plan</i>	Organisation's business plans may relate to: <ul style="list-style-type: none"> customer service manuals standard operating procedures.
3.3 Adapt delivery of customer product and service in consultation with <i>relevant individuals and groups</i>	Relevant individuals and groups may include: <ul style="list-style-type: none"> external stakeholders (e.g. customers, suppliers) internal stakeholders (e.g. colleagues, managers).

Foundation Skills	Notes
Reading: Interprets and analyses textual information from a variety of <i>sources</i> and applies the knowledge that has been gained to evaluate standards for organisation's products and services	Sources may include: <ul style="list-style-type: none"> customer feedback customer service policies and procedures key performance indicators (KPIs) legislation standard operating procedures.
Writing: Produces a range of <i>text types</i> to convey information, requirements or recommendations matching style of writing to purpose and audience	Text types may include: <ul style="list-style-type: none"> presentations reports.
Technology: Uses <i>digital technology</i> to access, organise and present information in a format that meets requirements	Digital technology may include: <ul style="list-style-type: none"> cloud-based applications customer relationship management (CRM) databases spreadsheets virtual meeting technology word processing tools.

Performance Evidence	Notes
Identify and resolve <i>system problems</i> relating to poor customer service	System problems may relate to: <ul style="list-style-type: none"> access delivery timing product quality and specifications.



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BSBOPS505 Manage organisational customer service**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Legislative and regulatory frameworks</i> governing customer service	Legislative and regulatory frameworks may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • applicable federal and state/territory WHS legislation • Privacy Act 1988.
<i>Organisational policies and procedures</i> for customer service and handling customer complaints	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • conflict management and resolution • customer engagement • escalation processes • returns and refunds • warranties.



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BSBOPS601 Develop and implement business plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60520 Advanced Diploma of Marketing and Communication BSB80120 Graduate Diploma of Management (Learning)
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>organisational</i> and <i>legislative frameworks</i> relevant to development of a business plan	<p>Organisational frameworks may relate to:</p> <ul style="list-style-type: none"> customer service organisational policies and procedures standard operating procedures strategic goals and plans. <p>Legislative frameworks may relate to:</p> <ul style="list-style-type: none"> Fair Work Act 2009 applicable federal and state/territory WHS legislation Privacy Act 1988.
2.1 Communicate business plan to all <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> charity groups financers government agencies non-governmental organisations (NGOs) public and community groups shareholders.
Foundation Skills	Notes
Reading: Gathers, interprets and analyses <i>textual information</i> when developing the business plan and monitoring operational performance	<p>Textual information may relate to:</p> <ul style="list-style-type: none"> situational and environmental analysis.
Writing: Researches, plans and prepares business plan for <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> charity groups financers government agencies non-governmental organisations (NGOs) public and community groups shareholders.
Knowledge Evidence	Notes
<i>Performance objectives and measures</i> , including key results indicators	<p>Performance objectives and measures may include:</p> <ul style="list-style-type: none"> key performance areas (KPAs) key performance indicators (KPIs).



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BSBOPS602 Monitor corporate governance activities**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00114 Organisational Governance Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>corporate governance requirements, standards and practices</i> according to organisational requirements	Corporate governance requirements, standards and practices may relate to: <ul style="list-style-type: none"> • Australian Company Secretaries (ACS) • Australian Securities and Investments Commission (ASIC) • election requirements • office-bearers.
Foundation Skills	Notes
Reading: Sources and researches <i>textual information</i> in the context of organisational strategy and compliance requirements to support plans, monitoring and reporting	Textual information may include: <ul style="list-style-type: none"> • annual reports • legislation • organisational strategy documents • regulations.
Writing: Develops <i>complex texts</i> using specialised and detailed language to convey information, requirements and recommendations according to legal and organisational requirements	Complex texts may include: <ul style="list-style-type: none"> • briefings • legislation • organisational policies and procedures • reports.
Performance Evidence	Notes
Access and interpret <i>legislation</i> and regulations to identify corporate governance compliance requirements	Legislation may include: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • applicable federal and state/territory WHS legislation • Fair Work Act 2009 • Privacy Act 1988.
Meet <i>statutory reporting requirements</i>	Statutory reporting requirements may relate to: <ul style="list-style-type: none"> • annual general meetings (AGM) • company ownership • equal employment opportunity (EEO) • external auditor reports • financial reports • shareholder reports.



Personal Effectiveness

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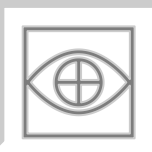
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Personal Effectiveness Unit Sector Overview

The Personal Effectiveness (PEF) unit sector incorporates units of competency aimed at supporting individuals in a variety of industries and job roles to develop skills that support their effectiveness in a work environment.

Personal effectiveness involves using techniques and available resources to maximise personal performance in order to contribute to business objectives. In a workplace context, personal effectiveness covers personal and professional development, and personal health and wellbeing, which supports performance and ongoing skill development.



Glossary of common terminology

Employee Assistance Programs (EAPs)

Employee Assistance Programs (EAPs) are a work-based intervention program designed to enhance emotional, mental and general psychosocial wellbeing of all employees.

Organisational policies

Organisational policies represent an overarching course of action adopted by an organisation.

Organisational procedures

Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Personal Effectiveness Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Personal Effectiveness' unit stream, please refer to the interpretation guidance provided on pages 413 - 425. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBPEF101 Plan and prepare for work readiness

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB10120 Certificate I in Workplace Skills	BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00125 Workplace Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 <i>Research methods</i> to acquire additional skills required	Research methods may relate to: <ul style="list-style-type: none"> internal and external procedures peer feedback simple web searches validating credibility of sources.
3.1 Identify types of <i>evidence required</i> to demonstrate competence in skills development	Evidence required may include: <ul style="list-style-type: none"> skill demonstrations external training portfolios references self-assessments work products (e.g. document samples).
Foundation Skills	Notes
Reading: Identifies <i>textual information</i> to determine requirements	Textual information may include: <ul style="list-style-type: none"> customer requests (e.g. letters, emails) job descriptions organisational procedures tasks sheets work instructions.
Performance Evidence	Notes
Seek advice from <i>relevant stakeholders</i> on: <ul style="list-style-type: none"> work and career options results of self-assessment preparation of portfolio 	Relevant stakeholders may include: <ul style="list-style-type: none"> mentors more experienced peers and colleagues supervisors trusted advisors (e.g. careers advisors).
Knowledge Evidence	Notes
<i>Sources of advice</i> on career planning and skill development	Sources of advice may include: <ul style="list-style-type: none"> career counsellors employment websites human resources (HR) National Careers Institute (NCI) organisational policies and procedures (e.g. promotions, merit selection processes) supervisors.



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BSBPEF101 Plan and prepare for work readiness

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB10120 Certificate I in Workplace Skills	BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00125 Workplace Foundations Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Workplace documentation and resources for career development</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> • portfolios • references • self-assessments • work products (e.g. document samples).



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BSBPEF201 Support personal wellbeing in the workplace**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>personal factors</i> that may impact on wellbeing	Personal factors may include: <ul style="list-style-type: none"> • cultural • educational • environmental • familial • financial • psychological.
1.2 Identify <i>workplace factors</i> that may impact on wellbeing	Workplace factors may include: <ul style="list-style-type: none"> • culture • empowerment and psychological safety • inclusion and diversity • job security • leadership • motivational strategies • organisational structure • recognitions • sickness in the workplace • social activities • wellbeing programs • work health and safety (WHS) • workloads.
2.2 Identify appropriate <i>method for communication</i> about wellbeing	Methods for communication may include: <ul style="list-style-type: none"> • following organisational communication policies and procedures • newsletters • one-on-one meetings with peers and supervisors • online assessments • safety shares • team meetings • toolbox talks.
4.2 Select appropriate <i>wellbeing resources</i> applicable to own workplace	Wellbeing resources may include: <ul style="list-style-type: none"> • Australian Human Resources Institute (AHRI) • counsellors • Employee Assistance Programs (EAP) • Employee Assistance Schemes (EAS) • online resources • support staff (e.g. human resources [HR], learning and development [L&D]) • WHS wardens and officers.



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BSBPEF201 Support personal wellbeing in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine job role and requirements	Textual information may include: <ul style="list-style-type: none"> • newsletters • toolbox talks • organisational policies and procedures.
Knowledge Evidence	Notes
<i>Key features</i> of Employee Assistance Programs (EAPs)	Key features may include: <ul style="list-style-type: none"> • access to counselling • confidentiality • support mechanisms • workplace wellness data.



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BSBPEF202 Plan and apply time management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Discuss and agree on work goals and plans with assistance from <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> human resources (HR) officers supervisors team leaders team members.
Foundation Skills	Notes
Reading: Identifies and interprets <i>textual information</i> to determine and adhere to organisational and task requirements	<p>Textual information may include:</p> <ul style="list-style-type: none"> diaries calendars strategic and operational organisational plans work plans.
Technology: Selects and uses appropriate <i>digital tools</i> to complete tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> calendars and diaries cloud-based applications handheld and mobile devices virtual meeting technology.
Knowledge Evidence	Notes
Time management <i>techniques and strategies</i>	<p>Techniques and strategies may include:</p> <ul style="list-style-type: none"> awareness of frameworks (e.g. Pomodoro, Eisenhower) delegating negotiating prioritising scheduling self-management (e.g. strategies to stop procrastinating, stress management) setting expectations to-do lists.
<i>Features</i> of a time management plan	<p>Features may include:</p> <ul style="list-style-type: none"> basic action plan contingency within scope of own job role deadlines.



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BSBPEF301 Organise personal work priorities**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Methods</i> to elicit, analyse and interpret feedback when communicating with other people in the workplace	Methods may include: <ul style="list-style-type: none"> customer and client feedback performance reviews research and data analysis (e.g. surveys, 360 review) self-assessments.
Assessment Conditions	Notes
<i>Challenges and situations</i> to demonstrate application of performance evidence	Challenges and situations may include: <ul style="list-style-type: none"> extenuating circumstances extraordinary events (e.g. natural disasters, disease) internal conflicting priorities limited access to resources and technology staff shortages urgency of requests.



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BSBPEF302 Develop self-awareness**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Create an <i>action plan</i> to develop self-awareness	Action plans may include: <ul style="list-style-type: none"> • benchmarking • identifying desired and gap states • prioritising • self-assessments • timeline considerations • training and development strategies.
Foundation Skills	Notes
Writing: Prepares <i>documents</i> to monitor and reflect on performance	Documents may include: <ul style="list-style-type: none"> • personal and professional development plans • reflection journals • self-assessments.
Knowledge Evidence	Notes
<i>Strategies and documentation</i> for a self-awareness action plan	Strategies and documentation may include: <ul style="list-style-type: none"> • benchmarking • identifying desired and gap states • prioritising • self-assessments • timeline considerations • training and development strategies.



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BSBPEF401 Manage personal health and wellbeing**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>factors in the work environment</i> that may impact on own physical and mental health	Factors in the work environment may include: <ul style="list-style-type: none"> ergonomics and manual handling infection control meeting needs and expectations of direct reports team leader expectations work health and safety (WHS).
1.4 Review <i>legislative and organisational policies and procedures</i> relating to health and wellbeing	Legislative and organisational policies and procedures may relate to: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory WHS legislation organisational and industry codes of conduct wellness frameworks work behavioural analysis.
Foundation Skills	Notes
Planning and organising: Uses <i>problem-solving techniques</i> to analyse and address issues that arise	Problem-solving techniques may include: <ul style="list-style-type: none"> brainstorming collaborating critical thinking fishbone analysis performance reviews root cause analysis.
Performance Evidence	Notes
<i>Locate</i> and assess applicable resources	Locating may include use of: <ul style="list-style-type: none"> external sources (e.g. internet, specialist) internal sources (e.g. intranet, internal policies). Assessing may relate to: <ul style="list-style-type: none"> identifying credible and verifiable sources (e.g. Australian Human Resources Institute [AHRI], peak industry bodies).



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BSBPEF401 Manage personal health and wellbeing**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Time management <i>tools and techniques</i>	Tools and techniques may include: <ul style="list-style-type: none"> use of applications on mobile devices that support health and wellbeing considering team time management.
Requirements under <i>work health and safety (WHS) legislation</i> to address workplace stress	Work health and safety (WHS) legislation may include: <ul style="list-style-type: none"> state regulator information and guidance (e.g. risk assessment and controls for stress management) terms and conditions of employment (e.g. awards).



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BSBPEF402 Develop personal work priorities**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40720 Certificate IV in Library and Information Services BSB40820 Certificate IV in Marketing and Communication BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Develop a <i>personal work schedule</i>	Personal work schedules may include: <ul style="list-style-type: none"> • daily tasks • delegating • key performance indicators (KPIs) • monitoring and reviewing • prioritising • project planning • reflecting on job requirements and job description • reporting • timelines and deadlines.
2.1 Communicate personal work schedule to <i>relevant personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> • human resources (HR) officers • supervisors • team leaders • team members.
Foundation Skills	Notes
Writing: Prepares <i>written reports and workplace documentation</i> that communicate complex information clearly and effectively	Written reports and workplace documentation may include: <ul style="list-style-type: none"> • reports for achieving goals • team management reports • timelines • work schedules.
Numeracy: Analyses <i>numerical information</i> related work accountabilities	Numerical information may include: <ul style="list-style-type: none"> • recording time spent at work, including overtime and absenteeism • time management data • work schedule time allocations.
Knowledge Evidence	Notes
<i>Business technology applications</i> to schedule tasks and plan work	Business technology applications may include: <ul style="list-style-type: none"> • intranet • scheduling software • spreadsheets • word processing tools.



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BSBPEF403 Lead personal development**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Create a <i>self-regulation management plan</i> according to organisational policy	Self-regulation management plans may include: <ul style="list-style-type: none"> • behavioural and emotional self-regulation • communication techniques • delegating • negotiating • prioritising • reflective practice • setting goals • time and stress management.
Foundation Skills	Notes
Writing: Develops <i>texts</i> dealing with complex ideas and concepts using specialised and detailed language to convey explicit information regarding personal development	Texts may include: <ul style="list-style-type: none"> • organisational charts • performance appraisal documents • reports for achieving goals • team management reports • timelines • work schedules.
Performance Evidence	Notes
<i>Research</i> and plan opportunities for own personal development	Research may include: <ul style="list-style-type: none"> • career progression pathways and plans • external and internal training • higher duty opportunities • industry bodies and networks • key performance indicators (KPIs) • shadowing • succession planning.
Knowledge Evidence	Notes
<i>Interpersonal skill concepts</i>	Interpersonal skill concepts may include: <ul style="list-style-type: none"> • advocacy • conflict resolution and management • cross-cultural communication • effective listening techniques • emotional intelligence (EI) • empathy • leadership • resilience • self-awareness • self-management • self-regulation.



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BSBPEF501 Manage personal and professional development

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management BSB50520 Diploma of Library and Information Services BSB50620 Diploma of Marketing and Communication BSB50720 Diploma of Paralegal Services BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB60120 Advanced Diploma of Business BSB60220 Advanced Diploma of Conveyancing BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Use <i>technology</i> to manage work priorities of the team	Technology may include: <ul style="list-style-type: none"> cloud-based computing applications shared calendars virtual meeting technology.
3.2 Seek feedback from <i>relevant personnel</i> on own development needs	Relevant personnel may include: <ul style="list-style-type: none"> clients and customers colleagues and peers human resources (HR) officers learning and development (L&D) officers managers mentors.
3.3 Participate in <i>personal and professional development activities</i> that address identified needs, priorities and plans	Personal and professional development activities may include: <ul style="list-style-type: none"> individual informal study job sharing job training and external training mentoring and coaching networking shadowing.
Foundation Skills	Notes
Reading: Analyses and interprets <i>textual information</i> from organisational policies and practices or feedback to inform personal development planning	Textual information may include: <ul style="list-style-type: none"> organisational charts performance appraisal documents reports for achieving goals team management reporting timelines work schedules.



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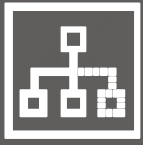
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BSBPEF502 Develop and use emotional intelligence**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50420 Diploma of Leadership and Management	BSB40120 Certificate IV in Business BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business BSB51319 Diploma of Work Health and Safety BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

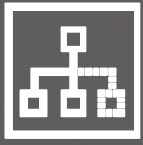
Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Develop <i>evaluation criteria</i> for assessing emotional strengths and weaknesses	Evaluation criteria may relate to: <ul style="list-style-type: none"> • awareness • communicating with others • peer feedback • resilience • self-reflecting • workplace relationships.
1.5 Seek <i>feedback from others</i> to identify and confirm methods for responding to emotional stressors in the workplace	Feedback from others may include: <ul style="list-style-type: none"> • customer and client feedback • performance reviews.
2.5 Consult with <i>relevant stakeholders</i> and identify improvement areas for own emotional intelligence	Relevant stakeholders may include: <ul style="list-style-type: none"> • clients and customers • colleagues and peers • human resources (HR) officers • learning and development (L&D) officers • managers • mentors.
Knowledge Evidence	Notes
<i>Methods</i> to develop emotional intelligence in others	Methods may include: <ul style="list-style-type: none"> • coaching and mentoring • continuous improvement strategies • formal training • opportunities for individuals to apply learnings • promoting an emotionally intelligent workforce • providing constructive feedback • self-reflecting.



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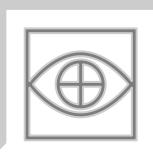
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Project Management Unit Sector Overview

The Project Management (PMG) unit sector incorporates units of competency aimed at supporting individuals in a range of industries and job roles to develop skills to manage and deliver projects. Relevant job roles may include project administrator, project manager, program manager and portfolio manager.

A project is a temporary venture undertaken to create a unique product, service or result. Projects have a defined beginning and end in time, and therefore defined scope and resources. Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Project Management Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Project Management' unit stream, please refer to the interpretation guidance provided on pages 429 - 505. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBPMG420 Apply project scope management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 <i>Participate in identifying project objectives and requirements and review project initiation documentation</i>	<p>Participating in identifying project objectives may relate to:</p> <ul style="list-style-type: none"> accessing information as part of a team or with team leader using digital tools (e.g. virtual meeting technology). <p>Initiation documentation may include:</p> <ul style="list-style-type: none"> business cases business needs analyses problem statements project charters statements of work.
2.2 Identify and <i>respond</i> to variations according to established <i>change control procedures</i> within scope of own responsibility	<p>Responding may include:</p> <ul style="list-style-type: none"> follow-up communications (e.g. emails). <p>Change control procedures may relate to:</p> <ul style="list-style-type: none"> delegations manuals project governance recording variations. <p>Change control procedures may vary depending on the industry, organisation or individual project.</p>
3.2 Contribute to <i>reporting</i> scope changes	<p>Reporting may relate to:</p> <ul style="list-style-type: none"> change control procedures impacts on time, costs and quality progress and status project governance. <p>Reporting may depend on organisational policies and procedures.</p>
Foundation Skills	Notes
Reading: Identifies and analyses <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) project plans regulations.



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BSBPMG420 Apply project scope management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Work according to project scope management plan including established change control procedures and <i>performance measurement procedures</i>	<p>Performance measurement procedures may include:</p> <ul style="list-style-type: none"> • analysing return on investment (ROI) • individual team member performance measurement (e.g. according to performance management plan) • measuring against baseline time and costs • tracking key performance indicators (KPIs) and milestones.
Knowledge Evidence	Notes
<i>Methods for measuring work outcomes and progress against plans</i>	<p>Methods for measuring work outcomes and progress may include:</p> <ul style="list-style-type: none"> • conducting iterative reviews against performance management plans • reporting iterative progress (e.g. daily, weekly) • using gantt charts to demonstrate progress against activities.
<i>Methods for reviewing project outcomes</i>	<p>Methods for reviewing project outcomes may be based on:</p> <ul style="list-style-type: none"> • final project reports • gap analysis • lessons learned • listing and scheduling activities • reviewing budgets, communications, goals and quality objectives • stakeholder satisfaction.



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BSBPMG421 Apply project time management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Contribute to identifying schedule impact on project time management, resource requirements, costs and risks using <i>project scheduling tools and techniques</i>	<p>Project scheduling tools and techniques may include:</p> <ul style="list-style-type: none"> critical path analysis gantts charts network diagrams.
Foundation Skills	Notes
Reading: Interprets <i>project documentation</i> to determine scheduling requirements and review performance	<p>Project documentation may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) project plans regulations.
Planning and organising: Uses <i>digital tools</i> to enter, analyse and present data and information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> digital collaboration tools internal organisational software spreadsheets virtual meeting technology word processing tools.
Performance Evidence	Notes
Apply <i>time-management techniques</i> in a project	<p>Time-management techniques may include:</p> <ul style="list-style-type: none"> project network diagrams project slack and float understanding project critical path.



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BSBPMG421 Apply project time management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Contents of work breakdown structure detail to enable effective project planning and control</i>	Contents of work breakdown structure detail may include: <ul style="list-style-type: none"> roles and responsibilities work breakdown structure dictionaries work packages.
<i>Methods for estimating task duration and resource requirements</i>	Methods for estimating may include: <ul style="list-style-type: none"> expert knowledge forward and backward pass calculations network diagrams three-point estimation.
<i>Tools and techniques for managing project time and their particular application</i>	Tools and techniques for managing project time may include: <ul style="list-style-type: none"> forward and backward pass calculations network diagrams.
<i>Techniques used to measure, record and report progress of activities</i>	Techniques may include: <ul style="list-style-type: none"> defining and tracking project scope status updates.
Assessment Conditions	Notes
<i>Workplace documentation relevant to project management</i>	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures project initiation documents project plans.
<i>Planning tools</i>	Planning tools may include: <ul style="list-style-type: none"> gant charts network diagrams.



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BSBPMG422 Apply project quality management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Contribute to identifying <i>quantifiable quality criteria</i> for project deliverables	Quantifiable quality criteria may relate to: <ul style="list-style-type: none"> • Australian standards • legislation • project initiation and compliance documentation • quality standards.
1.3 Locate and interpret <i>policy and procedures</i> for project quality	Policy and procedures may relate to: <ul style="list-style-type: none"> • key performance indicators (KPIs) • organisational checklists • quality control checks.
1.4 Contribute to developing <i>quality requirements</i> in the project plan and processes	Quality requirements may relate to: <ul style="list-style-type: none"> • audits • quality control checks.
2.2 Select and apply <i>quality management tools and techniques</i> to project processes according to organisational policy	Quality management tools and techniques may include: <ul style="list-style-type: none"> • checklists • check sheets • fishbone diagrams • flow charts • root cause analysis.
Foundation Skills	Notes
Numeracy: Extracts and evaluates <i>mathematical information</i> embedded in a range of tasks and texts	Mathematical information may include: <ul style="list-style-type: none"> • averages • median • mode • upper and lower control limits.
Planning and organising: Uses <i>formal and informal processes</i> to monitor implementation of plans and reflect on outcomes	Formal and informal processes may be sourced from: <ul style="list-style-type: none"> • organisational and project quality plans.
Knowledge Evidence	Notes
<i>Continuous improvement processes</i>	Continuous improvement processes may include: <ul style="list-style-type: none"> • DMAIC Process: Define, Measure, Analyse, Improve, Control • Plan-Do-Check-Act (PDCA) • Six Sigma.
<i>Quality-assurance processes and requirements</i>	Quality-assurance processes and requirements may relate to: <ul style="list-style-type: none"> • audit processes • control methods • documenting and recording • quality planning.



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BSBPMG422 Apply project quality management techniques**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40920 Certificate IV in Project Management Practice	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Quality criteria</i> relevant to industry	Quality criteria may relate to: <ul style="list-style-type: none"> • Australian standards • legislation • project initiation and compliance documentation • quality standards.
<i>Quality management tools and methodologies</i> relevant to industry and organisation	Quality management tools and methodologies may include using: <ul style="list-style-type: none"> • checklists • check sheets • fishbone diagrams • flow charts • root cause analysis.
<i>Quality standards</i> and their place in the project life cycle	Quality standards may relate to: <ul style="list-style-type: none"> • industry-specific standards and benchmarks • relevant International Organisation for Standardisation (ISO) standards.



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BSBPMG423 Apply project cost management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Apply <i>cost-estimating methods</i> and calculate costs of project resource requirements	Cost-estimating methods may include: <ul style="list-style-type: none"> • cost per square metre • general budgeting techniques • parametric modelling • rate per hour.
1.4 Communicate cost estimates to <i>relevant staff</i> and confirm accuracy and obtain input for project budget and cash flow management	Relevant staff may include: <ul style="list-style-type: none"> • finance teams • project managers • project schedulers • project sponsors.
1.6 Contribute to developing <i>cost management strategies and processes</i>	Cost management strategies and processes may include: <ul style="list-style-type: none"> • earned value management (EVM) systems.
2.2 Identify and report variations in budget using established <i>project cost methods, techniques and tools</i>	Project cost methods, techniques and tools may include: <ul style="list-style-type: none"> • checklists • check sheets • flow charts • forecasting.
3.1 Assist <i>relevant personnel</i> to review final project outcomes, budget and costs	Relevant personnel may include: <ul style="list-style-type: none"> • finance teams • project managers • project schedulers • project sponsors.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project plans • regulations.
Numeracy: Extracts and evaluates <i>mathematical information</i> embedded in a range of tasks and texts	Mathematical information may include: <ul style="list-style-type: none"> • estimated costs of completion • EVM-related mathematical information • forecasts • time estimates.



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BSBPMG423 Apply project cost management techniques**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Cost estimation methods, techniques and tools</i>	Cost estimation methods, techniques and tools may include: <ul style="list-style-type: none"> forecasting time and cost estimates.
<i>Financial assets, liabilities and records</i>	Financial assets, liabilities and records may relate to: <ul style="list-style-type: none"> capitalisation routines project profit and loss.



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BSBPMG424 Apply project human resources management approaches

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Create <i>work breakdown structure</i> including human resources according to task requirements	<p>Work breakdown structure may relate to:</p> <ul style="list-style-type: none"> communicating reporting.
1.4 <i>Assist in identifying</i> and discussing learning and development needs, goals, desired outcomes and relationships with <i>relevant staff</i>	<p>Assisting in identifying may relate to:</p> <ul style="list-style-type: none"> training needs analysis skills matrix. <p>Relevant staff may include:</p> <ul style="list-style-type: none"> contractors (e.g. onsite inductions, work health and safety) employees.
3.4 Assist in offering <i>human resource development opportunities</i> to individuals with skill gaps	<p>Human resource development opportunities may include:</p> <ul style="list-style-type: none"> coaching and mentoring teamwork courses webinars and seminars.
Foundation Skills	Notes
Reading: Identifies and interprets information from <i>organisational documentation</i>	<p>Organisational documentation may include:</p> <ul style="list-style-type: none"> policies and procedures project initiation documents project plans.
Problem solving: Uses a range of <i>strategies to facilitate solutions to conflicts</i>	<p>Strategies to facilitate solutions to conflicts may include referring to:</p> <ul style="list-style-type: none"> industry agreements and standards legislation organisational policies and procedures regulations.
Performance Evidence	Notes
Construct <i>effective methods for monitoring</i> roles, responsibilities and performance in projects	<p>Effective methods for monitoring may include:</p> <ul style="list-style-type: none"> performance management reviews.
Demonstrate <i>methods for providing feedback</i> on performance and improving performance of project team members	<p>Methods for providing feedback may be sourced from:</p> <ul style="list-style-type: none"> organisational processes and procedures.



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BSBPMG424 Apply project human resources management approaches**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Job design principles</i> and work breakdown structures	Job design principles may include: <ul style="list-style-type: none"> • job feedback • skills and capabilities • tasks and responsibilities.
<i>Learning and development approaches</i> that can be incorporated into project life cycle	Learning and development approaches may include: <ul style="list-style-type: none"> • coaching and mentoring • teamwork courses • webinars and seminars.
<i>Methods for skills analysis</i>	Methods for skills analysis may include: <ul style="list-style-type: none"> • focus groups • self-assessment • skills matrix.
<i>Conflict resolution strategies</i>	Conflict resolution strategies may include referring to: <ul style="list-style-type: none"> • industry agreements and standards • legislation • organisational policies and procedures • regulations.
<i>Stakeholder engagement styles</i>	Stakeholder engagement styles may include: <ul style="list-style-type: none"> • formal and informal engagement • individual or group-based engagement • written, verbal and visual communication.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> • organisational policies and procedures • project initiation documents • project plans.



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BSBPMG425 Apply project information management and communications techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Contribute to developing <i>project communications plan networks and techniques</i>	<p>Project communications plan networks and techniques may include:</p> <ul style="list-style-type: none"> • scheduling daily meetings • holding regular steering committee meetings. <p>Project communications plan networks and techniques may depend on stakeholder type and approach, may be formal or informal and may be tailored based on level of influence and project interest.</p>
1.4 Seek feedback on communication plan, networks and techniques from clients and other <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • managers.
2.2 Communicate <i>procedures for storing stakeholder information</i> to relevant stakeholders according to organisational policies and procedures	<p>Procedures for storing stakeholder information may include using:</p> <ul style="list-style-type: none"> • cloud-based storage • document management systems (DMS) • onedrive • sharepoint. <p>Procedures may depend on the organisation.</p>
3.2 <i>Seek feedback from relevant project authorities</i> on information management	<p>Seeking feedback may include:</p> <ul style="list-style-type: none"> • conducting online surveys • holding project and team meetings. <p>Relevant project authorities may include:</p> <ul style="list-style-type: none"> • portfolio managers • project managers • records managers.
Foundation Skills	Notes
Planning and organising: Maintains <i>records</i> according to organisational requirements	<p>Records may include:</p> <ul style="list-style-type: none"> • action and issue registers • meeting minutes.
Planning and organising: Manages information storage, retrieval and sharing, according to <i>security requirements</i>	<p>Security requirements may relate to:</p> <ul style="list-style-type: none"> • data protection • risk management • security awareness.



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BSBPMG425 Apply project information management and communications techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Models and methods of communications management in context of project life cycle and other project management functions</i>	Models and methods of communications management may include: <ul style="list-style-type: none"> • applying basic communication strategies • encoding and decoding feedback • linear, interactive and transactional communication techniques.
<i>Methods of reviewing outcomes</i>	Methods of reviewing outcomes may relate to: <ul style="list-style-type: none"> • timeliness of communications.
Assessment Conditions	Notes
Examples of <i>project management documentation</i> for communications-management purposes	Project management documentation may include: <ul style="list-style-type: none"> • flyers • meeting minutes • social media updates • status reports • survey results • websites.



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BSBPMG426 Apply project risk management techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Establish with <i>relevant personnel risk-analysis methods, techniques and tools</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients) internal stakeholders (e.g. project managers, portfolio managers). <p>Risk-analysis methods, techniques and tools may include:</p> <ul style="list-style-type: none"> qualitative and quantitative risk analyses.
1.4 Contribute to developing <i>risk management strategies, approaches and plans</i> according to organisational policies and procedures	<p>Risk management strategies, approaches and plans may relate to:</p> <ul style="list-style-type: none"> level of organisational risk tolerance organisational risk management frameworks.
1.5 Contribute to developing and implementing <i>risk-reporting mechanisms</i>	<p>Risk-reporting mechanisms may include:</p> <ul style="list-style-type: none"> regularly updating risk registers reporting on risk register through status reports.
2.4 Contribute to <i>reporting opportunities</i> for risk control	<p>Reporting opportunities may include:</p> <ul style="list-style-type: none"> regular project and team meetings status reports.
Knowledge Evidence	Notes
<i>Risk-contingency measures</i>	<p>Risk-contingency measures may include:</p> <ul style="list-style-type: none"> accepting and communicating risks avoiding, mitigating and transferring risks treatment plans.
Assessment Conditions	Notes
<i>Project management documentation</i> for risk management	<p>Project management documentation may include:</p> <ul style="list-style-type: none"> risk management frameworks risk plans risk registers.



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BSBPMG427 Apply project procurement procedures**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Contribute to developing procurement-management plan and <i>documentation</i>	Documentation may include: <ul style="list-style-type: none"> • requests for quotation (RFQ) • requests for tender (RFT) • statements of work.
2.4 Assist <i>relevant personnel</i> in establishing and checking relevant stakeholders perform agreed terms	Relevant personnel may include: <ul style="list-style-type: none"> • contract management personnel • procurement officers.
3.2 Undertake procurement activities and maintain information according to <i>reporting, confidentiality and audit requirements</i>	Reporting, confidentiality and audit requirements may relate to: <ul style="list-style-type: none"> • frequency of liaising with contractor and vendor.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from a variety of <i>texts</i>	Texts may include: <ul style="list-style-type: none"> • RFQ • RFT • statements of work.
Writing: Completes <i>project documentation</i> using required formats and structure	Project documentation may include: <ul style="list-style-type: none"> • procurement-management plans • project plans • project initiation documents.



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BSBPMG427 Apply project procurement procedures**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Procurement-management policy, processes and procedures</i>	Procurement-management policy, processes and procedures may relate to: <ul style="list-style-type: none"> • gifts registers • organisational procurement policies • preferred suppliers lists.
<i>Procurement documentation requirements</i>	Documentation requirements may include: <ul style="list-style-type: none"> • assets and disposal actions • contract planning, formation, negotiation and administration records • procurement logs and registers • quotes, invoices and receipts • supplier lists • test and acceptance results.
<i>Components of contractual documentation and the legal obligations of all parties</i>	Legal obligations of all parties may relate to: <ul style="list-style-type: none"> • payments plans • providing goods and services.
<i>Process used to select preferred contractors</i>	Processes used to selected preferred contractors may relate to: <ul style="list-style-type: none"> • competitive bidding • equal opportunity policies • negotiated contracting.
<i>Project procurement-management tools and techniques</i>	Procurement-management tools and techniques may include: <ul style="list-style-type: none"> • demand and supply graphs • value chain analysis diagrams • vendor management process flows.



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BSBPMG428 Apply project life cycle management processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify <i>project initiation documentation</i>	Project initiation documentation may include: <ul style="list-style-type: none"> • business cases • business needs analyses • problem statements • project charters • statements of work.
1.6 Assist in establishing the <i>project governance structure</i>	Project governance structures may relate to: <ul style="list-style-type: none"> • project functions • project type and nature • reporting lines and authorities.
2.1 Assist in drafting a <i>project charter</i> for approval	Project charters may include: <ul style="list-style-type: none"> • objectives • scope • stakeholders.
2.5 Assist in compiling relevant <i>plans</i> and project baselines for project management plan	Plans may relate to: <ul style="list-style-type: none"> • communications • quality • risk • timelines.
4.2 Assist in completing <i>financial, legal and contractual obligations</i>	Financial, legal and contractual obligations may relate to: <ul style="list-style-type: none"> • project finances and payments • providing goods and services.
Knowledge Evidence	Notes
<i>Methods to prepare project budgets</i>	Methods to prepare project budgets may include: <ul style="list-style-type: none"> • identifying project scope • defining resource requirements • obtaining approvals.
<i>Types of project logs and registers in use in this context</i>	Types of projects logs and registers may include: <ul style="list-style-type: none"> • change logs • communication logs • risk and issues logs and registers • quality logs • task completion logs • version control logs.



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BSBPMG428 Apply project life cycle management processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures project initiation documents project plans.
<i>Relevant legislation, regulations, standards and codes</i>	Legislation may include: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. Regulations, standards and codes may include: <ul style="list-style-type: none"> industry standards and regulations organisational and industry codes of practice.



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BSBPMG429 Apply project stakeholder engagement techniques

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Assist in negotiating agreement on <i>project communication method</i> , and content and timing of stakeholder engagement	Project communication methods may relate to: <ul style="list-style-type: none"> effective engagement with stakeholders identifying stakeholders.
Performance Evidence	Notes
Engage with project stakeholders using <i>effective interpersonal skills and appropriate methods of communication</i>	Interpersonal skills and appropriate methods of communication may relate to: <ul style="list-style-type: none"> cross-cultural awareness diversity and inclusion influencing and persuasive language negotiation skills resilience verbal and non-verbal communication.
Select and use <i>communications methods</i> relevant to the project needs and stakeholder expectations	Communication methods may include: <ul style="list-style-type: none"> interactive communication (e.g. workshops) verbal communication (e.g. meetings, telephone calls) written communication (e.g. emails, letters, text messages).
Knowledge Evidence	Notes
Different <i>levels of stakeholder engagement</i> on projects	Levels of stakeholder engagement may include: <ul style="list-style-type: none"> leading observing supporting unaware.
<i>Techniques and strategies</i> for stakeholder engagement	Techniques and strategies for stakeholder engagement may include: <ul style="list-style-type: none"> formal and informal engagement individual or group-based engagement written, verbal and visual communication.
<i>Common problems</i> leading to variances in stakeholder engagement	Common problems may relate to: <ul style="list-style-type: none"> communication breakdown untimely communication distribution.
Assessment Conditions	Notes
<i>Project documentation</i> detailing stakeholder engagement	Project documentation may include: <ul style="list-style-type: none"> communication plans and logs project plans project initiation documents.



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BSBPMG430 Undertake project work**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40720 Certificate IV in Library and Information Services BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Seek clarification from <i>delegating authority</i> of issues related to project and project parameters	Delegating authority may refer to: <ul style="list-style-type: none"> • contractors and vendors • customer and clients • managers • project sponsors.
1.4 Identify responsibilities of relevant stakeholders and <i>reporting requirements</i>	Reporting requirements may relate to: <ul style="list-style-type: none"> • budgets and finances • risk and issues • timelines. <p>Reporting requirements may depend on the project and organisation.</p>
2.1 Identify risks and develop a <i>risk management plan</i> for project, including Work Health and Safety (WHS)	Risk management plans may relate to: <ul style="list-style-type: none"> • level of organisational risk tolerance • organisational risk management frameworks.
2.4 Identify and access appropriate <i>project management tools</i>	Project management tools may include: <ul style="list-style-type: none"> • Program Evaluation Review Technique (PERT) charts • project management and scheduling software • risk and issues registers • spreadsheets • status reports.
3.2 Establish and maintain required <i>recordkeeping systems</i> throughout the project	Recordkeeping systems may require individuals to: <ul style="list-style-type: none"> • follow organisational processes and procedures • use digital tools (e.g. sharepoint, onedrive).
4.2 Complete <i>project documentation</i> and obtain sign-offs for concluding project	Project documentation may include: <ul style="list-style-type: none"> • project initiation documents • project plans.



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BSBPMG430 Undertake project work**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50620 Diploma of Marketing and Communication	BSB30120 Certificate III in Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40720 Certificate IV in Library and Information Services BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management
Skill sets	BSBSS00108 Marketing and Communication Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital technologies and applications</i> to access, organise and share information	Digital technologies and applications may include: <ul style="list-style-type: none"> digital collaboration tools presentation tools spreadsheets virtual meeting technology word processing tools.
Knowledge Evidence	Notes
<i>Types of documents</i> and other sources of information commonly used in defining the parameters of a project	Types of documents may include: <ul style="list-style-type: none"> contracts and agreements project briefs project plans.
Relevant <i>legislation and regulations</i> , including work health and safety (WHS) requirements, for project planning	Legislation may include: <ul style="list-style-type: none"> Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. Regulations may include: <ul style="list-style-type: none"> industry regulations.
Assessment Conditions	Notes
Workplace <i>documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> project initiation documents project plans.



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BSBPMG530 Manage project scope**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Develop and confirm procedures for project authorisation with an <i>appropriate authority</i>	Appropriate authority may include: <ul style="list-style-type: none"> individuals specified in financial delegations manual or organisational breakdown structure.
3.1 Implement agreed <i>scope management procedures and processes</i>	Scope management procedures and processes may involve: <ul style="list-style-type: none"> contracts and agreements project briefs project plans.
Foundation Skills	Notes
Reading: Interprets and analyses information from a range of <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> legislation organisational and industry codes of practice organisational policies and procedures project plans and charters regulations statements of work work breakdown structures.
Performance Evidence	Notes
Collaborate with stakeholders to produce a <i>scope-management plan</i>	Scope-management plans may include: <ul style="list-style-type: none"> approvals, authorities and delegations change management processes.



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BSBPMG530 Manage project scope**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Formal change-control processes</i>	Formal change-control processes may include: <ul style="list-style-type: none"> contracts and agreements major elements of the project likely to change (e.g. finance, design) project documentation (e.g. project plans and schedules).
<i>Methods for measuring work outcomes and progress against plans</i>	Methods for measuring work outcomes and progress may include: <ul style="list-style-type: none"> conducting iterative reviews against performance management plans reporting iterative progress (e.g. daily, weekly) using gantt charts to demonstrate progress against activities.
<i>Methods for segmenting and documenting a work breakdown structure</i>	Methods for segmenting and documenting may include: <ul style="list-style-type: none"> breaking down deliverables into actionable tasks determining key project phases using organisational templates.
<i>Procedures for reporting scope change</i>	Procedures for reporting scope change may include: <ul style="list-style-type: none"> following organisational policies and reporting protocols.
<i>Project management tools used for managing scope</i>	Project management tools may include: <ul style="list-style-type: none"> gant charts Program Evaluation Review Technique (PERT) charts project management and scheduling software spreadsheets status reports work breakdown structures.
<i>Types of project initiation documentation</i>	Project initiation documentation may include: <ul style="list-style-type: none"> business cases business needs analysis problem statements statements of work.



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BSBPMG531 Manage project time**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Develop <i>work breakdown structure</i> with sufficient detail to enable effective planning and control	Work breakdown structures may include: <ul style="list-style-type: none"> • roles and responsibilities • work breakdown structure dictionaries • work packages.
1.3 Use <i>project scheduling tools and techniques</i> to identify schedule impact on project time management, resource requirements, costs and risks	Project scheduling tools and techniques may include: <ul style="list-style-type: none"> • critical path analysis • gantt charts • network diagrams.
2.1 Implement <i>mechanisms to measure, record and report progress</i> of activities according to agreed schedule	Mechanisms to measure, record and report progress may include: <ul style="list-style-type: none"> • project plans • status reports.
Foundation Skills	Notes
Technology: Uses <i>digital applications</i> to access, organise, integrate and share relevant information in effective ways	Digital applications may include: <ul style="list-style-type: none"> • digital collaboration tools • presentation tools • project management and scheduling software • spreadsheets • virtual meeting technology • word processing tools.
Performance Evidence	Notes
Develop a project schedule using <i>project management tools and techniques</i>	Project management tools and techniques may include: <ul style="list-style-type: none"> • gantt charts • Program Evaluation Review Technique (PERT) charts • project management and scheduling software • spreadsheets • status reports • work breakdown structures.



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BSBPMG531 Manage project time**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Procedures for identifying critical path</i>	<p>Procedures for identifying critical path may include considering:</p> <ul style="list-style-type: none"> • available resources and supplies • contingency and risk • dependencies • time estimation • prior project history • regulations and standards • variations.
<i>Procedures for managing project baselines, establishment and variance</i>	<p>Procedures for managing project baselines may relate to:</p> <ul style="list-style-type: none"> • change management and control • risk management.
<i>Project life cycle phases</i>	<p>Project life cycle phases may include:</p> <ul style="list-style-type: none"> • costing • implementing • initiating • planning • scoping.
<i>Best-practice time management methodologies, their capabilities, limitations, applications and outcomes</i>	<p>Time management methodologies may include:</p> <ul style="list-style-type: none"> • conducting qualitative and quantitative time analysis • critical chain management • critical path analysis • engaging with subject matter experts • gantt charts • project schedule network diagrams • using project management and scheduling software.
<i>Key tools for project scheduling</i>	<p>Tools for project scheduling may include:</p> <ul style="list-style-type: none"> • critical path method • gantt charts • Program Evaluation Review Technique (PERT) charts • project management and scheduling software • spreadsheets • status reports • work breakdown structures.



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BSBPMG532 Manage project quality**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	BSB50920 Diploma of Quality Auditing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop <i>quality metrics</i> for the project and any product output in a quality management plan	Quality metrics may include: <ul style="list-style-type: none"> quality assurance and quality control metrics.
1.3 Select <i>quality management methods and tools</i> for resolving quality issues	Quality management methods and tools may include: <ul style="list-style-type: none"> benchmarking brainstorming control charts cost-benefit analysis flow charts root cause analysis run charts selection criteria.
2.3 Identify causes of variance to quality metrics and undertake <i>remedial action</i>	Remedial action may involve conducting: <ul style="list-style-type: none"> fishbone analysis root cause analysis.
2.4 <i>Maintain a quality management system</i> for timely recording of quality audit data	Maintaining a quality management system may relate to: <ul style="list-style-type: none"> International Organisation for Standardisation (ISO) standards for Project Management (e.g. ISO 21500:2012).
3.1 Review processes and implement agreed changes continually throughout the <i>project life cycle</i>	Project life cycle may include: <ul style="list-style-type: none"> costing implementing initiating planning scoping.

Foundation Skills	Notes
Technology: Uses <i>digital applications</i> to access, organise, integrate and share relevant information in effective ways	Digital applications may include: <ul style="list-style-type: none"> digital collaboration tools presentation tools project management and scheduling software spreadsheets virtual meeting technology word processing tools.



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BSBPMG532 Manage project quality**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	BSB50920 Diploma of Quality Auditing
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Document a <i>quality-management plan</i>	Quality-management plans may include: <ul style="list-style-type: none"> project scope and schedule quality metrics, controls and requirements.
Implement <i>quality control and assurance processes</i> for a defined project using a range of tools and methodologies	Quality control and assurance processes may include: <ul style="list-style-type: none"> authorisations and responsibilities for quality control continuous improvement processes measurable quality metrics quality data recording and maintenance reliability and validity requirements.
Knowledge Evidence	Notes
<i>Quality management theory</i>	Quality management theory may relate to: <ul style="list-style-type: none"> quality assurance quality control quality improvement quality planning.
<i>Methods for managing continuous improvement</i>	Methods for managing continuous improvement may include: <ul style="list-style-type: none"> DMAIC Process: Define, Measure, Analyse, Improve, Control Plan-Do-Check-Act (PDCA) Six Sigma.
Assessment Conditions	Notes
<i>Project documentation</i> including quality criteria, evidence of quality monitoring and improvement practices	Project documentation may include: <ul style="list-style-type: none"> project plans project initiation documents quality-management plans.



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BSBPMG533 Manage project cost**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>resource requirements</i> for individual tasks identified in the work breakdown structure in consultation with relevant stakeholders	Resource requirements may relate to: <ul style="list-style-type: none"> • budgets and finances • predicting anticipated outcomes.
1.4 Develop a <i>cost-management plan</i> for project finances according to scope of responsibility	Cost-management plan may include: <ul style="list-style-type: none"> • approval processes • communication and reporting processes • financial authorisations and delegations • invoice procedures.
2.1 Implement agreed <i>financial-management processes</i> and procedures for monitoring actual expenditure against budget	Financial-management processes may include: <ul style="list-style-type: none"> • budgeting • communication and reporting processes • financial authorisations and delegations • financial planning and forecasting.
3.2 Review project outcomes using available <i>records</i>	Records may include: <ul style="list-style-type: none"> • budgets and financial statements • cost-management plans • financial-management plans • invoice and payment summaries • project plans and reports.
Performance Evidence	Notes
<i>Monitor costs</i> across a project's life cycle including solving cost variations and analysing possible alternatives	Monitoring costs may involve: <ul style="list-style-type: none"> • calculating earned value management (EVM) • forecasting time and cost estimates.



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BSBPMG533 Manage project cost**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Appropriate budgeting processes, tools and techniques</i>	Budgeting processes, tools and techniques may include: <ul style="list-style-type: none"> • earned value metrics • forecasting.
<i>Methods and tools for costing and cost analysis</i>	Methods and tools for costing may include: <ul style="list-style-type: none"> • project management and scheduling software • spreadsheets.
<i>Strategies for managing costs and their application in different situations</i>	Strategies for managing costs may include: <ul style="list-style-type: none"> • contingency planning and funds • increasing budgets • planning for delays.
<i>Processes for reviewing costs against outcomes</i>	Processes for reviewing costs may include: <ul style="list-style-type: none"> • iterative reviews against cost-management plans • reporting cost updates to key stakeholders • using a graphs and charts to demonstrate progress against budgets.
<i>Cost-analysis methods and tools for identifying and evaluating cost variations</i>	Cost-analysis methods and tools may include: <ul style="list-style-type: none"> • comparing actual costs with budgeted costs • project management and scheduling software • spreadsheets.



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BSBPMG534 Manage project human resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Support performance of personnel using <i>human resources management (HRM) methods and tools</i>	<p>Human resources management (HRM) methods and tools may include:</p> <ul style="list-style-type: none"> operations managers organisational HR policies and procedures reporting chains. <p>HRM methods and tools may depend on the organisation.</p>
2.3 Measure individuals' performance against agreed criteria and initiate <i>actions for shortfalls in performance</i>	<p>Actions for shortfalls in performance may include:</p> <ul style="list-style-type: none"> developing a performance management plan ongoing performance monitoring and feedback.
3.1 Implement <i>processes for improving individual performance</i> and overall project effectiveness	<p>Processes for improving individual performance may include:</p> <ul style="list-style-type: none"> extrinsic incentives (e.g. promotions, rewards) intrinsic incentives (e.g. affirmations, recognitions).
3.3 Implement procedures for <i>interpersonal communication, counselling, and conflict resolution</i>	<p>Interpersonal communication, counselling and conflict resolution may relate to:</p> <ul style="list-style-type: none"> cross-cultural awareness diversity and inclusion negotiation and mediation resilience verbal and non-verbal communication.
Performance Evidence	Notes
Identify and organise <i>project personnel training and development</i>	<p>Project personnel training and development may include:</p> <ul style="list-style-type: none"> coaching and mentoring teamwork coursed webinars and seminars.
Knowledge Evidence	Notes
<i>Tools and techniques to identify resource requirements</i> including required project personnel levels and competencies	<p>Tools and techniques to identify resource requirements may include:</p> <ul style="list-style-type: none"> interviews project and team meetings skill and competency gap analysis.
<i>Strategies for managing project human resources</i> and their application to different situations	<p>Strategies for managing project human resources may relate to:</p> <ul style="list-style-type: none"> conflict resolution individual and group competency identification and development learning and development performance monitoring, assessment and reporting personnel plans and job descriptions personnel recruitment and reallocation.



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BSBPMG535 Manage project information and communication

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop a <i>communication management plan</i> according to project objectives	<p>Communication management plans may include:</p> <ul style="list-style-type: none"> governance structures monitoring processes stakeholders.
2.2 Implement, modify, monitor and control designated <i>information-validation processes</i>	<p>Information-validation processes may depend on the organisation and industry.</p>
2.4 Identify and resolve communication and <i>information-management system issues</i>	<p>Information-management systems may include:</p> <ul style="list-style-type: none"> design processes physical systems soft skills (e.g. communication). <p>Issues may include:</p> <ul style="list-style-type: none"> access to information business accreditation requirements different labour sources (e.g. outsourcing, casual, full-time) information security work health and safety (WHS) system issues.
3.1 Finalise and archive records according to agreed project <i>information ownership and control requirements</i>	<p>Information ownership and control requirements may relate to:</p> <ul style="list-style-type: none"> Australian Securities and Investments Commission (ASIC) requirements Privacy Act 1988.

Foundation Skills	Notes
Reading: Identifies and analyses <i>complex texts</i> from a range of sources	<p>Complex texts may include:</p> <ul style="list-style-type: none"> legislation organisational policies and procedures.
Planning and organising: Uses <i>problem-solving techniques</i> to analyse and resolve issues	<p>Problem-solving techniques may include:</p> <ul style="list-style-type: none"> change requests.
Planning and organising: Uses <i>digital tools</i> to access, organise and analyse complex data	<p>Digital tools may include:</p> <ul style="list-style-type: none"> digital collaboration tools project management and scheduling software spreadsheets word processing tools.



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BSBPMG535 Manage project information and communication**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Alternative communication methods and media and their application on various projects</i>	Alternative communication methods and media may include: <ul style="list-style-type: none"> • in-person meetings • virtual meeting technology.
<i>Methods used to evaluate information systems and communication processes</i>	Methods used to evaluate information systems may include assessing: <ul style="list-style-type: none"> • accessibility and useability • consistency • reliability • training. Methods used to evaluate communication processes may include assessing: <ul style="list-style-type: none"> • language simplicity and appropriateness.



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BSBPMG536 Manage project risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify project <i>risk context</i> to inform risk management processes	<p>Risk context may relate to:</p> <ul style="list-style-type: none"> internal and external environments risk management standards strategic operations.
1.3 Identify project risks using valid and reliable <i>risk identification methods</i>	<p>Risk identification methods may include:</p> <ul style="list-style-type: none"> brainstorming decision trees environmental analysis (e.g. PESTEL and SWOT) processing audits (e.g. system audits) risk matrices.
2.1 Identify <i>risk analysis classification criteria</i> and apply to agreed <i>risk ranking system</i>	<p>Risk analysis classification criteria may relate to:</p> <ul style="list-style-type: none"> risk assessment matrices. <p>Risk ranking systems may relate to:</p> <ul style="list-style-type: none"> risk breakdown structures (e.g. categorising risks).
2.4 <i>Document</i> risk analysis outcomes for inclusion in risk register and risk management plan	<p>Documents may include:</p> <ul style="list-style-type: none"> risk review reports.
3.1 Identify and document existing <i>risk controls</i>	<p>Risk controls may include:</p> <ul style="list-style-type: none"> continuous monitoring and communication (e.g. risk audit and reviews) project risk frameworks risk indicators risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) risk registers strategies to minimise negative impacts (e.g. in planning or implementation stages).
3.2 Analyse <i>risk treatment options</i> using agreed consultative methods	<p>Risk treatment options may include:</p> <ul style="list-style-type: none"> risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) strategies to minimise negative impacts (e.g. in planning or implementation stages).
4.1 Establish <i>risk review processes</i>	<p>Risk review processes may include:</p> <ul style="list-style-type: none"> dedicated group reviews individual tasks and responsibilities. <p>Risk review processes may depend on the organisation and industry.</p>



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BSBPMG536 Manage project risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets and critically analyses <i>complex texts</i> from a range of sources and determines how content may be applied according to organisational requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • legislation • organisational policies and procedures • project plans and charters • statement of work • work breakdown structures.
Knowledge Evidence	Notes
Characteristics, techniques and applications of <i>quantitative</i> and <i>qualitative risk management techniques and approaches</i>	<p>Quantitative risk management techniques and approaches may include:</p> <ul style="list-style-type: none"> • comparing budget and actuals • quality aspects of non-conformance • statistical risk analysis • using baselines. <p>Qualitative risk management techniques and approaches may include:</p> <ul style="list-style-type: none"> • analysing audit reports • conducting stakeholder surveys • seeking feedback within meetings.
Industry sector risk classifications and different <i>risk contexts</i>	<p>Risk contexts may relate to:</p> <ul style="list-style-type: none"> • internal and external environments • risk management standards • strategic operations.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • organisational policies and procedures • project plans and charters • risk review reports • statement of work • status reports • work breakdown structures.



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BSBPMG537 Manage project procurement**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50820 Diploma of Project Management
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Establish agreed <i>procurement management plan</i>	<p>Procurement management plans may include:</p> <ul style="list-style-type: none"> contingency plans statements of work tender documents.
1.6 Determine <i>selection processes and selection criteria</i> , and communicate to suppliers	<p>Selection processes and selection criteria may relate to:</p> <ul style="list-style-type: none"> bidding credit terms lead times preferred suppliers quality requirements types of purchases weighted averages.
1.7 Obtain approvals from <i>relevant stakeholders</i> for procurement processes to be used	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> boards firm partners procurement departments project managers project sponsors quality assurance teams. <p>Relevant stakeholders may depend on the type of purchase and organisation.</p>
2.3 Select preferred supplier according to <i>legal requirements</i> and agreed selection criteria	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 ethical requirements industry context (e.g. medical, construction, finance, government).
3.2 Maintain <i>procurements records and documentation</i> according to organisational policies and procedures	<p>Procurement records and documentation may include:</p> <ul style="list-style-type: none"> purchase receipts requests for information standard terms and conditions statements of work tender documents.
3.5 Identify and report procurement management challenges and implement agreed <i>remedial actions</i>	<p>Remedial actions may include:</p> <ul style="list-style-type: none"> governance structure reviews and amendments purchasing limits.
4.2 Review project outcomes using procurement records and information and determine effectiveness of <i>procurement processes and procedures</i>	<p>Procurement processes and procedures may relate to:</p> <ul style="list-style-type: none"> credit issues (e.g. stop credit) internal audits key performance indicators (KPIs) timely invoice payments.



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BSBPMG537 Manage project procurement**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50820 Diploma of Project Management
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets, evaluates and critiques ideas and information from a range of <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> project charters legislation organisational policies and procedures statement of work status reports work breakdown structures.
Performance Evidence	Notes
Identify and act according to <i>probity and project governance constraints</i>	Probity and project governance constraints may relate to: <ul style="list-style-type: none"> compliance with policies and legislation escalation processes ethical authority limits privacy and security requirements relevant Australian Standards.
Knowledge Evidence	Notes
<i>Vendor selection criteria</i>	Vendor selection criteria may require: <ul style="list-style-type: none"> holistic approach (e.g. considering a range of perspectives, such as financial, sustainability, organisational culture). <p>Vendor selection criteria may depend on the organisation.</p>
<i>Conflict resolution and management</i>	Conflict resolution and management may involve following: <ul style="list-style-type: none"> industry agreements organisational policies and procedures relevant legislation and regulations.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to procurement and contracts	Workplace documentation may include: <ul style="list-style-type: none"> procurement management plans purchase receipts requests for information standard terms and conditions statements of work tender documents.



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BSBPMG538 Manage project stakeholder engagement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Determine and agree with <i>relevant stakeholders</i> on <i>forms of engagement, communication methods</i> , project content, budget and timelines	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors, vendors) internal stakeholders (e.g. project managers, project sponsors, team members). <p>Forms of engagement may relate to:</p> <ul style="list-style-type: none"> developing a RACI matrix (responsible, accountable, consulted, informed). <p>Communication methods may include:</p> <ul style="list-style-type: none"> interactive communication (e.g. workshops) verbal communication (e.g. meetings, telephone calls) written communication (e.g. emails, status reports, reports). <p>Relevant stakeholders, forms of engagement and communication methods may depend on the type of project and power interests.</p>
2.2 Develop <i>knowledge management systems</i> to capture team progress, insights and experiences	<p>Knowledge management systems may involve:</p> <ul style="list-style-type: none"> dedicated intranet sites leveraging knowledge articles and industry representatives project management software systems suggesting improvements and providing feedback.
2.5 Support development of <i>interpersonal skills</i> of the team for stakeholder engagement	<p>Interpersonal skills may relate to:</p> <ul style="list-style-type: none"> cross-cultural awareness diversity and inclusion influencing and persuading others negotiation and mediation skills resilience verbal and non-verbal communication.
Performance Evidence	Notes
Implement a range of appropriate stakeholder <i>communication mechanisms</i>	<p>Communication mechanisms may involve:</p> <ul style="list-style-type: none"> stakeholder co-creation and collaboration using a variety of methodologies (e.g. quick presentations, written reports). <p>Communication mechanisms may depend on the context (e.g. in-person or online).</p>



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BSBPMG538 Manage project stakeholder engagement**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Stakeholder engagement approaches</i>	Stakeholder engagement approaches may include: <ul style="list-style-type: none"> formal and informal engagement individual or group-based engagement written, verbal and visual communication.
<i>Stakeholder engagement theory</i>	Stakeholder engagement theory may involve: <ul style="list-style-type: none"> developing effective relationships identifying stakeholder priorities, potential conflicts and project opportunities.
<i>Types of project stakeholders</i>	Project stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. associated organisations, clients, communities, suppliers, contractors, vendors, end-users) internal stakeholders (e.g. project sponsors, team members, project managers, boards).
<i>Conducting performance reviews</i>	Performance reviews may include: <ul style="list-style-type: none"> identifying risks, issues and best practice tracking performance against goals, objectives and key performance indicators (KPIs).



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BSBPMG539 Manage project governance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	BSBSS00114 Organisational Governance Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>stakeholders required</i> for project governance and decision-making	<p>Stakeholders required may include:</p> <ul style="list-style-type: none"> Chief Executive Officers (CEO) governance specialists. <p>Stakeholders required may depend on the size of the organisation and size / nature of project.</p>
1.3 Assign governance roles and responsibilities to relevant stakeholders and establish <i>delegated authorities</i>	<p>Delegated authorities may be determined by:</p> <ul style="list-style-type: none"> developing a RACI matrix (responsible, accountable, consulted, informed).
2.1 Create a <i>decision-making framework</i>	<p>Decision-making frameworks may be based on:</p> <ul style="list-style-type: none"> collaboration majority consensus.
2.3 Identify potential risks and develop <i>risk management plan</i>	<p>Risk management plans may relate to:</p> <ul style="list-style-type: none"> level of organisational risk tolerance organisational risk management frameworks.
2.4 Plan for any change and establish <i>change management processes</i>	<p>Change management processes may include:</p> <ul style="list-style-type: none"> project goals and objectives key timelines roles and responsibilities.
2.5 Develop <i>processes to manage budget and resources</i>	<p>Processes to manage budget and resources may include:</p> <ul style="list-style-type: none"> estimations forecasting timelines.
2.6 Develop relevant <i>documents related to communication, conflict management and stakeholder management</i>	<p>Documents related to communication, conflict management and stakeholder management may include:</p> <ul style="list-style-type: none"> industry agreements organisational policies and procedures project plans and charters.
3.1 Develop <i>knowledge management systems</i> to capture progress, insights and experiences	<p>Knowledge management systems may involve:</p> <ul style="list-style-type: none"> dedicated intranet sites leveraging knowledge articles and industry representatives project management software systems suggesting improvements and providing feedback.
Foundation Skills	Notes
Self-management: Recognises and responds to <i>explicit and implicit organisational procedures and protocols</i>	<p>Explicit and implicit organisational procedures and protocols may relate to:</p> <ul style="list-style-type: none"> internet usage policies organisational and industry codes of conduct organisational and project culture work flows.



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BSBPMG539 Manage project governance**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	BSBSS00114 Organisational Governance Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Escalation and issues management models</i>	Escalation and issues management models may relate to: <ul style="list-style-type: none"> • agreed project reporting lines • organisational policies and procedures.
<i>Frameworks for authority delegations</i>	Frameworks for authority delegations may relate to: <ul style="list-style-type: none"> • budgets and finances • decision-making processes • liaising with clients • purchasing • stakeholder engagement and management.
<i>Methods to moderate and solve conflicts in context of project management</i>	Methods to moderate and solve conflicts may involve following: <ul style="list-style-type: none"> • industry agreements • organisational policies and procedures • relevant legislation and regulations.



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BSBPMG540 Manage project integration

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify, clarify and prepare <i>project initiation documentation</i>	<p>Project initiation documentation may include:</p> <ul style="list-style-type: none"> • requests for information • standard terms and conditions • statements of work • tender documents.
1.2 Identify <i>stakeholders with decision making authority</i> on project	<p>Stakeholders with decision making authority may include:</p> <ul style="list-style-type: none"> • boards • project managers • project sponsors.
1.6 Establish <i>project governance structure</i> with stakeholders and project authority	<p>Project governance structures may relate to:</p> <ul style="list-style-type: none"> • project functions • project type and nature • reporting lines and authorities.
1.7 Prepare and submit <i>project charter</i> for approval by relevant authorities	<p>Project charters may include:</p> <ul style="list-style-type: none"> • objectives • scope • stakeholders.
2.2 Identify <i>project stages and key requirements for stage completion</i> against client requirements and project objectives	<p>Project stages and key requirements for stage completion may relate to:</p> <ul style="list-style-type: none"> • costing • planning • scoping.
2.3 Analyse <i>project management functions</i> to identify interdependencies and impacts of constraints	<p>Project management functions may relate to:</p> <ul style="list-style-type: none"> • governance structures • roles and responsibilities.
2.5 Establish <i>tools</i> to monitor and control planned activity	<p>Tools may include:</p> <ul style="list-style-type: none"> • project plans and schedules.
3.3 Confirm <i>project records</i> are updated against project deliverables at required intervals	<p>Project records may include:</p> <ul style="list-style-type: none"> • standard terms and conditions • statements of work • tender documents.
3.5 Analyse and submit <i>impact analysis</i> of change requests for approval	<p>Impact analysis may relate to:</p> <ul style="list-style-type: none"> • project scope. <p>Impact analysis may be submitted to change control board or steering committee.</p>
4.2 Confirm project products and associated <i>documentation</i> are prepared for handover to client in a timely manner	<p>Documentation may include:</p> <ul style="list-style-type: none"> • project deliverables and reports.



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BSBPMG540 Manage project integration

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50820 Diploma of Project Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.3 Finalise <i>financial, legal and contractual obligations</i>	<p>Financial, legal and contractual obligations may relate to:</p> <ul style="list-style-type: none"> • Commonwealth Procurement Rules 20 April 2019 • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project plans • regulations.
Self-management: Complies with <i>organisational requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • legislation • organisational and industry codes of conduct.
Knowledge Evidence	Notes
<i>Organisational documentation for recording strategies and goals for integration processes</i>	<p>Organisational documentation for recording strategies may include:</p> <ul style="list-style-type: none"> • organisational templates.
<i>Project management plan</i>	<p>Project management plans may include:</p> <ul style="list-style-type: none"> • communications • quality plans • risk management plans • timelines.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • organisational policies and procedures • project initiation documents • project plans.



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BSBPMG541 Manage complex projects**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>criteria</i> for determining project as complex	<p>Criteria may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • geography and international considerations (e.g. moving between different jurisdictions, legislation, timeframes) • project size • technical, structural, directional, temporal and socio-cultural complexities • technologies.
2.1 Assess <i>project plan and implementation details</i> , and communicate roles and responsibilities to team members	<p>Project plan and implementation details may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • communication processes and plans • resource requirements • roles and responsibilities • stakeholder engagement.
3.1 Identify and establish <i>tools that assist in managing complex projects</i>	<p>Tools that assist in managing complex projects may include:</p> <ul style="list-style-type: none"> • detailed project plans • project management and scheduling software • risk and issue registers • status reports.
3.3 Seek feedback from <i>relevant stakeholders</i> on project progress and project management skills	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. clients, suppliers, contractors vendors) • internal stakeholders (e.g. project managers, program managers, project sponsors, team members).



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BSBPMG541 Manage complex projects**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Learning: Interprets, analyses and assesses textual and numerical information obtained from a wide range of <i>sources</i> and determines how content may be applied to a complex project situation	Sources may include: <ul style="list-style-type: none"> • budgets • legislation • organisational policies and procedures • regulations • standards.
Initiative and enterprise: Takes responsibility for identifying and following <i>policies, procedures and standards</i>	Policies, procedures and standards may include: <ul style="list-style-type: none"> • Australian and industry standards • organisational policies and procedures.
Technology: Identifies <i>tools and technologies</i> to assist in the identification and implementation of ongoing monitoring of complex projects	Tools and technologies may include: <ul style="list-style-type: none"> • detailed project plans • project management and scheduling software • risk and issue registers • status reports.
Technology: Uses <i>digital applications</i> to access, organise, integrate and share relevant information in effective ways	Digital applications may include: <ul style="list-style-type: none"> • digital collaboration tools • presentation tools • project management and scheduling software • spreadsheets • virtual meeting technology • word processing tools.
Knowledge Evidence	Notes
<i>Industry standards and tools</i> to assist in the establishment of policy, procedures, plans and processes related to the management of complex projects	Industry standards and tools may include: <ul style="list-style-type: none"> • expert guidance and knowledge • International Organisation for Standardisation (ISO) standards for Project Management (e.g. ISO 21500:2012) • reporting lines and decision-making frameworks.



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BSBPMG541 Manage complex projects

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50820 Diploma of Project Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Relevant written information</i> beyond the immediate project environment	Relevant written information may include: <ul style="list-style-type: none">• legislation• organisational policies and procedures• program and portfolio plans• regulations• standards.
<i>Relevant stakeholders</i> beyond the immediate project environment	Relevant stakeholders may include: <ul style="list-style-type: none">• external stakeholders (e.g. client organisations, general public, agencies)• internal stakeholders (e.g. program managers, portfolio managers, project sponsors).



BSBPMG630 Enable program execution

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>program procurements, scope, timeline, budget, client expectations</i> and organisational goals	<p>Program procurements, scope, timeline, budget, client expectations may involve:</p> <ul style="list-style-type: none"> considering suppliers identifying business and program needs negotiating terms and conditions.
1.3 Identify and explore with <i>relevant stakeholders</i> gaps between current state and desired future state	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors, team members).
2.1 Identify <i>program execution approach</i>	<p>Program execution approaches may involve:</p> <ul style="list-style-type: none"> program and project management tools and software program and project plans stakeholder engagement.
3.1 Prepare and seek approval from <i>relevant stakeholders</i> on business case for desired future state and program execution approach	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors).
3.2 Identify and develop <i>program management structure</i>	<p>Program management structures may relate to:</p> <ul style="list-style-type: none"> program and project functions project types and nature reporting lines and authorities.
3.3 Identify and create <i>policies, processes, and procedures</i> for supporting management of program	<p>Policies, processes, and procedures may relate to:</p> <ul style="list-style-type: none"> communications quality risk management.
3.4 Develop a <i>knowledge management system</i> to capture progress, insights, experiences and learnings	<p>Knowledge management systems may involve:</p> <ul style="list-style-type: none"> dedicated intranet sites leveraging knowledge articles and industry representatives program and project management software systems suggesting improvements and providing feedback.
4.1 Finalise <i>financial, legal and contractual obligations</i>	<p>Financial, legal and contractual obligations may relate to:</p> <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.



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BSBPMG630 Enable program execution

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • program and project plans • regulations.
Writing: Develops and refines a range of <i>program related documents</i> using appropriate format, vocabulary and structure	<p>Program related documents may include:</p> <ul style="list-style-type: none"> • program plans • program policies, processes and procedures • program requirements.
Performance Evidence	Notes
Conceptualise, clarify and document <i>future state descriptions</i>	<p>Future state descriptors may relate to:</p> <ul style="list-style-type: none"> • program vision, goals and objectives • quality • stakeholder satisfaction.
Develop and document a <i>program execution strategy, governance model and business case</i>	<p>Program execution strategies, governance models and business cases may involve:</p> <ul style="list-style-type: none"> • identifying and documenting key milestones, deliverables and tasks • outlining reporting lines and decision-making frameworks.
Assessment Conditions	Notes
Examples of <i>program documentation</i>	<p>Program documentation may include:</p> <ul style="list-style-type: none"> • program plans • program policies, processes and procedures • program requirements.



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BSBPMG631 Manage program delivery

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and communicate funding requirements with <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. project managers, program managers, portfolio managers, project sponsors).
1.3 Identify and address <i>funding issues</i> and satisfy funding agent requirements	<p>Funding issues may relate to:</p> <ul style="list-style-type: none"> budgets funding sources procurement options.
2.1 Establish <i>monitoring and control systems</i> and support delivery of desired outcomes	<p>Monitoring and control systems may include:</p> <ul style="list-style-type: none"> quality checks status updates and reports.
3.1 Identify, document and communicate relevant <i>legal and regulatory requirements</i> to <i>key stakeholders</i>	<p>Legal and regulatory requirements may relate to:</p> <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. <p>Key stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. project managers, program managers, portfolio managers, project sponsors, team members).
3.3 Implement <i>compliance policies, processes, and procedures</i>	<p>Compliance policies, processes and procedures may relate to:</p> <ul style="list-style-type: none"> legislative obligations reporting requirements.
4.2 Document and communicate to relevant stakeholders, <i>risk management approach</i> for the program and its constituent projects	<p>Risk management approaches may depend on:</p> <ul style="list-style-type: none"> level of organisational risk tolerance organisational risk management frameworks.

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) program plans regulations.
Writing: Creates and updates <i>program documentation</i> using organisational formats and appropriate vocabulary	<p>Program documentation may include:</p> <ul style="list-style-type: none"> organisational policies and procedures program initiation documents program plans.



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BSBPMG631 Manage program delivery**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Prepare a program <i>risk management plan</i>	Risk management plans may relate to: <ul style="list-style-type: none"> level of organisational risk tolerance organisational risk management frameworks.
Use <i>software and data analysis methods</i> to structure program data	Software and data analysis methods may be: <ul style="list-style-type: none"> diagnostic prescriptive statistical.
Knowledge Evidence	Notes
<i>Evaluation and moderation methods</i>	Evaluation and moderation methods may relate to: <ul style="list-style-type: none"> benefits outcomes and deliverables quality timely delivery.
<i>Resource types, characteristics and supply</i>	Resource types may include: <ul style="list-style-type: none"> equipment and materials human resources technology.
<i>Program funding models</i>	Program funding models may include: <ul style="list-style-type: none"> donations government grants.
<i>Risk management standards and methodology</i>	Risk management standards and methodologies may relate to: <ul style="list-style-type: none"> level of organisational risk tolerance organisational risk management frameworks.
Assessment Conditions	Notes
Access to <i>workplace documentation</i> for the management of program delivery	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures program initiation documents program plans.



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BSBPMG632 Manage program risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Select and modify <i>program risk methodology</i> to match the context for risk	Program risk methodology may include: <ul style="list-style-type: none"> analysing risks against program risk frameworks continuous monitoring and communication (e.g. risk audit and reviews) developing risk registers identifying risk indicators risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) strategies to minimise negative impacts (e.g. in planning or implementation stages).
1.3 Consult with <i>relevant stakeholders</i> and identify, document and analyse program level risks	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors, team members).
1.5 Develop and maintain a program <i>risk-management system</i> for effective management and communication of risks, controls, treatments and outcomes to stakeholders across the program	Risk-management systems may involve: <ul style="list-style-type: none"> continuous monitoring and communication (e.g. risk audit and reviews) project risk frameworks risk indicators risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) risk registers strategies to minimise negative impacts (e.g. in planning or implementation stages).
2.3 Confirm risks are <i>monitored and assessed</i> across the program at agreed intervals	Monitored and assessed may involve: <ul style="list-style-type: none"> analysing identifying response planning tracking.
2.4 Direct response to actuated program risk and confirm <i>remedial actions</i> are authorised with impact analysis according to program objectives	Remedial actions may relate to: <ul style="list-style-type: none"> risk acceptance risk avoidance risk mitigation risk transfers (e.g. to a third party).
3.1 Identify and document program residual risk and communicate to stakeholders any <i>transferred liability</i> at program completion	Transferred liability may include: <ul style="list-style-type: none"> debts.



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BSBPMG632 Manage program risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • program plans • regulations.
Writing: Documents <i>risk-management outcomes</i> using format and terminology appropriate to the audience	Risk-management outcomes may depend on: <ul style="list-style-type: none"> • mitigation strategies and plans • risk-management plans and frameworks.
Knowledge Evidence	Notes
The use of a dynamic <i>risk register</i> across a program	Risk registers may include: <ul style="list-style-type: none"> • project impacts • ratings for risk likelihood and consequence • residual risk • risk categories and descriptions • risk owners • risk rankings.
The use of <i>risk management tools, frameworks, systems, methodologies</i> and standards	Risk management tools, frameworks, systems, methodologies may include: <ul style="list-style-type: none"> • continuous monitoring and communication (e.g. risk audit and reviews) • project risk frameworks • risk indicators • risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) • risk registers • strategies to minimise negative impacts (e.g. in planning or implementation stages).
Assessment Conditions	Notes
<i>Workplace risk management documentation</i>	Workplace risk management documentation may include: <ul style="list-style-type: none"> • risk assessments • risk management frameworks • risk registers.



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BSBPMG633 Provide leadership for the program

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>program vision</i> , and organisation mission and values	<p>Program vision may depend on:</p> <ul style="list-style-type: none"> client needs and requirements organisational vision, mission and values program purpose.
1.3 Assist <i>relevant stakeholders</i> to develop and sustain the documented program vision	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors, team members).
2.4 Develop program <i>socially responsible practice policies and procedures</i> to guide team members to report breaches of socially responsible practice	<p>Socially responsible practice policies and procedures may relate to:</p> <ul style="list-style-type: none"> anti-discrimination diversity and inclusion privacy and confidentiality reporting and escalation work health and safety (WHS).
2.5 Develop <i>risk management plan and strategies</i>	<p>Risk management plans and strategies may include:</p> <ul style="list-style-type: none"> continuous monitoring and communication (e.g. risk audit and reviews) project risk frameworks risk indicators risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) risk registers strategies to minimise negative impacts (e.g. in planning or implementation stages).
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) program plans regulations.



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BSBPMG633 Provide leadership for the program**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Choose and apply interpersonal and <i>leadership styles</i> according to situation	Leadership styles may include: <ul style="list-style-type: none"> • affiliative • autocratic • authoritative • democratic • laissez-faire.
Design <i>knowledge management methods and processes</i>	Knowledge management methods and processes may include: <ul style="list-style-type: none"> • continuous improvements and feedback • leveraging knowledge articles and industry representatives • program management software systems.
Knowledge Evidence	Notes
<i>Behavioural models</i> for the role of program manager	Behavioural models may include: <ul style="list-style-type: none"> • Maslow's hierarchy of needs • Theory X and Theory Y • two-factor theory.
Program <i>benefits</i>	Benefits may include: <ul style="list-style-type: none"> • enhancing customer satisfaction and experience • establishing and growing stakeholder relationships and networks • improving brand reputation • increasing revenue, profit and productivity.
Strategies relevant to program management including: <ul style="list-style-type: none"> • communication and negotiating styles and approaches • <i>ethics, equity and fairness norms, regulations and legislation</i> • learning and development methods and strategy • <i>risk management plan and strategies</i> • types and formats for program vision. 	Ethics, equity and fairness norms, regulations and legislation may include: <ul style="list-style-type: none"> • Fair Work Act 2009. Risk management plans and strategies may include: <ul style="list-style-type: none"> • continuous monitoring and communication (e.g. risk audit and reviews) • project risk frameworks • risk indicators • risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) • risk registers • strategies to minimise negative impacts (e.g. in planning or implementation stages).
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to program leadership	Workplace documentation may include: <ul style="list-style-type: none"> • organisational policies and procedures • program initiation documents • program plans.



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BSBPMG634 Facilitate stakeholder engagement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	BSB60120 Advanced Diploma of Business BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Engage with <i>pertinent stakeholders</i> and agree on communication approaches in accordance with organisational policies and procedures	<p>Pertinent stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. project managers, program managers, portfolio managers, project sponsors, team members).
3.2 Assess <i>effectiveness of stakeholder interaction</i> according to program objectives and organisational policies and procedures	<p>Assessing effectiveness of stakeholder interaction may involve:</p> <ul style="list-style-type: none"> conducting stakeholder feedback surveys stakeholder mapping and prioritisation.
Foundation Skills	Notes
Reading: Organises, evaluates and critiques ideas and information from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) project and program plans regulations.
Writing: Develops a range of <i>project related documents</i> using appropriate format, vocabulary and structure	<p>Project related documents may include:</p> <ul style="list-style-type: none"> project plans and charters stakeholder communication and engagement plans status reports.
Planning and organising: Identifies issues and uses <i>analytical techniques</i> to generate and evaluate possible solutions and to make decisions	<p>Analytical techniques may include:</p> <ul style="list-style-type: none"> Ishikawa diagrams pareto analysis root cause analysis.
Performance Evidence	Notes
Use different <i>communication approaches</i> in different stakeholder contexts	<p>Communication approaches may include:</p> <ul style="list-style-type: none"> interactive communication (e.g. workshops) verbal communication (e.g. meetings, telephone calls) written communication (e.g. emails, status reports, reports).



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BSBPMG634 Facilitate stakeholder engagement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	BSB60120 Advanced Diploma of Business BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Features of <i>engagement models</i> , benefits and applications	<p>Engagement models may involve:</p> <ul style="list-style-type: none"> defining engagement levels determining engagement channels stakeholder identification, segmentation and prioritisation.
<i>Forms and methods of stakeholder engagement</i>	<p>Forms and methods of stakeholder engagement may include:</p> <ul style="list-style-type: none"> consultations focus groups interviews meetings surveys.
Features of several <i>means, media and methods of communication</i>	<p>Means, media and methods of communication may relate to:</p> <ul style="list-style-type: none"> interactive communication (e.g. workshops) verbal communication (e.g. meetings, telephone calls) written communication (e.g. emails, status reports, reports).
Features of various <i>types and roles of program stakeholders</i>	<p>Types of program stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. project managers, program managers, portfolio managers, project sponsors, team members). <p>Roles of program stakeholders:</p> <ul style="list-style-type: none"> budget tracking communicating and collaborating with stakeholders cost management overall program management task and activity delivery.
Features of relevant <i>organisation policies and procedures</i> program and organisational objectives	<p>Organisation policies and procedures may relate to:</p> <ul style="list-style-type: none"> anti-discrimination communication diversity and inclusion privacy and confidentiality reporting and escalation.
Assessment Conditions	Notes
Access to examples of program <i>stakeholder engagement processes and interaction</i>	<p>Stakeholder engagement processes and interactions may relate to:</p> <ul style="list-style-type: none"> allocating resources decision-making funding risk analysis and mitigation.



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BSBPMG635 Implement program governance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Negotiate and communicate clear roles and responsibilities to all <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, suppliers, contractors vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors, team members).
1.4 Make decisions regarding complex priorities and competing demands using <i>repeatable methods</i>	<p>Repeatable methods may include using:</p> <ul style="list-style-type: none"> Ishikawa diagrams pareto analysis root cause analysis.
2.1 Establish <i>systems and processes</i> according to program objectives	<p>Systems and processes may relate to:</p> <ul style="list-style-type: none"> communication cost management decision-making project management reporting.
2.2 Implement <i>management control systems</i> for monitoring program progress against organisational objectives	<p>Management control systems may relate to:</p> <ul style="list-style-type: none"> administration implementation and change performance management risk safety and security strategy and planning technology.
2.3 Generate <i>audit documentation</i> , presenting information and distributing reports to key stakeholders	<p>Audit documentation may include:</p> <ul style="list-style-type: none"> checklists planning records procedures performed summaries of findings.
2.4 Establish and monitor <i>process efficiency</i>	<p>Process efficiency may be monitored through:</p> <ul style="list-style-type: none"> non-value add costs and time quality costs resource utilisation total processing time.
3.1 Identify both organisation and external <i>compliance requirements</i> relevant to the program	<p>Compliance requirements may relate to:</p> <ul style="list-style-type: none"> legislative obligations reporting requirements.
3.2 Establish and securely maintain audit records according to <i>legislative requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.



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BSBPMG635 Implement program governance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.3 Report on compliance to <i>relevant authorities and key stakeholders</i>	Relevant authorities and key stakeholders may include: <ul style="list-style-type: none"> clients government bodies.
3.4 Identify and implement <i>actions to rectify non-compliant behaviours, processes and products</i>	Actions to rectify non-compliant behaviours, processes and products may include: <ul style="list-style-type: none"> increasing communication and engagement around compliance setting clear expectations and accountabilities using technology to reduce manual efforts and errors.
4.3 Implement program <i>support protocols</i> within an organisation according to organisational policies	Support protocols may relate to: <ul style="list-style-type: none"> communication work expectations
Performance Evidence	Notes
Compare types of effective <i>program policy</i>	Program policies may relate to: <ul style="list-style-type: none"> communication and engagement organisational policies risks and issues systems and technology.
Knowledge Evidence	Notes
<i>Decision making processes</i> in the program context	Decision making processes may include using: <ul style="list-style-type: none"> Ishikawa diagrams pareto analysis root cause analysis.
<i>Methods to support skill development</i> support within a program	Methods to support skill development may include: <ul style="list-style-type: none"> coaching and mentoring job rotations and shadowing training.
Assessment Conditions	Notes
Workplace <i>documentation</i> and resources relevant to program governance	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures program initiation documents program plans.



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BSBPMG636 Manage benefits**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Devise and agree benefits delivery approach with <i>key stakeholders</i> considering impact of the benefit on <i>risk management, issues management, and change control</i>	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, vendors) internal stakeholders (e.g. program managers, portfolio managers, project sponsors). <p>Risk management, issues management and change control may include:</p> <ul style="list-style-type: none"> continuous monitoring and communication (e.g. risk audit and reviews) project risk frameworks risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) strategies to minimise negative impacts (e.g. in planning or implementation stages).
2.4 Review confirm and update <i>benefits measurement approach</i> and benefits delivery approach	<p>Benefits measurement approaches may include:</p> <ul style="list-style-type: none"> benefits reviews (e.g. benefits realised, future benefits estimation) collecting, consolidating and analysing benefits data.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) program plans regulations.
Planning and organising: Sequences and schedules <i>complex activities</i> , monitors implementation and evaluates results	<p>Complex activities may relate to:</p> <ul style="list-style-type: none"> benefits management program scheduling risk and issue management stakeholder engagement and management.



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BSBPMG636 Manage benefits

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60720 Advanced Diploma of Program Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Components of different <i>benefit delivery models</i>	Benefit delivery models may include: <ul style="list-style-type: none"> benefits drivers and enablers intermediate and end benefits.
<i>Qualitative and quantitative data</i> to assess project and program performance against plans	Qualitative data may relate to: <ul style="list-style-type: none"> employee and stakeholder satisfaction team and client collaboration and communication. Quantitative data may relate to: <ul style="list-style-type: none"> quality sales and revenue.
<i>Techniques used in decision making theory</i> and analysis applied to benefits assessment	Techniques used in decision making theory and analysis may include: <ul style="list-style-type: none"> break-even analysis cost-benefit analysis decision trees financial analysis.
Types and definition of program <i>benefits</i>	Benefits may include: <ul style="list-style-type: none"> enhancing customer satisfaction and experience establishing and growing stakeholder relationships and networks improving brand reputation increasing revenue, profit and productivity.
Workplace identification and <i>documentation of program benefits</i>	Documentation of program benefits may include: <ul style="list-style-type: none"> benefits management plan and framework.
Relationship between program delivery and <i>benefits realisation approaches</i>	Benefits realisation approaches may involve: <ul style="list-style-type: none"> evaluating benefits identifying and structuring benefits planning benefits realisation realising and tracking benefits.
Assessment Conditions	Notes
Access to examples of program <i>workplace documentation</i> related to attaining program benefits	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures program initiation documents program plans.



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BSBPMG637 Engage in collaborative alliances

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and evaluate opportunities for <i>collaborative alliances</i> according to organisational and program objectives	Collaborative alliances may involve: <ul style="list-style-type: none"> mutual goals and objectives sharing resources (e.g. finances, knowledge, staff).
2.1 Initiate, negotiate, agree and document a collaborative approach with parties which adhere to organisational policies and relevant <i>legal requirements</i>	Legal requirements may relate to: <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
2.3 Develop <i>collaboration plans</i> for each agreement to support implementation	Collaboration plans may include: <ul style="list-style-type: none"> actions to support smooth collaboration quality improvement activities planned collaboration and working approaches team configurations.
3.2 <i>Assess performance</i> of all parties to an agreement against organisational and program objectives and expected results, and address variances	Assessing performance may involve: <ul style="list-style-type: none"> conducting interviews and surveys developing progress reports measuring performance against agreed key performance indicators (KPIs).
Performance Evidence	Notes
Employ <i>environment scanning techniques</i> to identify opportunities for collaboration that are aligned to desired program outcomes	Environment scanning techniques may include: <ul style="list-style-type: none"> environmental analysis (e.g. PESTEL and SWOT) interviews and focus groups market research.
Knowledge Evidence	Notes
Features of <i>methods to maintain and sustain alliances</i>	Methods to maintain and sustain alliances may include: <ul style="list-style-type: none"> assigning designated points of contact making upfront agreements and decisions (e.g. plans and resource allocations) setting mutual goals and objectives understanding individual party needs.
<i>Negotiating strategies</i>	Negotiating strategies may include: <ul style="list-style-type: none"> accommodating avoiding collaborating competing compromising.



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BSBPMG637 Engage in collaborative alliances**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Types of <i>collaboration agreements</i>	Collaboration agreements may involve: <ul style="list-style-type: none"> defining the relationship and its purpose setting out roles and responsibilities standard terms and conditions.
<i>Strategies to review collaborative agreements</i> in relation to program objectives	Strategies to review collaborative agreements may include: <ul style="list-style-type: none"> collaborating compromising negotiating.
Assessment Conditions	Notes
Access to <i>workplace documentation</i> regarding collaborative alliances	Workplace documentation may include: <ul style="list-style-type: none"> collaborative agreements and contracts organisational policies and procedures program initiation documents program plans.



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BSBPMG810 Prioritise projects and programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Capture <i>macro-level project and program information</i> for every project and program within the project portfolio	Macro-level project and program information may include: <ul style="list-style-type: none"> • approvals needed • critical project and program milestones and deadlines • key meetings and stakeholder engagement (e.g. steering committee meetings).
2.2 Identify and assess <i>key drivers, internal and external sources of impact</i> for projects and programs within the portfolio	Key drivers, internal and external sources of impact may include: <ul style="list-style-type: none"> • budgets and finances • competitor actions • effective project management techniques and practices (e.g. risk and issue management, open communication) • project managers and team • project sponsor investment.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project, program and portfolio plans • regulations.
Performance Evidence	Notes
Develop a <i>program and project register</i>	Program and project registers may include: <ul style="list-style-type: none"> • key dates and timelines • milestones • reviews and approvals.
Prepare a <i>portfolio charter</i>	Portfolio charters may include: <ul style="list-style-type: none"> • intended end-result and deliverables • project, program and portfolio purpose and objectives • project, program and portfolio scope.



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BSBPMG810 Prioritise projects and programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Formalised tools and processes</i> to capture and collate information	Formalised tools and processes may relate to: <ul style="list-style-type: none"> • communication • document and file management • organisational templates • stakeholder engagement.
Steps in an organisational <i>prioritisation method</i>	Prioritisation methods may involve: <ul style="list-style-type: none"> • Balanced Scorecard (BSC) • earned value analysis (EVA) • internal rates of return (IRR) • net present value (NPV) • payback periods.
<i>Review and decision-making processes</i> used to determine the alignment of projects and programs to various strategic themes	Review and decision-making processes may follow: <ul style="list-style-type: none"> • organisational policies and procedures • project, program and portfolio reporting lines.
Examples of how <i>internal</i> and <i>external environmental factors</i> are considered in projects and programs	Internal environmental factors may include: <ul style="list-style-type: none"> • business needs • organisational culture, vision, mission and values • organisational plans, policies and procedures • resources (e.g. financial, marketing). External environmental factors may include: <ul style="list-style-type: none"> • economic trends • legislation • social and cultural trends • technology.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> • organisational policies and procedures • project, program and portfolio initiation documents • project, program and portfolio plans.



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BSBPMG811 Select and balance the portfolio

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review business case for each project and program according to task requirements to capture <i>interfaces</i> , emergent risks, resource requirements, business benefits and their timings	Interfaces may include: <ul style="list-style-type: none"> • program systems and software • reporting and review periods • stakeholder engagement • work packages and deliverables.
2.3 Commission <i>feasibility studies</i> in instances where additional analysis is required to determine investment merit	Feasibility studies may involve: <ul style="list-style-type: none"> • economic feasibility • operational feasibility • schedule feasibility • technical feasibility.
2.5 Determine the budget or <i>financial profile</i> for each project and program	Financial profiles may depend on: <ul style="list-style-type: none"> • balance sheets • cash flows • income statements.
3.2 Review the organisations ideal project and program mix and calibrate the <i>project selection model</i>	Project selection models may involve: <ul style="list-style-type: none"> • benefit measurements methods (e.g. benefit-cost ratios, net present value [NPV]) • constrained optimisation methods (e.g. linear programming).
4.1 Review and update the project and program <i>approval process</i>	Approval processes may involve reviewing: <ul style="list-style-type: none"> • budgets and finances • key milestones and timelines • project purpose and scope • resource requirements.

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project, program and portfolio plans • regulations.
Writing: Documents results of <i>screening and selection processes</i>	Screening and selection processes may relate to: <ul style="list-style-type: none"> • costs and benefits • organisational vision, mission and values • organisational strategic goals and plans • resource availability and requirements.
Writing: Develops documents to <i>communicate results</i> of selection process using appropriate formats and vocabulary	Communicating results may involve: <ul style="list-style-type: none"> • meetings • presentations • witten reports.



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BSBPMG811 Select and balance the portfolio

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Prepare a <i>dependency map</i>	Dependency maps may enable: <ul style="list-style-type: none"> • coordination and synchronisation across interdependencies • more effective integration of different project work packages.
Prepare a detailed <i>project register</i> for a portfolio explaining selection, appraisal and approval monitoring	Project registers may include: <ul style="list-style-type: none"> • key dates and timelines • milestones • reviews and approvals.
<i>Monitor and control the status of project and program approvals</i>	Monitoring and controlling the status of project and program approvals may involve: <ul style="list-style-type: none"> • holding regular meetings with relevant stakeholders • using status reports.
Knowledge Evidence	Notes
<i>Business cases review process</i>	Business case review processes may involve analysing: <ul style="list-style-type: none"> • costs and benefits • project and program mix • project purpose and objectives.
<i>Key analysis methods and techniques</i>	Analysis methods and techniques may include: <ul style="list-style-type: none"> • diagnostic • prescriptive • statistical.
<i>Process to cancel or put on hold those projects and programs currently underway that have been rejected from the portfolio</i>	Process to cancel or put on hold may include: <ul style="list-style-type: none"> • clear communications to teams • producing required reports and documentation • seeking approvals from delegated authorities.
<i>Criterion prioritisation models</i>	Criterion prioritisation models may incorporate: <ul style="list-style-type: none"> • defining low, medium and high scores • weighting criteria importance.
<i>Supply and demand concepts</i>	Supply and demand concepts may relate to: <ul style="list-style-type: none"> • consumer preferences and purchasing behaviours • prices of products and services • resource availability.
Methods to determine organisational <i>human resources capacity</i>	Human resources capacity may relate to: <ul style="list-style-type: none"> • workforce capability • workforce capacity.
Structure and use of <i>business cases</i> and feasibility studies	Business cases may include: <ul style="list-style-type: none"> • problem statements • proposed solutions and recommendations • purpose, objectives and scope.



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BSBPMG811 Select and balance the portfolio**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Workplace documentation</i> and resources	Workplace documentation may include: <ul style="list-style-type: none"> • business cases • dependency maps • financial statements • organisational policies and procedures • project, program and portfolio initiation documents • project, program and portfolio plans.



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BSBPMG812 Manage and review portfolio performance

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Align the <i>portfolio review cycle</i> with appropriate project or program review points	<p>Portfolio review cycles may involve:</p> <ul style="list-style-type: none"> examining project and program deliverables monitoring project and program inter-dependencies.
1.2 Review project and program performance against respective plans and measure performance against continuously captured <i>qualitative</i> and <i>quantitative data</i>	<p>Qualitative data may relate to:</p> <ul style="list-style-type: none"> employee and stakeholder satisfaction team and client collaboration and communication. <p>Quantitative data may relate to:</p> <ul style="list-style-type: none"> quality sales and revenue.
2.2 Assess portfolio value and contribution to strategic priorities through the monitoring and review of <i>key performance indicator measures</i>	<p>Key performance indicator measures may include:</p> <ul style="list-style-type: none"> income net profit return on investment (ROI) revenue growth.
3.1 Prepare and update portfolio delivery map showing the key timings and <i>inter-dependencies between projects and programs</i> and the associated benefits to be produced	<p>Inter-dependencies between projects and programs may relate to:</p> <ul style="list-style-type: none"> resources (e.g. financial, knowledge, staff) technology and systems (e.g. program and portfolio management and scheduling tools).
Foundation Skills	Notes
Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) portfolio plans regulations.
Prepares <i>documents to support portfolio management</i> using format and vocabulary suitable to audience	<p>Documents to support portfolio management may include:</p> <ul style="list-style-type: none"> benefits management plan portfolio plans and schedules risk management plans and frameworks.
Performance Evidence	Notes
Respond to <i>signs and symptoms of project/program failure and underperformance</i>	<p>Signs and symptoms of project/program failure and underperformance may include:</p> <ul style="list-style-type: none"> cultural and ethical misalignment inadequate documentation and tracking mechanisms ineffective communication channels inexperienced project and program managers poor preparation and planning.



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BSBPMG812 Manage and review portfolio performance**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Portfolio review matrix</i> , including the collection of qualitative and quantitative data and other metrics	Portfolio reviews matrices may relate to: <ul style="list-style-type: none"> competitive position (e.g. market share) industry attractiveness (e.g. growth rate).
Cross project or program <i>dependency map</i>	Dependency maps may enable: <ul style="list-style-type: none"> coordination and synchronisation across interdependencies more effective integration of different project work packages.
Project or program <i>performance report</i> or audit	Performance reports may include: <ul style="list-style-type: none"> progress reports resource utilisation reports status reports variance reports.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> dependency maps organisational policies and procedures performance reports portfolio initiation documents portfolio plans.



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BSBPMG813 Govern the portfolio

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Develop disciplined <i>governance arrangements</i> for projects and programs within the portfolio	<p>Governance arrangements may include implementing effective:</p> <ul style="list-style-type: none"> • processes • structures • systems.
1.2 Develop <i>business strategy</i> according to project portfolio	<p>Business strategies may relate to:</p> <ul style="list-style-type: none"> • costs and benefits • growth • product and service differentiation.
1.3 Verify that all projects and programs within the portfolio have an approved plan prepared to organisational and <i>legislative requirements</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Commonwealth Procurement Rules 20 April 2019 • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
1.4 Verify decision-making competence of members of <i>delegated authorisation bodies</i>	<p>Delegated authorisation bodies may include:</p> <ul style="list-style-type: none"> • boards • project sponsors • portfolio managers.
2.2 Apply disciplined governance arrangements, supported by appropriate <i>methods and controls</i> , to projects and programs within the portfolio	<p>Methods and controls may include:</p> <ul style="list-style-type: none"> • board review of strategy, performance, policies and procedures • internal audits • mandatory reporting.
2.5 Support executive management to ensure appropriate <i>independent assurance of projects/programs</i> occurs	<p>Independent assurance of projects/programs may involve:</p> <ul style="list-style-type: none"> • conducting audits on project and program plans • forecasting performance • identifying critical success factors.

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • portfolio plans • regulations.
Writing: Develops <i>governance documentation</i> using organisational formats and vocabulary suitable for the audience	<p>Governance documentation may include:</p> <ul style="list-style-type: none"> • codes of conduct • governance guidelines and plans • policies and procedures.



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BSBPMG813 Govern the portfolio**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB80220 Graduate Diploma of Portfolio Management	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Apply a decision-making matrix with suitable <i>criteria</i>	Criteria may relate to: <ul style="list-style-type: none"> costs and benefits ease of implementation risks scalability.
Knowledge Evidence	Notes
Project, program and corporate <i>governance models</i>	Governance models may involve: <ul style="list-style-type: none"> identifying and documenting key milestones, deliverables and tasks outlining reporting lines and decision-making frameworks.
Methods to incorporate <i>legislative, regulatory or business requirements</i> and changes into portfolio management decisions and controls	Incorporate legislative, regulatory or business requirements may relate to: <ul style="list-style-type: none"> Commonwealth Procurement Rules 20 April 2019 Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.
Content and requirements of approved <i>plans</i>	Plans may include: <ul style="list-style-type: none"> benefit management plans contingency plans governance plans portfolio plans risk management plans.
Suitable <i>methods to communicate the governance requirements</i> to subordinates	Methods to communicate the governance requirements may include through: <ul style="list-style-type: none"> distributing written procedures and reports meetings and presentations.
<i>How portfolio decisions are made and supported</i>	How portfolio decisions are made and supported may include following: <ul style="list-style-type: none"> contracts and agreements decision-making frameworks organisational policies and procedures reporting lines.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures portfolio and governance plans portfolio initiation documents.



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BSBPMG814 Lead the portfolio

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Justify <i>portfolio management resourcing</i> at prescribed intervals according to task requirements	Portfolio management resourcing may depend on: <ul style="list-style-type: none"> capabilities portfolio plans and schedules resource availability and accessibility.
2.1 Establish a <i>portfolio vision</i>	Portfolio visions may consider: <ul style="list-style-type: none"> decisions to be made in the short and long-term desired future state.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> Australian and industry standards legislation organisational and industry codes of practice organisational policies and procedures organisational strategy and goals (e.g. strategic plans) project, program and portfolio plans regulations.
Writing: Prepares <i>documents to support portfolio management</i> resourcing using organisational formats and project specific vocabulary	Documents to support portfolio management may include: <ul style="list-style-type: none"> organisational policies and procedures portfolio and governance plans portfolio initiation documents.
Performance Evidence	Notes
Act as a role model and <i>portfolio champion</i> within the organisation	Portfolio champions may be required to: <ul style="list-style-type: none"> advise on best practice identify strategic objectives provide portfolio oversight.
Knowledge Evidence	Notes
The application of <i>team management techniques and strategies</i>	Team management techniques and strategies may include: <ul style="list-style-type: none"> project network diagrams project slack and float understanding project critical path.
<i>Performance management</i> within a team	Performance management may include: <ul style="list-style-type: none"> analysing return on investment (ROI) individual team member performance measurement (e.g. according to performance management plans) measuring against baseline time and costs tracking key performance indicators (KPIs) and milestones.



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BSBPMG814 Lead the portfolio**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Content and development of a <i>portfolio vision</i> including: <ul style="list-style-type: none"> • strategic plan • vision statement • charter • business plan 	Portfolio visions may consider: <ul style="list-style-type: none"> • decisions to be made in the short and long-term • desired future state.
<i>Motivation and leadership theories</i>	Motivation and leadership theories may relate to: <ul style="list-style-type: none"> • Maslow's hierarchy of needs • Theory X and Theory Y • two-factor theory.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> • organisational policies and procedures • portfolio and governance plans • portfolio initiation documents.



BSBPMG815 Manage portfolio communications and change

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Develop and review a <i>portfolio communications strategy</i> , for use by portfolio staff	<p>Portfolio communications strategies may involve:</p> <ul style="list-style-type: none"> • communication channels • formal and informal communications • individual or group-based communications • written, verbal and visual communications.
1.2 Capture and manage information on projects and programs that comprise the portfolio and their status using a <i>portfolio management information system</i>	<p>Portfolio management information systems may involve:</p> <ul style="list-style-type: none"> • financial statements • individual tasks and activities • software integration and interaction • workflow management.
1.3 Verify <i>progress reports</i> to executive management show achievement or non-achievement toward strategic objectives	<p>Progress reports may include:</p> <ul style="list-style-type: none"> • activities and tasks completed • milestones achieved • problems encountered.
1.4 Communicate <i>project selection criteria</i> and project selection model throughout the organisation	<p>Project selection criteria may relate to:</p> <ul style="list-style-type: none"> • business priority • customer and client impact • probability of success • resource and data availability.
1.5 Integrate portfolio <i>data collection processes and systems</i> into organisational processes and systems	<p>Data collection processes and systems may involve:</p> <ul style="list-style-type: none"> • conducting surveys • holding interviews • reviewing documents and records.
2.2 Consider <i>internal and external stakeholder</i> needs in portfolio mix	<p>Internal stakeholder may include:</p> <ul style="list-style-type: none"> • portfolio managers • program managers • project managers • team members. <p>External stakeholders may include:</p> <ul style="list-style-type: none"> • contractors • clients • suppliers • vendors.
3.1 Identify and communicate <i>criteria to evaluate portfolio management success</i>	<p>Criteria to evaluate portfolio management success may relate to:</p> <ul style="list-style-type: none"> • costs and benefits • ease of implementation • risks • scalability.
3.2 Forward <i>portfolio management reports</i> containing strategic information of portfolio status and progress to key project stakeholders according to task requirements	<p>Portfolio management reports may relate to:</p> <ul style="list-style-type: none"> • governance structures and reporting processes • project and program status • resource availability and allocation • risks and issues management • tracking finances.



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BSBPMG815 Manage portfolio communications and change

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project, program and portfolio plans • regulations.
Planning and organising: Uses <i>digital tools</i> to access, organise and analyse information for strategic purposes	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • databases (e.g. customer relationship management [CRM] databases) • project and program management and scheduling tools • spreadsheets.
Performance Evidence	Notes
Undertake executive briefings and presentations on the <i>portfolio management approach</i>	<p>Portfolio management approaches may involve:</p> <ul style="list-style-type: none"> • balancing project and program initiatives and planned change with business-as-usual activities • optimising return on investment (ROI).
Knowledge Evidence	Notes
Influence of organisational politics on <i>portfolio performance</i>	<p>Portfolio performance may be measured by:</p> <ul style="list-style-type: none"> • analysing ROI • portfolio baselines and benchmarks • project and program performance measurements • tracking key performance indicators (KPIs) and milestones.
Importance of <i>negotiation and influencing skills</i>	<p>Negotiation and influencing skills may include the ability to:</p> <ul style="list-style-type: none"> • change others' attitudes, opinions and behaviours • reach agreements and mutual satisfaction with others.
<i>Principles of change management</i> as applied to a portfolio	<p>Principles of change management may include:</p> <ul style="list-style-type: none"> • considering and leveraging organisational culture • engaging all stakeholders in the process • ensuring transparent communication • providing comprehensive training to support the change • using a top-down approach.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	<p>Workplace documentation may include:</p> <ul style="list-style-type: none"> • organisational policies and procedures • portfolio initiation documents • portfolio plans.



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BSBPMG816 Manage portfolio resources

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify project and program <i>resources</i> based on resource forecasts	<p>Resources may include:</p> <ul style="list-style-type: none"> • equipment and materials • finances • human resources • knowledge and information • technology.
1.4 Develop, review and update a <i>portfolio resource strategy</i> based on the status of projects and programs in the portfolio	<p>Portfolio resource strategies may relate to:</p> <ul style="list-style-type: none"> • effective resource allocations • resource availability.
2.4 Implement <i>strategies to resolve human resource deficiencies</i> and imbalances	<p>Strategies to resolve human resource deficiencies and imbalances may involve:</p> <ul style="list-style-type: none"> • contingency planning • hiring contractors • flexible project and program cultures • open and transparent communication practices.
3.4 Take appropriate <i>action to resolve the identified resource constraints</i> according to organisational strategic priorities	<p>Actions to resolve the identified resource constraints may involve:</p> <ul style="list-style-type: none"> • prioritising work projects and activities • reallocating resources • setting clear expectations.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project, program and portfolio plans • regulations.
Planning and organising: Uses <i>problem-solving processes</i> to identify and analyse program resource issues, and decide on appropriate response	<p>Problem-solving processes may include using:</p> <ul style="list-style-type: none"> • decision trees • five whys • root cause analysis • trial and error.



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BSBPMG816 Manage portfolio resources**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Undertake <i>skills assessment</i> and identify solutions	Skills assessments may involve: <ul style="list-style-type: none"> assessing individual and team capabilities conducting skills gap analysis.
Prepare <i>resource utilisation calculations</i> from collection techniques	Resource utilisation calculations may include: <ul style="list-style-type: none"> busy time / available time planned working hours / available hours recorded working hours / available hours.
Knowledge Evidence	Notes
<i>Human resource allocation models</i>	Human resource allocation models may be based on: <ul style="list-style-type: none"> project and program priority skills required staff capabilities and experience.
<i>Strategic human resource management approaches</i>	Strategic human resource management approaches may be based on: <ul style="list-style-type: none"> effective employee utilisation employee output and performance employee wellbeing and satisfaction.
Requirements to coordinate cross-organisational resource assignment including: <ul style="list-style-type: none"> <i>risk requirements</i> <i>quality requirements</i> 	Risk requirements may relate to: <ul style="list-style-type: none"> compliance with legislation and regulations financial risk operational risk reputational risk. Quality requirements may relate to: <ul style="list-style-type: none"> availability and useability consistency customer and client expectations reliability.
<i>Workforce planning methods</i>	Workforce planning methods may involve: <ul style="list-style-type: none"> analysing current workforce determining future workforce needs gap analysis between current and desired future workforces.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> organisational policies and procedures portfolio initiation documents project, program and portfolio plans.



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BSBPMG817 Manage portfolio risk

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Establish and review standards and <i>procedures for portfolio risk management</i> according to task requirements	<p>Procedures for portfolio risk management may include:</p> <ul style="list-style-type: none"> • analysing and evaluating risks • identifying risks • monitoring and reviewing risks • ranking and prioritising risks • treating risks.
1.2 Integrate the portfolio risk management approach with <i>organisational risk management systems and strategies</i>	<p>Organisational risk management systems and strategies may be defined in:</p> <ul style="list-style-type: none"> • codes of practice • policies and procedures.
2.1 Calculate overall portfolio risk profile and organisational exposure using results from <i>project and program risks analysis</i>	<p>Project and program risk analysis may involve using:</p> <ul style="list-style-type: none"> • risk management frameworks • risk matrices • risk registers.
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>complex texts</i>	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • Australian and industry standards • legislation • organisational and industry codes of practice • organisational policies and procedures • organisational strategy and goals (e.g. strategic plans) • project, program and portfolio plans • regulations.
Planning and organising: <i>Stores results</i> from risk analysis to enable future access	<p>Storing results may involve:</p> <ul style="list-style-type: none"> • considering data security, privacy and confidentiality requirements • using technology and digital systems (e.g. program management software).
Performance Evidence	Notes
Develop <i>risk management plans</i>	<p>Risk management plans may include:</p> <ul style="list-style-type: none"> • risk management frameworks • risk prevention strategies (e.g. avoiding, accepting, mitigating, transferring risk) • strategies to minimise negative impacts (e.g. in planning or implementation stages).



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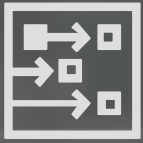
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BSBPMG817 Manage portfolio risk**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB80220 Graduate Diploma of Portfolio Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Risk management theory</i>	Risk management theory may relate to: <ul style="list-style-type: none"> • risk acceptance and retention • risk avoidance • risk reduction and mitigation • risk sharing and transfer.
Australian and international <i>risk management standards</i>	Risk management standards may include: <ul style="list-style-type: none"> • International Organisation for Standardisation (ISO) standards for Risk Management (e.g. ISO 31000:2018).
Enterprise <i>risk management approaches</i>	Risk management approaches may involve using: <ul style="list-style-type: none"> • risk management frameworks • risk matrices • risk registers.
Assessment Conditions	Notes
<i>Workplace documentation</i> and resources relevant to performance evidence	Workplace documentation may include: <ul style="list-style-type: none"> • organisational policies and procedures • portfolio initiation documents • portfolio plans • risk management plans.



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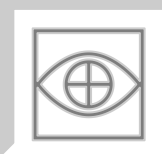
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Procurement Unit Sector Overview

The Procurement (PRC, PUR) unit sector incorporates specialist units of competency aimed at supporting individuals in a range of industries and job roles to coordinate and manage the procurement function of an organisation.

Procurement workers source and coordinate the strategic contracting of goods and services providers for organisations. These units of competency prepare workers for job roles that include identifying supply sources, preparing purchase orders, receiving and checking purchase requests, checking inventories and preparing delivery schedules. Organisations may have internal procurement employees, or may hire procurement specialists for a specific reason, such as developing and implementing specific strategies and plans.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Procurement Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Procurement' unit stream, please refer to the interpretation guidance provided on pages 508 - 520. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBPUR301 Purchase goods and services**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	BSBSS00120 Administrative Assistant Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Determine own role and <i>limits of authority</i> in consultation with <i>relevant personnel</i>	<p>Limits of authority may relate to:</p> <ul style="list-style-type: none"> approval processes (e.g. purchasing or expenditure) public representation of organisation. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> colleagues heads of department (e.g. finance, marketing) management and senior management supervisors.
3.2 Advise relevant personnel of <i>receipt of purchase</i>	<p>Receipt of purchase may include:</p> <ul style="list-style-type: none"> goods receipt notification (GRN). <p>Advising relevant personnel may be automatically undertaken through an internal finance system.</p>
Foundation Skills	Notes
Navigate the world of work: Adheres to <i>organisational procedures and policies</i>	<p>Organisational procedures and policies may relate to:</p> <ul style="list-style-type: none"> contract arrangements and templates recordkeeping for purchasing and assets segregation of duties.
Assessment Conditions	Notes
Purchasing strategies and <i>relevant purchasing records</i>	<p>Relevant purchasing records may relate to:</p> <ul style="list-style-type: none"> balanced scorecards outlining supplier performance invoices, statements and payment requests petty cash vouchers purchase requests and orders supplier records.



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BSBPRC401 Plan procurement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Obtain specifications for goods and services to be procured from <i>relevant personnel</i> and clarify as required	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> internal stakeholders (e.g. budget owners, senior management, finance team) subject matter experts. <p>Specifications may be obtained from the personnel mentioned above as they will own the outcomes of procurement planning.</p>
3.3 <i>Review suppliers against procurement requirements and organisational protocols</i>	<p>Reviewing suppliers against procurement requirements may relate to:</p> <ul style="list-style-type: none"> contract duration safety procedures for specific procurement activities sustainability criteria. <p>Reviewing suppliers against organisational protocols may relate to:</p> <ul style="list-style-type: none"> legal and contractual obligations organisational risk management framework and risk tolerances strategic organisational goals. <p>Supplier review may depend on the nature of the procurement outcome (e.g. a panel arrangement).</p>
3.4 Make recommendations about preferred offers, seek and obtain approval from <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> internal stakeholders (e.g. senior management, finance teams, chief financial officers, heads of relevant divisions within organisation) subject matter experts (only during evaluation process).
Foundation Skills	Notes
Get the work done: Uses the main features and functions of <i>digital tools</i> to complete work tasks	<p>Digital tools may include:</p> <ul style="list-style-type: none"> e-procurement and e-tendering systems (features and functions may include accessing spend data and historical pricing for benchmarking purposes) email systems enterprise resource planning (ERP) systems virtual meeting technology.



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BSBPRC401 Plan procurement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key principles and practices of planning procurement activities for goods and/or services</i>	<p>Key principles and practices of planning procurement activities may relate to:</p> <ul style="list-style-type: none"> category plans plan templates obtained from professional procurement bodies (e.g. Chartered Institute of Procurement and Supply [CIPS]).
<i>Key features of routine procurement plans</i>	<p>Key features of routine procurement plans may include:</p> <ul style="list-style-type: none"> category benchmark analysis key performance indicators (e.g. savings targets) market analysis targets in supply chain (e.g. diversity targets).
Assessment Conditions	Notes
<i>Procurement strategies and relevant procurement records</i>	<p>Procurement strategies may relate to:</p> <ul style="list-style-type: none"> analysis of previous spend and associated suppliers benchmarking analysis market analysis organisational changes (e.g. from a panel to a single supplier). <p>Relevant procurement records may include:</p> <ul style="list-style-type: none"> spending records supplier records.



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BSBPRC402 Negotiate contracts

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Prepare for contract negotiation and research <i>supplier organisation information, regulatory constraints and unique category considerations</i>	<p>Supplier organisation information researched at the point of contract negotiation would likely be finalising information, such as corporate social responsibility (CSR) initiatives.</p> <p>Regulatory constraints may relate to:</p> <ul style="list-style-type: none"> ● data use ● privacy and confidentiality ● tenderer practices regarding: <ul style="list-style-type: none"> ○ environmental impacts ○ labour regulations, including ethical employment practices ○ work health and safety (WHS). <p>Unique category considerations may relate to:</p> <ul style="list-style-type: none"> ● licensing negotiation limitations ● pricing limitations.
1.4 Identify <i>risks associated with contract negotiations</i>	<p>Risks associated with contract negotiations:</p> <ul style="list-style-type: none"> ● may include: <ul style="list-style-type: none"> ○ deviations from organisation's risk management framework and tolerances ○ privacy and confidentiality risks (e.g. customer data). ● are likely to be specific to type of category or spend that is being negotiated, for example: <ul style="list-style-type: none"> ○ risks associated with goods may relate to modern slavery issues ○ risks associated with services may relate to implementing tiered or fixed pricing structures to reduce scope creep.
3.2 Define and evaluate the <i>attributes of a good negotiator</i> and apply them to effective negotiations	<p>Attributes of a good negotiator may include:</p> <ul style="list-style-type: none"> ● preparing for each negotiation ● understanding 'walk-away' position ● understanding what a win is for the supplier ● using active listening ● using probing and specific questioning techniques ● remaining focused and truthful.
3.4 Use verbal and <i>non-verbal communications in negotiation situations</i> including reducing the potential for conflict	<p>Non-verbal communications in negotiation situations may include:</p> <ul style="list-style-type: none"> ● body language (e.g. crossing arms, leaning forward, posture, gestures) ● eye contact and facial expressions ● tone of voice.



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BSBPRC402 Negotiate contracts

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Develop and discuss the <i>legalities</i> and <i>commercial considerations</i> linked to the contract in accordance with organisational requirements	<p>Legalities may include:</p> <ul style="list-style-type: none"> internal organisational contract templates legal and risk checklists. <p>Commercial considerations may include:</p> <ul style="list-style-type: none"> rate cards rebates thresholds to be met unique scope of individual projects.
3.4 Advise <i>relevant stakeholders</i> of contract requirements	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> finance teams relationship managers for suppliers.
Knowledge Evidence	Notes
Key provisions of <i>relevant legislation, codes of practice and national standards that affect procurement of goods and/or services</i>	<p>Relevant legislation, codes of practice and national standards that affect procurement may relate to the following considerations:</p> <ul style="list-style-type: none"> environmental impact ethical employment insurance professional indemnity public and product liability work health and safety.



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BSBPRC403 Conduct international procurement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Research potential sources of supply from relevant <i>information sources</i>	<p>Information sources may include:</p> <ul style="list-style-type: none"> • Austrade • chambers of commerce • peak industry bodies • trade bodies.
1.4 Determine <i>regulations governing international procurement</i>	<p>Regulations governing international procurement may include:</p> <ul style="list-style-type: none"> • biosecurity (e.g. permits, fumigation and quarantine) • free trade agreements • international trade agreements and treaties • labelling requirements • physical inspection requirements • state, federal and relevant international legislation (e.g. Customs Act 1901, Competition and Consumer Act 2010) • tariffs • taxes, fees and duties.
2.1 Obtain and clarify specifications of requirements for international sourcing of specified goods and/ or services from relevant <i>stakeholders</i> as required	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. Department of Home Affairs, Austrade) • internal stakeholders (e.g. finance team, heads of departments)
2.6 Issue invitations to offer to prospective suppliers after gaining approval from <i>relevant personnel</i>	<p>Relevant personnel may include the internal stakeholders listed above.</p>
Knowledge Evidence	Notes
<i>Risk factors</i> and control measures relevant to international procurement	<p>Risk factors may include:</p> <ul style="list-style-type: none"> • deviations from organisation's risk management framework and tolerances • fines and penalties • privacy and confidentiality risks (e.g. customer data).
Assessment Conditions	Notes
<i>Procurement strategies</i> and <i>relevant procurement records</i>	<p>Procurement strategies may relate to:</p> <ul style="list-style-type: none"> • analysis of previous spend and associated suppliers • benchmarking analysis • market analysis • organisational changes (e.g. from a panel to a single supplier). <p>Relevant procurement records may include:</p> <ul style="list-style-type: none"> • spending records • supplier records.



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BSBPRC406 Conduct e-procurement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assess <i>risk and benefits associated with e-procurement</i> of goods and/ or services in accordance with organisational policies and procedures	<p>Risks associated with e-procurement may include:</p> <ul style="list-style-type: none"> change fatigue challenges in measuring benefits of e-procurement integration barriers. <p>Benefits associated with e-procurement may include:</p> <ul style="list-style-type: none"> competitive advantage improved data accuracy increased efficiency and transparency reduced costs reduced waste.
3.4 Assist in consultation of <i>stakeholders</i> to gain buy-in to e-procurement strategies	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> heads of departments senior management training and development teams.
Knowledge Evidence	Notes
<p>Relevant <i>legislation</i> and organisation policies and procedures related to:</p> <ul style="list-style-type: none"> e-procurement terms and conditions for procurement online transactions continuous improvement 	<p>Legislation may include:</p> <ul style="list-style-type: none"> Commonwealth Procurement Rules 2019 free trade agreements international trade agreements and treaties state, federal and relevant international legislation (e.g. Customs Act 1901, Competition and Consumer Act 2010) tariffs taxes, fees and duties.
Assessment Conditions	Notes
<p><i>Procurement strategies</i> and <i>relevant procurement records</i></p>	<p>Procurement strategies may relate to:</p> <ul style="list-style-type: none"> analysis of previous spend and associated suppliers benchmarking analysis market analysis organisational changes (e.g. from a panel to a single supplier). <p>Relevant procurement records may include:</p> <ul style="list-style-type: none"> spending records supplier records tender documents.



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BSBPRC501 Manage procurement strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Undertake consultations with <i>relevant stakeholders and personnel</i> to seek input into procurement strategies	<p>Relevant stakeholders and personnel required for consultation:</p> <ul style="list-style-type: none"> • may include internal individuals responsible for managing relevant relationships and outcomes • may be determined by: <ul style="list-style-type: none"> ○ category plans ○ organisational frameworks ○ strengths, weaknesses, opportunities and threats (SWOT) analysis.
2.1 Analyse and develop procurement strategies, taking into account <i>legal requirements</i> and <i>organisation policies</i>	<p>Legal requirements may relate to:</p> <ul style="list-style-type: none"> • environmental impacts • labour regulations, including ethical employment practices • privacy legislation • work health and safety (WHS). <p>Organisation policies may relate to:</p> <ul style="list-style-type: none"> • business terms and conditions for procurement • contracting and tendering • ethical behaviour.
3.5 Manage <i>performance reporting frameworks</i> to understand efficiency and effectiveness of procurement strategy	<p>Performance reporting frameworks may include reporting on:</p> <ul style="list-style-type: none"> • spend data • balanced scorecard • issues or areas for improvement.
Assessment Conditions	Notes
<i>Procurement strategies</i> and <i>relevant procurement records</i>	<p>Procurement strategies may relate to:</p> <ul style="list-style-type: none"> • analysis of previous spend and associated suppliers • benchmarking analysis • market analysis • organisational changes (e.g. from a panel to a single supplier). <p>Relevant procurement records may include:</p> <ul style="list-style-type: none"> • balance scorecard • performance reports of suppliers • spending records • supplier records.



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BSBPRC502 Manage supplier relationships**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.6 Communicate <i>approved amendments</i> to suppliers and relevant personnel	<p>Approved amendments may be:</p> <ul style="list-style-type: none"> action plans to review performance (often legally binding).
Foundation Skills	Notes
Navigate the world of work: Understands <i>legal and organisational obligations</i> that underpin agreements and contracts with suppliers	<p>Legal and organisational obligations underpinning agreements and contracts with suppliers may be:</p> <ul style="list-style-type: none"> determined with segmentation methods, such as the Kraljic matrix.
Knowledge Evidence	Notes
<i>Key features of procurement supplier relationship management</i>	<p>Key features of procurement supplier relationship management may include:</p> <ul style="list-style-type: none"> balance scorecard with pre-agreed areas in which supplier performance is reported against.
Assessment Conditions	Notes
<i>Procurement strategies and relevant procurement supplier management records</i>	<p>Procurement strategies may relate to:</p> <ul style="list-style-type: none"> analysis of previous spend and associated suppliers benchmarking analysis market analysis organisational changes (e.g. from a panel to a single supplier). <p>Relevant procurement supplier management records may include:</p> <ul style="list-style-type: none"> balanced scorecard performance reports of suppliers.



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BSBPRC503 Manage international procurement**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Research and analyse <i>export regulatory requirements</i> of goods and/ or services to be procured internationally	<p>Export regulatory requirements may relate to:</p> <ul style="list-style-type: none"> • anti-corruption • industry or good / service specific legislation • tax • warranties.
2.1 Communicate international procurement strategies to <i>relevant personnel and stakeholders</i>	<p>Relevant personnel and stakeholders may include:</p> <ul style="list-style-type: none"> • internal stakeholders (e.g. budget owners, senior management, finance teams, chief financial officers, heads of relevant divisions within organisation) • subject matter experts.
5.2 Research and analyse shipping facilities and <i>other transport risks</i>	<p>Other transport risks may include:</p> <ul style="list-style-type: none"> • cold chain • continuity of business services • supply chain specific risks.
5.3 Research and analyse <i>regulatory compliance requirements for importation into Australia</i>	<p>Regulatory compliance requirements for importation into Australia may relate to:</p> <ul style="list-style-type: none"> • biosecurity (e.g. permits, fumigation and quarantine) • free trade agreements • labelling requirements • physical inspection requirements • state and federal legislation (e.g. Customs Act 1901) • tariffs • taxes, fees and duties.
Knowledge Evidence	Notes
<i>Key features of international markets and cultural considerations</i> relevant to procurement in supplier countries	<p>Key features of international markets may include:</p> <ul style="list-style-type: none"> • human rights considerations. <p>Cultural considerations may include:</p> <ul style="list-style-type: none"> • attitudes, beliefs and values • culturally appropriate business relationship requirements.
<i>Key features of methods of payment</i> applicable to international procurement	<p>Key features of methods of payment may include:</p> <ul style="list-style-type: none"> • foreign currency exchange volatility.
Key components of <i>organisational policies and procedures for international procurement</i>	<p>Organisational policies and procedures for international procurement may include:</p> <ul style="list-style-type: none"> • environmental impacts • ethical behaviour and employment practices • organisational contract templates • mandates on the type of competitive process undertaken (e.g. advertising for full and fair opportunity) • privacy and confidentiality • work health and safety (WHS).



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BSBPRC503 Manage international procurement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
Purchasing strategies and <i>relevant purchasing records</i>	Relevant purchasing records may include: <ul style="list-style-type: none">documents relevant to tendering and contract processes.



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BSBPRC504 Manage a supply chain**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Gain commitment of <i>stakeholders</i> to implement supply chain strategy	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> • executive boards • heads of departments • senior management.
1.6 Assign responsibility to monitor supply chain strategy to <i>relevant personnel</i>	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • employees • heads of departments • senior management.
Knowledge Evidence	Notes
Relevant <i>legislation, regulations, standards and organisation policies</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • Competition and Consumer Act 2010 • legislation related to the importation of commodities • state-based Sale of Goods Acts. <p>Regulations may include:</p> <ul style="list-style-type: none"> • environmental protection regulations • employee relations regulations • state-based and Commonwealth work health and safety (WHS) regulations <p>Standards and organisation policies may relate to:</p> <ul style="list-style-type: none"> • Australian Standards and certification requirements • contracts • ethical behaviour • quality assurance • industry and state or territory codes of practice • tenders.
Assessment Conditions	Notes
Supply chain strategies and relevant <i>supply chain management records</i>	<p>Supply chain management records may include:</p> <ul style="list-style-type: none"> • declarations • goods manifests • safety data sheets.



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BSBPRC505 Manage ethical procurement strategy**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	BSBSS00118 Procurement Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Research and identify <i>ethical procurement policies and procedures</i> and their alignment to organisational objectives	Ethical procurement policies and procedures may relate to: <ul style="list-style-type: none"> • conflicts of interest • corporate governance • environmental management • health and safety • integrity, ethics and conduct • labour and human rights • state-based supplier codes of conduct and minimum ethical standards.
Performance Evidence	Notes
Liaise with <i>stakeholders</i> and suppliers to effectively facilitate ethical procurement	Stakeholders may include: <ul style="list-style-type: none"> • manufacturers • relevant impacted communities
Knowledge Evidence	Notes
Key provisions of <i>relevant legislation</i> that affect procurement and contracting	Relevant legislation may include: <ul style="list-style-type: none"> • Commonwealth Procurement Rules 20 April 2019 • Commonwealth Modern Slavery Act 2018 • Government Procurement (Judicial Review) Act 2018 • legislation regarding digital services, tax, senate order and supplier diversity.
<i>Organisational policies and procedures</i> related to: <ul style="list-style-type: none"> • ethical business terms and conditions for procurement • contracting and tendering • supply chain management • procurement 	Organisational policies and procedures may include: <ul style="list-style-type: none"> • environmental impacts • ethical behaviour and employment practices • organisational contract templates • mandates on the type of competitive process undertaken (e.g. advertising for full and fair opportunity) • privacy and confidentiality • work health and safety (WHS).
Assessment Conditions	Notes
<i>Procurement strategies</i> and <i>relevant procurement records</i>	Procurement strategies may relate to: <ul style="list-style-type: none"> • analysis of previous spend and associated suppliers • benchmarking analysis • market analysis • organisational changes (e.g. from a panel to a single supplier). Relevant procurement records may include: <ul style="list-style-type: none"> • balanced scorecard • performance reports of suppliers • spending records • supplier records.



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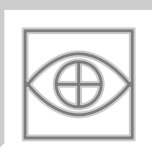
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Business Strategy Unit Sector Overview

The Business Strategy (STR) unit sector incorporates units of competency aimed at supporting individuals in a range of industries to develop skills and knowledge relevant for supporting the strategy of a business or organisation.

Business strategy is an established plan of action designed to achieve a particular goal or set of organisational goals or objectives. It is aimed at strengthening the performance of the enterprise and sets out how business should be conducted to achieve the desired goals.



Glossary of common terminology

Organisational / workplace policies

Organisational / workplace policies represent an overarching course of action adopted by an organisation.

Organisational / workplace procedures

Organisational / workplace procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Business strategy Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Business Strategy' unit stream, please refer to the interpretation guidance provided on pages 528 - 546. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



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BSBSTR301 Contribute to continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Communicate objectives and <i>continuous improvement processes</i> of the organisation to team members	<p>Continuous improvement processes may include:</p> <ul style="list-style-type: none"> regular feedback and planned reviews team meetings understanding organisational policies and procedures using digital cloud-based processes.
1.3 Encourage team members to participate in <i>decision making processes</i> and exercise initiative	<p>Decision making processes may include:</p> <ul style="list-style-type: none"> identifying, evaluating and choosing alternatives information gathering project planning.
3.3 Maintain <i>records, reports and recommendations</i> for improvement within the organisation's systems and processes	<p>Records, reports and recommendations may relate to:</p> <ul style="list-style-type: none"> project plans reviewing organisational data.
Knowledge Evidence	Notes
Principles and techniques relating to <i>benchmarking</i>	<p>Benchmarking may include:</p> <ul style="list-style-type: none"> identifying industry best practice internal benchmarking.
<i>Benefits and barriers to continuous improvement</i>	<p>Benefits to continuous improvement may include:</p> <ul style="list-style-type: none"> building team rapport increasing customer satisfaction increasing efficiency and efficacy. <p>Barriers to continuous improvement may include:</p> <ul style="list-style-type: none"> business risks compliance regulations financial restrictions lack of individual commitment organisational size and structure.
<i>Quality approaches</i> that may be implemented in an organisation	<p>Quality approaches may include:</p> <ul style="list-style-type: none"> compliance checks on benchmarking identifying best practice using a systematic approach to plan.
Assessment Conditions	Notes
<i>Workplace documents and resources</i> relevant to performance evidence	<p>Workplace documents and resources may include:</p> <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBSTR401 Promote innovation in team environments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Assist in evaluating team requirements according to <i>workplace policies and procedures</i>	Workplace policies and procedures may relate to: <ul style="list-style-type: none"> operational plans organisational vision, mission and values project plans.
4.1 Identify <i>criteria to review successful innovation</i> in the workplace	Criteria to review successful innovation may relate to: <ul style="list-style-type: none"> customer satisfaction decreases in absenteeism increases in efficiency key performance indicators (KPIs) productivity improvements sales profitability workforce capability.
Foundation Skills	Notes
Teamwork: Uses <i>inclusive techniques</i> to initiate, contribute and promote discussion amongst potentially diverse team members	Inclusive techniques may include: <ul style="list-style-type: none"> offering a diverse range of opportunities to participate at all levels of the organisation using a diverse range of communication strategies.
Knowledge Evidence	Notes
Types of <i>innovation</i> and their <i>benefits</i>	Innovation may relate to: <ul style="list-style-type: none"> adapting to change developing better products and ways of doing things. Benefits may include: <ul style="list-style-type: none"> increased customer satisfaction increased efficiency and efficacy Increased employee engagement.
Assessment Conditions	Notes
<i>Workplace equipment and resources</i> relevant to performance evidence	Workplace equipment and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBSTR402 Implement continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB41419 Certificate IV in Work Health and Safety
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>relevant stakeholders</i> and establish improvements required	Relevant stakeholders may include: <ul style="list-style-type: none"> • colleagues • governance personnel • human resources (HR) officers • legal teams • management • regulators • work health and safety (WHS) officers.
1.5 Manage <i>reports and recommendations</i> for using systems and processes of the organisation	Reports and recommendations may relate to: <ul style="list-style-type: none"> • project plans • reviewing organisational data.
1.6 Establish <i>risk review processes</i>	Risk review processes may relate to: <ul style="list-style-type: none"> • following organisational procedures • mitigation strategies.
2.1 Use <i>workplace systems and technology</i> , and monitor team performance according to organisational policies and procedures	Workplace systems and technology may include: <ul style="list-style-type: none"> • integrated systems and technology.
Foundation Skills	Notes
Initiative and enterprise: Uses <i>systematic, analytical processes</i> in complex, non-routine situations, setting goals, gathering required information and identifying and evaluating options against agreed criteria	Systematic, analytical processes may include: <ul style="list-style-type: none"> • consulting • preparing draft documents • conducting research • seeking approvals and verification • tracking key performance indicators (KPIs).
Performance Evidence	Notes
Implement, monitor and update <i>improvement plans, processes and procedures</i> to improve performance	Improvement plans, processes and procedures may include: <ul style="list-style-type: none"> • communicating outcomes and efforts back to stakeholders.
Knowledge Evidence	Notes
<i>Change management techniques</i> that support continuous improvement and initiative	Change management techniques may include: <ul style="list-style-type: none"> • clear communication strategies • clear evidence-based objectives • goal-setting processes • regular review processes • structured approaches to ensure ownership and commitment of participants.



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BSBSTR402 Implement continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB41419 Certificate IV in Work Health and Safety
Skill sets	BSBSS00096 Innovation Practice Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Workplace documentation and resources relevant to performance evidence</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> • digital tools (e.g. spreadsheets, word processing tools) • manuals • organisational templates.



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BSBST501 Establish innovative work environments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB50820 Diploma of Project Management
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • governance personnel • human resources (HR) officers • legal teams • management • regulators • work health and safety (WHS) officers.
1.4 Determine <i>working conditions</i> that allow innovative practices according to organisational policies and procedures	<p>Working conditions may relate to:</p> <ul style="list-style-type: none"> • external environment • lighting • manual handling • movements • technology • temperature • ventilation • work stations.
2.3 Identify and select <i>resources</i> required for enhancing work environment	<p>Resources may relate to:</p> <ul style="list-style-type: none"> • coaching and mentoring • digital tools • human capital • time • training • working arrangements (e.g. collaborative work spaces).
3.4 Select ways of <i>celebrating and encouraging innovation</i>	<p>Celebrating and encouraging innovation may include:</p> <ul style="list-style-type: none"> • affirmation of contributions • recognitions.
4.2 Provide and encourage <i>formal and informal learning opportunities</i> to develop skills required for innovation	<p>Formal learning opportunities may include:</p> <ul style="list-style-type: none"> • professional development opportunities • training in new technologies and strategies. <p>Informal learning opportunities may include:</p> <ul style="list-style-type: none"> • mentoring programs • networking • professional reading • sharing learnings with teams • webinars.



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BSBSTR501 Establish innovative work environments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40320 Certificate IV in Entrepreneurship and New Business BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management BSB50620 Diploma of Marketing and Communication BSB50820 Diploma of Project Management
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Teamwork: Uses required <i>communication techniques</i> to build rapport and foster strong relationships with co-workers in a range of work contexts	Communication techniques may include: <ul style="list-style-type: none"> push, pull and interactive communication non-verbal communication (e.g. body language, eye contact) verbal communication (e.g. tone).
Knowledge Evidence	Notes
<i>Concepts and theories of innovation</i>	Concepts and theories of innovation may relate to: <ul style="list-style-type: none"> crowdsourcing idea management.
<i>Factors and tools that motivate individuals</i>	Factors and tools that motivate individuals may include: <ul style="list-style-type: none"> job security recognitions.
Assessment Conditions	Notes
Relevant <i>legislation and codes of practice</i>	Legislation may include: <ul style="list-style-type: none"> anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) applicable federal and state/territory WHS legislation Fair Work Act 2009 Privacy Act 1988. Codes of practice may include: <ul style="list-style-type: none"> industry codes of practice organisational codes of practice.
Relevant <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> operational plans organisational vision, mission and values project plans.
<i>Workplace equipment and resources</i>	Workplace equipment and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBSTR502 Facilitate continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify current <i>systems and processes that facilitate continuous improvement</i>	Systems and processes that facilitate continuous improvement may relate to: <ul style="list-style-type: none"> digital cloud-based processes regular feedback and planned reviews team meetings understanding organisational policies and procedure.
1.3 Develop <i>decision-making processes</i> to assist continuous improvement and communicate to relevant stakeholders	Decision-making processes may include: <ul style="list-style-type: none"> focus groups ideation sessions surveys project planning.
1.5 Develop <i>knowledge management systems</i> to capture team progress, insights and experiences from business activities	Knowledge management systems may include: <ul style="list-style-type: none"> customer relationship management (CRM) databases (e.g. Salesforce) human resources (HR) information systems work health and safety (WHS) management systems.
2.1 Confirm relevant systems and processes meet <i>organisation sustainability requirements</i>	Organisation sustainability requirements may relate to: <ul style="list-style-type: none"> sustainable work practices (e.g. reusing and recycling paper and plastics).

Foundation Skills	Notes
Reading: Identifies and extracts required information from a range of <i>complex texts</i>	Complex texts may include: <ul style="list-style-type: none"> briefings legislation organisational policies and procedures reports.
Reading: Locates, interprets and analyses <i>workplace documentation</i> to gather information relating to continuous improvement	Workplace documentation may include: <ul style="list-style-type: none"> manuals organisational templates.
Technology: Reflects on the ways in which <i>digital systems and tools</i> are used, or could be used, to achieve work goals	Digital systems and tools may include: <ul style="list-style-type: none"> chat functions presentation tools project management and productivity applications (e.g. Kanban boards, Trello) spreadsheets virtual meeting technology word processing tools.



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BSBSTR502 Facilitate continuous improvement**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Organisational policies and procedures</i> relevant to performance evidence	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> operational plans organisational vision, mission and values project plans.
<i>Workplace documentation and resources</i> relevant to performance evidence	Workplace documentation and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBSTR503 Develop organisational policy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Consult with <i>relevant stakeholders</i> and confirm need for new policy development	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • colleagues • governance personnel • human resources (HR) officers • legal teams • management • regulators • work health and safety (WHS) officers.
2.1 Identify <i>internal</i> and <i>external factors</i> likely to cause changes to organisation policy	<p>Internal factors may relate to:</p> <ul style="list-style-type: none"> • changes in ownership • employee issues • workforce planning and structure. <p>External factors may relate to:</p> <ul style="list-style-type: none"> • changes in customer client base and workforce operations • environmental changes (e.g. political, economic, social, technological, legal).
2.5 Identify and analyse associated <i>issues and risks</i> likely to impact policy development	<p>Issues and risks may relate to:</p> <ul style="list-style-type: none"> • finances • governance • legality • reputation • stakeholders • technology.
3.1 Identify <i>type of information required to develop policy</i>	<p>Types of information required to develop policy may relate to:</p> <ul style="list-style-type: none"> • benchmarking • consultation • current and relevant legislation • existing organisational policies and procedures • organisational templates • organisational vision, mission and values • regulations • specialist and expert advice and information.
3.3 Develop an <i>analytical framework</i> for the development of policy	<p>Analytical frameworks may require:</p> <ul style="list-style-type: none"> • approvals and verification • consultation • draft versions • research.



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BSBSTR503 Develop organisational policy**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.4 Source, analyse and apply relevant <i>information to support policy development</i> according to organisational policies and procedures	Information to support policy development may relate to: <ul style="list-style-type: none"> • benchmarking • consultation • current and relevant legislation • existing organisational policies and procedures • organisational templates • organisational vision, mission and values. • regulations • specialist and expert advice and information.
Foundation Skills	Notes
Learning: Recognises, understands and applies <i>organisational policies, procedures and protocols</i>	Organisational policies, procedures and protocols may relate to: <ul style="list-style-type: none"> • organisational and industry codes of conduct • organisational templates • style guides.
Performance Evidence	Notes
Ensure <i>style and format requirements</i> for organisational policy documentation is followed	Style and format requirements may relate to: <ul style="list-style-type: none"> • non-discriminatory language • professional appearance • review processes (e.g. peer review) • style guides.



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BSBSTR503 Develop organisational policy**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00101 Business Operations Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Risk management processes</i>	Risk management processes may include: <ul style="list-style-type: none"> developing treatment and action plans identifying, analysing and evaluating risks referring to hierarchy of controls using a risk register.
<i>Stakeholder and issues management strategies</i>	Issues management strategies may include: <ul style="list-style-type: none"> consultation processes negotiating seeking approvals stakeholder mapping.
<i>Quality assurance, monitoring and evaluation mechanisms</i>	Quality assurance, monitoring and evaluation mechanisms may include: <ul style="list-style-type: none"> collecting feedback conducting reviews.
<i>Operation of policy cycles</i>	Policy cycles may include: <ul style="list-style-type: none"> regular reviews (e.g. every 12 months).
<i>Legislative and regulatory context required to develop organisation policies</i>	Legislative and regulatory context may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) applicable federal and state/territory WHS legislation Fair Work Act 2009 Privacy Act 1988.
<i>Organisational channels to promote policy</i>	Organisational channels may include: <ul style="list-style-type: none"> emails intranet posts presentations and events team meetings toolbox talks.



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BSBSTR601 Manage innovation and continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60520 Advanced Diploma of Marketing and Communication BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and establish strategies to monitor and evaluate performance and <i>sustainability</i> of key systems and processes	<p>Sustainability may relate to:</p> <ul style="list-style-type: none"> business sustainability environmental sustainability key performance indicator (KPI) considerations.
1.3 Consult and seek advice from <i>stakeholders</i> , to identify opportunities for improvement	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers, regulators) internal stakeholders (e.g. board members, colleagues, legal teams, management, team leaders, technical experts).
2.3 Collect <i>data</i> and analyse areas for improvement in supply chains, and operational and service systems	<p>Data may include:</p> <ul style="list-style-type: none"> benchmarking data contracts financial data sales data supply chain agreements.
2.4 Conduct a <i>gap analysis</i> of supply chains, and operational and service systems and identify improvement needs and opportunities	<p>Gap analyses may include:</p> <ul style="list-style-type: none"> comparing existing objectives to current standards and legislation comparing existing practices with industry best practice.
3.5 Confirm that learnings from activities are captured and managed using relevant <i>knowledge management system</i>	<p>Knowledge management systems may include:</p> <ul style="list-style-type: none"> customer relationship management [CRM] databases (e.g. Salesforce) human resources (HR) information systems work health and safety (WHS) management systems.



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BSBSTR601 Manage innovation and continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60520 Advanced Diploma of Marketing and Communication BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Analyses, evaluates and integrates facts and ideas to construct meaning from a range of <i>text types</i>	Text types may include: <ul style="list-style-type: none"> • annual reports • industry regulations and standards • legislation.
Writing: Integrates information and ideas from a range of <i>sources</i> , utilising appropriate support materials	Sources may include: <ul style="list-style-type: none"> • government bodies • Innovation Australia • publications by peak bodies / professional networks • specialist organisations for creative ideation sources.
Self-management: Plans and implements <i>strategies</i> to review and improve own performance	Strategies may relate to: <ul style="list-style-type: none"> • creative-thinking • self-awareness • self-reflection • time management.
Problem solving: Applies <i>problem-solving processes</i> to identify risks, evaluate options and determine solutions	Problem-solving processes may include: <ul style="list-style-type: none"> • brainstorming • collaborative problem-solving • cost-benefit analysis • fishbone diagrams • nominal group techniques • root cause analysis.
Performance Evidence	Notes
Undertake <i>risk management</i> and cost-benefit analysis for options	Risk management may include: <ul style="list-style-type: none"> • developing treatment and action plans • identifying, analysing and evaluating risks • referring to hierarchy of controls • using a risk register.



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BSBSTR601 Manage innovation and continuous improvement

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60420 Advanced Diploma of Leadership and Management	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60520 Advanced Diploma of Marketing and Communication BSB60619 Advanced Diploma of Work Health and Safety BSB60720 Advanced Diploma of Program Management
Skill sets	BSBSS00097 Innovation Leadership Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Creativity and innovation theories and concepts</i>	<p>Creativity and innovation theories and concepts may relate to:</p> <ul style="list-style-type: none"> • blue sky thinking • design-thinking • disruptive innovation • lean models • systems theory • total quality management (TQM) approach.
<i>Organisational learning principles</i>	<p>Learning principles may relate to:</p> <ul style="list-style-type: none"> • collaborative coaching • communities of practice and knowledge sharing • self-directed learning.
<i>Quality management and continuous improvement theories</i>	<p>Continuous improvement theories may relate to:</p> <ul style="list-style-type: none"> • blue sky thinking • design-thinking • disruptive innovation • lean models • Six Sigma • systems theory • TQM approach.
<i>Key aspects of supply chains, and operational, product and service systems</i>	<p>Key aspects of supply chains may relate to:</p> <ul style="list-style-type: none"> • cost effectiveness • efficiency • liability • logistical processes • procurement • risks. <p>Operational, product and service systems may relate to:</p> <ul style="list-style-type: none"> • client records • customer service • purchasing and ordering • stock management • warehousing.



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BSBSTR602 Develop organisational strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult with <i>relevant stakeholders</i> on required changes to vision and mission	Relevant stakeholders may include: <ul style="list-style-type: none"> external stakeholders (e.g. customers, regulators) internal stakeholders (e.g. board members, colleagues, legal teams, management, team leaders, technical experts).
2.3 Undertake <i>capability assessment</i> of competitor organisations	Capability assessments may include analysing: <ul style="list-style-type: none"> 5Ps (price, product, place, promotion, people) annual reports external environments (e.g. SWOT and PESTEL analysis) international presence markets supply chains.
2.5 Establish <i>cooperative ventures</i> , that are supported by risk and cost benefit analyses, according to organisational vision, mission and values and provide for due diligence, where required	Cooperative ventures may refer to: <ul style="list-style-type: none"> entering a venture with another organisation for mutual benefit.
3.1 Document relevant <i>research and background</i> for inclusion in the strategic plan	Research and background may relate to: <ul style="list-style-type: none"> environmental influences (e.g. SWOT and PESTEL analysis) internal and external capabilities organisational goals and objectives organisational vision, mission and values technology.
3.4 Identify risks and develop a <i>risk management plan</i>	Risk management plans may include: <ul style="list-style-type: none"> hierarchy of controls risk registers treatment and action plans.

Foundation Skills	Notes
Reading: Identifies and analyses <i>complex organisational texts</i> to determine business requirements	Complex organisational texts may include: <ul style="list-style-type: none"> annual reports codes of conduct operational plans risk management plans strategic plans.
Initiative and enterprise: Selects and uses appropriate <i>conventions and protocols</i> when communicating with internal and external stakeholders to seek or share information	Conventions and protocols may relate to: <ul style="list-style-type: none"> delegation organisational templates referral and escalation signature sign-offs.



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BSBSTR602 Develop organisational strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Legislation, regulations and codes of practice</i> relevant to organisation's strategic plan	Legislation, regulations and codes of practice may relate to: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) applicable federal and state/territory WHS legislation Fair Work Act 2009 Privacy Act 1988.
<i>Methods for conducting capability assessment</i>	Methods for conducting capability assessments may include analysing: <ul style="list-style-type: none"> 5Ps (price, product, place, promotion, people) annual reports external environments (e.g. SWOT and PESTEL analysis) international presence markets supply chains.
Key features of <i>cooperative ventures</i>	Cooperative ventures may refer to: <ul style="list-style-type: none"> entering a business venture with another party for mutual benefit.
Methods for conducting <i>cost benefit analysis</i>	Cost benefit analysis may include: <ul style="list-style-type: none"> financial and non-financial costs and benefits.
Key features of <i>due diligence processes</i>	Due diligence processes may relate to: <ul style="list-style-type: none"> compliance cultural alignment financial statements and affairs legal actions licencing standards.
Internal and external <i>sources of information</i> relevant to the organisation's market, competitors, customer base, vision, values and capabilities	Sources of information may include: <ul style="list-style-type: none"> clients and customers government bodies publications by peak bodies / professional networks research databases (e.g. Australian Bureau of Statistics [ABS]) suppliers.
<i>Techniques for developing organisational values</i>	Techniques for developing organisational values may include: <ul style="list-style-type: none"> conducting consultations (e.g. with internal and external stakeholders).



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BSBSTR603 Develop business continuity plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify resources required and <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers, regulators) internal stakeholders (e.g. board members, colleagues, legal teams, management, team leaders, technical experts).
2.1 Develop <i>business continuity management framework</i>	<p>Business continuity management frameworks may relate to:</p> <ul style="list-style-type: none"> business operations continuous improvement succession planning workforce planning.
2.4 Conduct <i>business impact assessment</i> of implementation of business continuity framework	<p>Business impact assessments may require:</p> <ul style="list-style-type: none"> organisational knowledge resource considerations stakeholder impact analysis.
3.2 Consult and develop with relevant stakeholders <i>disaster recovery plan</i> , where required	<p>Disaster recovery plans may include:</p> <ul style="list-style-type: none"> data backup processes clear accountabilities and communication procedures established timeframes (e.g. immediate response as well as longer term responses) identified disaster categories incident response teams offsite storage.
3.7 Establish <i>communication plan</i> to report and escalate processes	<p>Communication plans may incorporate:</p> <ul style="list-style-type: none"> clear roles and accountabilities crisis management plans emergency response plans internal and external notifications (e.g. to councils, local communities, emergency services, customers) work health and safety (WHS) plans.
Foundation Skills	Notes
Self-management: Uses <i>formal decision-making processes</i> as scaffolding for thinking, seeking input, advice, feedback and specialist advice, as required	<p>Formal decision-making processes may relate to:</p> <ul style="list-style-type: none"> ethical requirements feedback and reviews organisational flow charts.



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BSBSTR603 Develop business continuity plans**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Developing <i>risk treatments strategies and plan</i>	Risk treatments strategies and plans may require: <ul style="list-style-type: none"> organisational templates.
Knowledge Evidence	Notes
Policies and procedures impacting business continuity, including <i>business continuity strategies</i>	Business continuity strategies may relate to: <ul style="list-style-type: none"> business operations continuous improvement succession planning workforce planning.
Overall operations of the organisation, including: <ul style="list-style-type: none"> existing <i>data and information systems</i> paper and digital recordkeeping systems 	Data and information systems may include: <ul style="list-style-type: none"> customer relationship management [CRM] databases (e.g. Salesforce) human resources (HR) information systems WHS management systems.



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BSBSTR801 Lead innovative thinking and practice

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and use <i>techniques and tools to generate ideas and facilitate thinking</i>	Techniques and tools to generate ideas and facilitate thinking may include: <ul style="list-style-type: none"> brainstorming cost-benefit analysis fishbone diagrams nominal group techniques root cause analysis.
1.3 Introduce and promote <i>creative thinking techniques</i>	Creative thinking techniques may relate to: <ul style="list-style-type: none"> componential theory of creativity mind mapping six thinking hats.
1.5 Research and review <i>innovation drivers and enablers</i>	Innovation drivers and enablers may relate to: <ul style="list-style-type: none"> business sustainability competitors corporate social responsibility (CSR) customer preferences productivity profit promotions.
2.1 Assess <i>personal leadership style</i> to confirm it models positive innovative thinking and practice	Personal leadership styles may include: <ul style="list-style-type: none"> agile collaborative consultative facilitative participative transformational.
2.4 Construct and implement <i>methods to promote knowledge transfer</i> with relevant stakeholders	Methods to promote knowledge transfer may relate to: <ul style="list-style-type: none"> central information databases communities of practice cross-department projects knowledge management systems team collaboration.
3.1 Identify, introduce and promote <i>innovative practices, processes, products and/or services</i> according to audience and organisational requirements	Innovative practices may relate to: <ul style="list-style-type: none"> business sustainability customer preferences environmental sustainability organisational needs.



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BSBSTR801 Lead innovative thinking and practice

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Establish ways to <i>capture, communicate and share innovative ideas and practices</i>	Ways to capture, communicate and share innovative ideas and practices may include using: <ul style="list-style-type: none"> • continuous improvement logs • knowledge management systems • software.
3.4 Identify, assess and provide relevant <i>resources for innovation processes</i>	Resources for innovation processes may include: <ul style="list-style-type: none"> • budgets and finances • feedback systems • knowledge management systems • staffing resources.
3.6 Establish <i>systems and processes that support innovation</i>	Systems and processes that support innovation may relate to: <ul style="list-style-type: none"> • continuous improvement • flexible working • knowledge management • psychological safety • rewards • workplace design.
4.2 Develop and monitor <i>processes that confirm ongoing awareness</i> of individual and collective contributions to innovative thinking and practice	Processes that confirm ongoing awareness may include: <ul style="list-style-type: none"> • providing individual and team rewards • publishing success stories.
4.3 Identify and analyse potential <i>barriers</i> and risks to <i>innovation</i> and devise strategies to respond	Barriers to innovation may relate to: <ul style="list-style-type: none"> • compliance • financial restrictions • individuals' commitment • organisation's size • risks.



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BSBSTR801 Lead innovative thinking and practice**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB80120 Graduate Diploma of Management (Learning) BSB80220 Graduate Diploma of Portfolio Management BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Current and past <i>theories and thinking about innovation</i>	Theories and thinking about innovation may include: <ul style="list-style-type: none"> • blue sky thinking • design-thinking • disruptive innovation • lean models • systems theory • total quality management (TQM) approach.
<i>Strategies</i> to foster workplace culture of innovation	Strategies may relate to: <ul style="list-style-type: none"> • collaboration • diversity and inclusion • leadership styles • role modelling • staff empowerment.



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BSBSTR802 Lead strategic planning processes for an organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80320 Graduate Diploma of Strategic Leadership	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify, gather and analyse relevant <i>organisational data</i> according to organisational policies and procedures	<p>Organisational data may include:</p> <ul style="list-style-type: none"> • benchmarking • contracts • finances • operations data • sales data • supply chain agreements.
1.3 Identify <i>stakeholders</i> and <i>resources</i> required to develop and review strategic plan	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> • board members • colleagues • legal teams • management • team leaders • technical experts. <p>Resources may include:</p> <ul style="list-style-type: none"> • financial information • word processing tools.
2.1 Establish <i>communication processes</i> that inform and support relevant team members	<p>Communication processes may relate to:</p> <ul style="list-style-type: none"> • push, pull and interactive communication • non-verbal communication (e.g. body language, eye contact) • verbal communication (e.g. tone).
2.4 Develop planning process and direction of <i>strategic plan</i>	<p>Strategic plans may include:</p> <ul style="list-style-type: none"> • long-term priorities • timeframes.
3.2 Develop <i>annual operational plan</i> to facilitate implementation of long-term strategic plan	<p>Annual operational plans may include:</p> <ul style="list-style-type: none"> • immediate priorities • timeframes.
3.3 Plan <i>human resource development and succession strategies</i> that confirm long-term business viability	<p>Human resource development and succession strategies may include:</p> <ul style="list-style-type: none"> • learning and development plans.
3.4 Initiate <i>strategies to skill own workforce</i> to implement the strategic plan	<p>Strategies to skill own workforce may relate to:</p> <ul style="list-style-type: none"> • coaching and mentoring • learning and development opportunities.
4.1 Develop <i>knowledge management systems</i> to capture team progress, insights, experiences and learnings	<p>Knowledge management systems may include:</p> <ul style="list-style-type: none"> • customer relationship management (CRM) databases (e.g. Salesforce) • human resources (HR) information systems • work health and safety (WHS) management systems.



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BSBSTR802 Lead strategic planning processes for an organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB80320 Graduate Diploma of Strategic Leadership	BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.2 Monitor <i>financial and non-financial performance indicators</i>	Financial and non-financial performance indicators may relate to: <ul style="list-style-type: none"> • innovation • employee and customer satisfaction • organisational reputation • revenue growth.
Foundation Skills	Notes
Reading: Sources, evaluates and critiques ideas and information from a range of <i>complex texts</i> to assist with strategic decisions	Complex texts may include: <ul style="list-style-type: none"> • briefings • legislation • organisational policies and procedures • reports.
Knowledge Evidence	Notes
<i>Contractual requirements</i> and implications for the business	Contractual requirements may relate to: <ul style="list-style-type: none"> • budgets • timeframes.
<i>Strategy map</i>	Strategy maps may include: <ul style="list-style-type: none"> • employee contributions • organisational goals and objectives • timeframes.
Assessment Conditions	Notes
<i>Organisational and industry information and data</i> relevant to performance evidence	Organisational and industry information and data may include: <ul style="list-style-type: none"> • benchmarking • contracts • finances • operations data • sales data • supply chain agreements.
<i>Workplace documents</i> relevant to performance evidence, including strategic planning documentation	Workplace documents may include: <ul style="list-style-type: none"> • manuals • organisational templates.



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BSBSTR803 Establish business continuity management strategies

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify organisational scope, <i>critical business operations and resources</i> , and risks and disruption scenarios	<p>Critical business operations and resources may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • feedback systems • knowledge management systems.
1.2 Develop <i>risk management strategy</i>	<p>Risk management strategies may include:</p> <ul style="list-style-type: none"> • developing treatment and action plans • identifying, analysing and evaluating risks • referring to hierarchy of controls • using risk registers.
1.3 Conduct a <i>business impact analysis</i>	<p>Business impact analysis may require:</p> <ul style="list-style-type: none"> • organisational knowledge • resource considerations • stakeholder impact analysis.
1.4 Develop <i>business continuity management framework</i> according to identified potential risks and interruption to critical business operations	<p>Business continuity management frameworks may relate to:</p> <ul style="list-style-type: none"> • business operations • continuous improvement • succession planning • workforce planning.
1.6 Consult with <i>stakeholders</i> to establish governance structures for the business continuity management framework, according to size of organisation	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> • board members • colleagues • legal teams • management • team leaders • technical experts.
2.3 Develop and seek approval of <i>tools that verify and validate</i> business continuity management framework activities, processes and plans	<p>Tools that verify and validate may relate to:</p> <ul style="list-style-type: none"> • scheduling • testing procedures.
3.2 Review and analyse the organisation's <i>communication strategy</i> and implement relevant changes	<p>Communication strategies may depend on:</p> <ul style="list-style-type: none"> • organisational goals and objectives • target audiences.
3.4 Analyse and integrate organisation's business impact assessment and identify <i>dependencies and interdependencies</i> , as required	<p>Dependencies and interdependencies may relate to:</p> <ul style="list-style-type: none"> • employees • suppliers.
Foundation Skills	Notes
Problem solving: Uses <i>formal decision-making processes</i> as scaffolding for thinking, seeking input, advice, feedback and specialist advice, as required	<p>Formal decision-making processes may relate to:</p> <ul style="list-style-type: none"> • ethical requirements • feedback and reviews • organisational flow charts.



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BSBSTR803 Establish business continuity management strategies**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Risk management strategy</i>	Risk management strategies may include: <ul style="list-style-type: none"> • developing treatment and action plans • identifying, analysing and evaluating risks • referring to hierarchy of controls • using risk registers.
Current organisation functions, including existing <i>data and information systems</i>	Data and information systems may relate to: <ul style="list-style-type: none"> • benchmarking • contracts • finances • operations • sales data • supply chain agreements.
Relationship of the <i>business continuity management framework</i> to other business processes	Business continuity management frameworks may relate to: <ul style="list-style-type: none"> • business operations • continuous improvement • succession planning • workforce planning.
Assessment Conditions	Notes
Organisational and industry <i>information and data</i>	Information and data may relate to: <ul style="list-style-type: none"> • benchmarking • contracts • finances • operations • sales data • supply chain agreements.
<i>Workplace equipment and materials</i>	Workplace equipment and materials may include: <ul style="list-style-type: none"> • digital tools (e.g. spreadsheets, word processing tools) • manuals • organisational templates.



Sustainability

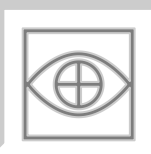
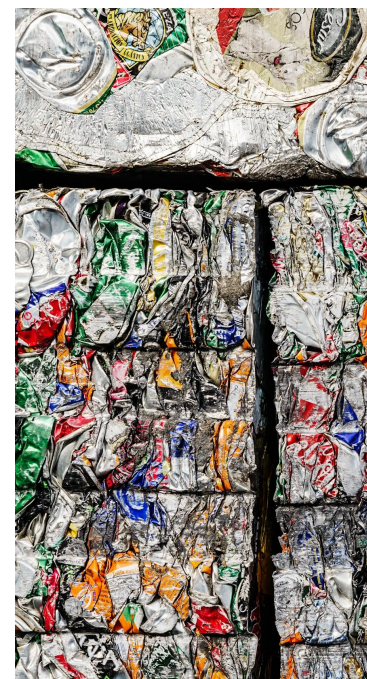
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Sustainability Unit Sector Overview

The Sustainability (SUS) unit sector incorporates units of competency aimed at supporting individuals in a range of industries and job roles to develop skills to support the operational sustainability of an organisation.

An individual with the skills and knowledge to apply sustainability practices in a workplace environment manages financial, social and environmental risks, obligations and opportunities. Relevant job roles may include sustainability manager, sustainability coordinator, health and safety officer, project team leader.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.

Sustainability Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Sustainability' unit stream, please refer to the interpretation guidance provided on pages 550 - 561. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBSUS211 Participate in sustainable work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business	BSB10120 Certificate I in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>sustainable work practices</i> in own work role	Sustainable work practices may include: <ul style="list-style-type: none"> • water-saving practices • reusing and recycling paper and plastics • using light-saving devices (e.g. sensor lights).
1.2 Measure current usage of <i>resources</i> in own work role	Resources may include: <ul style="list-style-type: none"> • electricity • paper • water.
1.3 Record and file resource usage <i>documents</i>	Documents may include: <ul style="list-style-type: none"> • checklists • data reports • observation sheets • printing reports • receipts.
2.1 Identify and comply with workplace <i>sustainability procedures</i>	Sustainability procedures may relate to: <ul style="list-style-type: none"> • automated sleep times for printers • organisational sustainability policies • signage (e.g. placing signs on doors to turn lights off when leaving a room).
2.2 Identify workplace <i>environmental hazards</i> according to <i>environmental regulations and standards</i>	Environmental hazards may include: <ul style="list-style-type: none"> • asbestos. Environmental regulations and standards may relate to: <ul style="list-style-type: none"> • disposal legislation (e.g. chemicals, rubber, asbestos removal) • infection control.
2.3 Report any <i>breaches</i> and potential breaches to <i>organisational personnel</i>	Breaches may include: <ul style="list-style-type: none"> • not disposing of chemicals or other hazards correctly. Organisational personnel may include: <ul style="list-style-type: none"> • business owners • first aid officers • human resources (HR) officers • supervisors • sustainability officers • work health and safety (WHS) officers.
3.1 Identify <i>areas of improvement</i> to work practices in own work area	Areas of improvement may relate to: <ul style="list-style-type: none"> • defining clear work expectations with team members • proactive sustainability practices and processes.



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BSBSUS211 Participate in sustainable work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business	BSB10120 Certificate I in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Teamwork: Selects and uses appropriate <i>conventions and protocols</i> when communicating with co-workers in a range of work contexts	Conventions and protocols may relate to: <ul style="list-style-type: none"> communication organisational charts organisational guidelines.
Self Management: Understands and adheres to <i>legal and regulatory responsibilities</i> related to own work	Legal and regulatory responsibilities may relate to: <ul style="list-style-type: none"> local, state and territory WHS legislation reporting lines.
Technology: Uses main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> internet online reporting systems spreadsheets word processing tools.
Performance Evidence	Notes
Identify <i>benefits of sustainable work practices</i> and areas of improvement for sustainable practices in the workplace	Benefits of sustainable work practices may include: <ul style="list-style-type: none"> addressing ethical obligations and responsibilities compliance with legislation and regulations positive environmental impacts reduced costs reputation benefits (e.g. attracting employers, clients and customers).
Identify and apply <i>sustainability legislation and organisational sustainability policies and procedures</i>	Sustainability legislation and organisational sustainability policies and procedures may relate to: <ul style="list-style-type: none"> local, state and territory WHS legislation organisational and industry codes of practice.
Participate in and support discussions for improved <i>resource efficiency processes</i>	Resource efficiency processes may include: <ul style="list-style-type: none"> awareness campaigns online sustainability training modules organisational sustainability champions.
Knowledge Evidence	Notes
<i>Sustainability regulations and codes of practice</i> applicable to own role	Sustainability regulations and codes of practice may relate to: <ul style="list-style-type: none"> state, territory and Commonwealth WHS legislation organisational and industry codes of practice.



BSBSUS411 Implement and monitor environmentally sustainable work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40920 Certificate IV in Project Management Practice BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and assess organisational compliance against <i>environmental legislation, regulations and standards</i>	Environmental legislation, regulations and standards may relate to: <ul style="list-style-type: none"> • Environment Protection and Biodiversity Conservation Act 1999.
1.2 Collect <i>data on environmental efficiency</i> in organisational systems and processes	Data on environmental efficiency may include: <ul style="list-style-type: none"> • air quality • chemical and pesticide usage • electricity usage • paper usage • waste • water usage.
1.3 Analyse <i>data</i> on environmental efficiency and <i>current purchasing strategies</i> and identify areas for improvement	Data on current purchasing strategies may relate to: <ul style="list-style-type: none"> • green purchasing strategies • recycled or reused resources in place of repurchasing supply chains.
1.4 Consult <i>stakeholders</i> and external data sources on sustainability best practice	Stakeholders may include: <ul style="list-style-type: none"> • external stakeholders (e.g. consultants, customers, reporting bodies, general public, government bodies, shareholders) • internal stakeholders (e.g. colleagues, management).
1.5 Develop efficiency targets and <i>methods to monitor outcomes</i>	Methods to monitor outcomes may include: <ul style="list-style-type: none"> • comparison to previous period statistics • developing checklists • surveying employees and customers • tracking water and electricity consumption and bills.
2.1 Identify and source <i>tools to set efficiency targets</i>	Tools to set efficiency targets may include: <ul style="list-style-type: none"> • checklists • databases • spreadsheets.
2.4 Seek and act on <i>feedback</i> from stakeholders on implementation	Feedback may be sourced from: <ul style="list-style-type: none"> • community forums and focus groups • questionnaires and surveys.



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BSBSUS411 Implement and monitor environmentally sustainable work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40920 Certificate IV in Project Management Practice BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Document and communicate outcomes to <i>key personnel and stakeholders</i>	Key personnel and stakeholders may include: <ul style="list-style-type: none"> business owners general public government bodies management workforce.
Foundation Skills	Notes
Numeracy: Analyses numerical information to measure usage and calculates metric measurements, quantities and ratios and financial data using appropriate <i>tools</i>	Tools may include: <ul style="list-style-type: none"> checklists databases spreadsheets.
Reading: Identifies and analyses <i>texts</i> to determine legislative and regulatory requirements relevant to work area	Texts may include: <ul style="list-style-type: none"> annual reports organisational and non-governmental organisation (NGOs) fact sheets organisational policies and procedures sustainability reports.
Initiative and enterprise: Identifies and follows <i>legislative requirements and organisational policies and procedures</i> associated with own role	Legislative requirements may include: <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) legislation. Organisational policies and procedures may relate to: <ul style="list-style-type: none"> chemical use and storage disposal of different waste types information technology procurement resource efficiency.
Technology: Uses the main features and functions of <i>digital tools</i> to complete work tasks and access information	Digital tools may include: <ul style="list-style-type: none"> internet online reporting systems spreadsheets word processing tools.



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BSBSUS411 Implement and monitor environmentally sustainable work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30719 Certificate III in Work Health and Safety BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40920 Certificate IV in Project Management Practice BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Identify current <i>procedures, practices and compliance requirements</i> in relation to environmental and resource sustainability in the workplace	Procedures, practices and compliance requirements may relate to: <ul style="list-style-type: none"> developing checklists ensuring all devices are turned off monitoring and tracking water and electricity consumption and bills surveying employees and customers.
Apply <i>continuous improvement approaches</i> to enhance organisation's sustainability performance	Continuous improvement approaches may relate to workforce: <ul style="list-style-type: none"> acknowledgement and recognition positive reinforcement.
Apply <i>change management techniques</i> to support sustainability performance	Change management techniques may include: <ul style="list-style-type: none"> creating organisational flowcharts culture mapping.



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BSBSUS412 Develop and implement workplace sustainability plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Research <i>environmental legislation, regulations and policies</i> for application in sustainability plan	<p>Environmental legislation, regulations and policies may relate to:</p> <ul style="list-style-type: none"> • Environment Protection and Biodiversity Conservation Act 1999 • state, territory and Commonwealth work health and safety (WHS) legislation.
1.3 Consult <i>relevant stakeholders</i> for information on identified workplace sustainability issues	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • board of directors • colleagues • senior management.
1.4 Identify and document <i>indicators for measuring sustainability</i> plan outcomes	<p>Indicators for measuring sustainability may include:</p> <ul style="list-style-type: none"> • economic • environmental • political • social.
2.1 Identify <i>resources</i> required to implement sustainability plan	<p>Resources may include:</p> <ul style="list-style-type: none"> • digital tools (e.g. tracking spreadsheets) • finances • human capital..
Foundation Skills	Notes
Numeracy: Analyses numerical information to measure usage and calculates metric measurements, quantities and ratios and financial data using appropriate <i>tools</i>	<p>Tools may include:</p> <ul style="list-style-type: none"> • checklists • databases • spreadsheets.
Reading: Identifies and analyses <i>complex texts</i> to determine legislative, regulatory and business requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • briefings • legislation • reports • organisational policies and procedures.
Initiative and enterprise: Uses the main features and functions of <i>digital tools</i> to complete work tasks and access information	<p>Digital tools may include:</p> <ul style="list-style-type: none"> • internet • online reporting systems • spreadsheets • word processing tools.



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BSBSUS412 Develop and implement workplace sustainability plans

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40520 Certificate IV in Leadership and Management BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Applicable <i>external assistance</i> and programs, including software programs, to assist in implementation of sustainability plans	External assistance may be sourced from: <ul style="list-style-type: none"> local, state and federal government bodies peak industry bodies.



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BSBSUS413 Evaluate and report on workplace sustainability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>environmental legislation</i> , regulations and policies for evaluation and reporting requirements	<p>Environmental legislation, regulations and policies may include:</p> <ul style="list-style-type: none"> • Environment Protection and Biodiversity Conservation Act 1999 • state, territory and Commonwealth work health and safety (WHS) legislation.
1.2 Assess <i>advantages and opportunities for companies that report sustainability practices</i>	<p>Advantages and opportunities for companies that report sustainability practices may include:</p> <ul style="list-style-type: none"> • compliance with legislation and regulations • positive environmental impacts • reduced costs • reputation benefits (e.g. attracting employers, clients and customers).
2.1 Engage <i>relevant stakeholders</i> for information regarding workplace areas to be assessed	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • board of directors • colleagues • senior management.
3.1 Identify <i>compliance issues</i> and <i>areas for improvement</i> in sustainability practices	<p>Compliance issues may relate to:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) legislation • organisational and industry codes of conduct. <p>Areas of improvement may relate to:</p> <ul style="list-style-type: none"> • defining clear work expectations with team members • proactive sustainability practices and processes.
Foundation Skills	Notes
Reading: Interprets and analyses text from a range of <i>sources</i> to identify key information	<p>Sources may include:</p> <ul style="list-style-type: none"> • intranet • organisational procedures • work instructions.
Performance Evidence	Notes
Develop objectives and corresponding <i>indicators to assess workplace sustainability</i>	<p>Indicators to assess workplace sustainability may include:</p> <ul style="list-style-type: none"> • economic • environmental • political • social.



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BSBSUS511 Develop workplace policies and procedures for sustainability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB40120 Certificate IV in Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Gather information for development of <i>sustainability policies</i>	Sustainability policies may relate to: <ul style="list-style-type: none"> state, territory and Commonwealth government resource efficiency policies industry best practice legislation requirements organisational report findings.
1.4 Develop and document sustainability policies according to <i>organisational processes</i>	Organisational processes may include: <ul style="list-style-type: none"> organisational templates style guides.
1.5 Incorporate implementation and <i>continuous improvement processes</i> into sustainability policies	Continuous improvement processes may relate to: <ul style="list-style-type: none"> monitoring and tracking changes plan-do-check-act (PDCA) model.
2.1 Present workplace sustainability policies and implementation processes to <i>key stakeholders</i>	Key stakeholders may include: <ul style="list-style-type: none"> board of directors employees senior management.
2.2 Identify and source <i>resources</i> required to implement sustainability policies	Resources may include: <ul style="list-style-type: none"> digital tools (e.g. word processing tools) required finances staffing resources.
2.4 Track continuous improvements in sustainability approaches using <i>recording systems</i>	Recording systems may include: <ul style="list-style-type: none"> continuous improvement registers spreadsheets.
3.1 Document outcomes and provide feedback to <i>key personnel and stakeholders</i>	Key personnel and stakeholders may include those listed under 'key stakeholders' above.



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BSBSUS511 Develop workplace policies and procedures for sustainability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB40120 Certificate IV in Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex textual information</i> to determine legislative and regulatory requirements, trends and outcomes	<p>Complex textual information may be sourced from:</p> <ul style="list-style-type: none"> • academic work journals • environmental agency reports • government, industry and organisational reports • Intergovernmental Panel on Climate Change (IPCC) reports.
Initiative and enterprise: Develops, monitors and modifies <i>organisational policies and procedures</i> according to legislative requirements and organisation goals	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • state, territory and Commonwealth work health and safety (WHS) legislation • Privacy Act 1988 • style guides.
Knowledge Evidence	Notes
Internal and external <i>sources of information</i> and their use in planning and developing organisational sustainability policies and procedures	<p>Sources of information may include:</p> <ul style="list-style-type: none"> • intranet • job descriptions • organisational policies and procedures • style guides • work instructions.
Typical <i>barriers</i> to implementing policies and procedures in an organisation and possible strategies to address them	<p>Barriers may relate to:</p> <ul style="list-style-type: none"> • finances and budget • organisational culture • organisational vision, mission and values.



BSBSUS601 Lead corporate social responsibility

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business	BSB50120 Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management"
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Qualify and quantify the <i>drivers for corporate social responsibility</i>	<p>Drivers for corporate social responsibility may include:</p> <ul style="list-style-type: none"> • compliance • costs • efficiency • public perception.
1.2 Identify current <i>benefits of, and barriers to, corporate social responsibility</i> for organisation	<p>Benefits of corporate social responsibility may include:</p> <ul style="list-style-type: none"> • compliance with legislation and regulations • positive environmental impacts • reduced costs • reputation benefits (e.g. attracting employers, clients and customers). <p>Barriers to corporate social responsibility may relate to:</p> <ul style="list-style-type: none"> • budgets and finances • organisational culture • organisational vision, mission and values.
1.3 Analyse <i>legislation, regulation, standards and organisational policy</i> affecting corporate social responsibility	<p>Legislation, regulation, standards and organisational policy may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • Fair Work Act 2009 • state, territory and Commonwealth work health and safety (WHS) legislation • organisational and industry codes of conduct • Privacy Act 1988.
1.4 Identify future opportunities for <i>socially responsible practices</i>	<p>Socially responsible practices may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination • carbon neutrality • diversity and inclusion • equal employment opportunity (EEO) • organisational policies that benefit the environment • volunteering.
2.5 Prepare and distribute <i>documentation</i> regarding corporate social responsibility strategy	<p>Documentation may include:</p> <ul style="list-style-type: none"> • corporate social responsibility plans.
3.1 Conduct review of corporate social responsibility integration with <i>relevant people</i>	<p>Relevant people may include:</p> <ul style="list-style-type: none"> • auditors • board of directors • senior management.



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BSBSUS601 Lead corporate social responsibility

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business	BSB50120 Diploma of Business BSB60420 Advanced Diploma of Leadership and Management BSB60720 Advanced Diploma of Program Management"
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Teamwork: Uses <i>inclusive and collaborative techniques</i> to cooperate and consult with others to identify options to support policy objectives	Inclusive and collaborative techniques may include: <ul style="list-style-type: none"> • focus groups • surveys • team meetings • toolbox talks • training • webinars.
Performance Evidence	Notes
Consult and communicate with <i>relevant stakeholders</i> to develop CSR objectives and policy that align to organisational goals	Relevant stakeholders may include those listed under 'relevant people' above.



Technology Use

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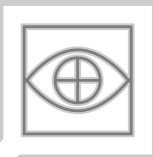
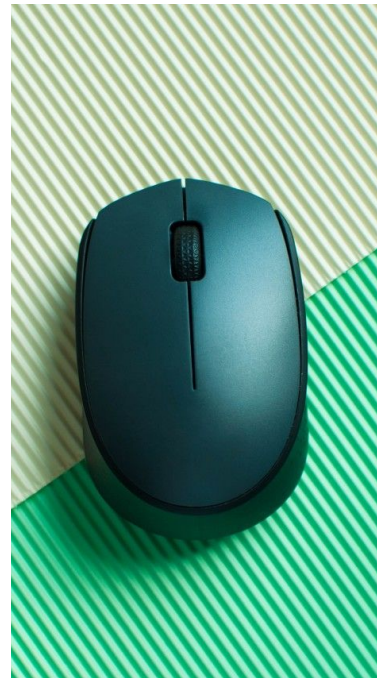
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Technology Use Unit Sector Overview

The Technology Use (TEC) unit sector incorporates units of competency aimed at supporting individuals in a range of industries and job roles to develop skills and knowledge in technology, software and digital strategy.

The ability to effectively use new and emerging technologies is increasingly important for individuals in the workforce. Technological developments present opportunities for organisations to operate more effectively and efficiently, including by enabling greater collaboration.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Protocols	Protocols outline explicit and specific plans that specify procedures to be followed in defined situations.
Style guides	Style guides refer to standards to ensure consistency in style and format for the design of organisational material, such as documents, emails and websites.
Word processing	Word processing refers to the creation and manipulation of text on a computer or word processor. Software and tools used for this may be a part of an organisation's internal system, as well as online collaborative word processing tools.

Technology Use Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Technology Use' unit stream, please refer to the interpretation guidance provided on pages 564 - 591. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBTEC101 Operate digital devices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00124 Workplace IT Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Prepare workspace, furniture and equipment to suit user <i>ergonomic requirements</i> , where required	<p>Ergonomic requirements may relate to:</p> <ul style="list-style-type: none"> work-station set-up. <p>Ergonomic requirements may vary between workplaces.</p>
1.2 Activate <i>digital device</i> , and access or log on according to <i>organisation policies and procedures</i>	<p>Digital devices may include:</p> <ul style="list-style-type: none"> computers and laptops smart watches tablets telephones. <p>Organisation policies and procedures may relate to:</p> <ul style="list-style-type: none"> manual handling privacy and confidentiality security social media work health and safety (WHS).
1.3 Identify basic <i>functions and features</i> of digital devices	<p>Functions and features may include:</p> <ul style="list-style-type: none"> secure passwords. <p>Functions and features may depend on the digital device.</p>
2.5 Identify and access <i>storage devices</i> relevant to the digital device	<p>Storage devices may include:</p> <ul style="list-style-type: none"> cloud storage hard drives.
Foundation Skills	Notes
Reading: Recognises textual information within internal procedures and <i>technical documents</i> to determine and complete work requirements	<p>Technical documents may include:</p> <ul style="list-style-type: none"> application websites help functions Safe Work Method Statements (SWMS) style guides.
Writing: Inputs information using familiar <i>text types</i> and records numerical and textual information for file naming conventions	<p>Text types may relate to:</p> <ul style="list-style-type: none"> email templates naming conventions organisational templates version control.



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BSBTEC101 Operate digital devices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00124 Workplace IT Foundations Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key components of the digital system, including what each component does</i>	Key components of the digital system may include: <ul style="list-style-type: none"> • earphones • external storage • hard drive • keyboard • mouse • network • smartpen • touch screen.
<i>Ergonomic issues that impact the use of digital devices</i>	Ergonomic issues may relate to: <ul style="list-style-type: none"> • eye strain • non-traditional environments • physical limitations of individuals • position of head and neck • size of device.
<i>Key functions of the operating system</i>	Key functions of the operating system may include: <ul style="list-style-type: none"> • secure passwords.



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BSBTEC201 Use business software applications**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Select relevant <i>technology and software applications</i> to achieve requirements of the task	Technology and software applications may include: <ul style="list-style-type: none"> • databases • digital communication tools (e.g. email) • graphic design applications • presentation tools • spreadsheets • word processing tools.
1.3 Adjust workspace, furniture and equipment to suit own <i>ergonomic requirements</i>	Ergonomic requirements may relate to: <ul style="list-style-type: none"> • breaks • lighting • manual handling • movement • technology • temperature • time management • work and task design • workstation • ventilation.
2.4 Format information or data using appropriate <i>application functions</i> according to organisational and task requirements	Application functions may relate to: <ul style="list-style-type: none"> • editing • formatting.

Foundation Skills	Notes
Reading: Recognises and interprets information from familiar <i>sources</i> to determine job role and task requirements	Sources may include: <ul style="list-style-type: none"> • intranet • job descriptions • organisational policies and procedures • style guides • supervisors.
Writing: Completes required <i>documentation</i> using organisational <i>formats</i>	Documentation may include: <ul style="list-style-type: none"> • forms • letters • minutes • notes • simple reports • spreadsheets. Formats may relate to: <ul style="list-style-type: none"> • style guides • templates.



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BSBTEC201 Use business software applications

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30320 Certificate III in Legal Services BSB30420 Certificate III in Library and Information Services	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Select and use technology safely and according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> • archiving and disposal • authorisation • codes of conduct for safe use of organisational resources • ergonomic and safety requirements • maintenance and reporting requirements • privacy and confidentiality • storage, security and access.
Identify and address <i>faults</i> according to requirements	Faults may include: <ul style="list-style-type: none"> • equipment failure • failure to save and retain resources • loss of data.
Assessment Conditions	Notes
<i>Workplace equipment and resources</i>	Workplace equipment and resources may include: <ul style="list-style-type: none"> • computers and laptops • internet access • paper and pens • software.
<i>Electronic files, information and data</i>	Electronic files, information and data may include: <ul style="list-style-type: none"> • forms • minutes • notes • simple reports • spreadsheets.



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BSBTEC202 Use digital technologies to communicate in a work environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business
Skill sets	BSBSS00126 Contact Centre Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify available <i>digital communication applications</i> by accessing relevant <i>sources of information</i> and clarify with <i>relevant personnel</i> , where required	<p>Digital communication applications may include:</p> <ul style="list-style-type: none"> • collaborative tools • email services • instant messaging applications • virtual meeting technology. <p>Sources of information may include organisational:</p> <ul style="list-style-type: none"> • policies and procedures • specific messaging platforms • style guides • templates. <p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • colleagues • information technology (IT) department • supervisors.
2.2 Create outgoing digital communication, check for accuracy and ensure that any required attachments are included according to <i>application requirements</i> and <i>organisational policies and procedures</i>	<p>Application requirements may relate to:</p> <ul style="list-style-type: none"> • compressed files • encrypted attachments • size of attachments. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • customer service • internet usage • organisational and industry codes of conduct • social media.
2.4 Access and identify most appropriate <i>action</i> in response to incoming digital communications, according to <i>organisational policies and procedures</i>	<p>Actions may relate to:</p> <ul style="list-style-type: none"> • filing and storage • forwarding to appropriate personnel • procedures for reporting abusive emails • procedures for reporting spam emails • response timelines • retention periods. <p>Organisational policies and procedures may relate to those listed under 'organisational policies and procedures' above.</p>
3.5 Create <i>methods for communicating</i> electronically with targeted groups of stakeholders as relevant to organisation	<p>Methods for communicating may include:</p> <ul style="list-style-type: none"> • chat groups • email chains • newsletters.



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BSBTEC202 Use digital technologies to communicate in a work environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB20120 Certificate II in Workplace Skills BSB30120 Certificate III in Business
Skill sets	BSBSS00126 Contact Centre Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Recognises textual information within different <i>materials</i> and interprets information to determine requirements, as well as confirming accuracy of content	<p>Materials may include:</p> <ul style="list-style-type: none"> digital tool help functions and information.
Self management: Recognises and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	<p>Explicit and implicit protocols may relate to:</p> <ul style="list-style-type: none"> customer service policies internet usage policies organisational and industry codes of conduct social media policies workflows.
Problem solving: Recognises and responds to <i>routine problems</i> in context of own work	<p>Routine problems may include:</p> <ul style="list-style-type: none"> human error loss of data technology issues (e.g. network problems).
Performance Evidence	Notes
Follow <i>organisational and technology provider requirements</i> when communicating electronically across multiple digital applications, including in relation to security of communications	<p>Organisational and technology provider requirements may be sourced from:</p> <ul style="list-style-type: none"> help functions organisational policies and procedures technology user manuals.
Follow <i>organisational policy and procedures</i> when managing all aspects of digital communication, including by storing, filing, archiving, and deleting inbound communications	<p>Organisational policy and procedures may relate to:</p> <ul style="list-style-type: none"> customer service internet usage organisational and industry codes of conduct storage, security and access.
Knowledge Evidence	Notes
<i>Commercial sensitivities</i> in relation to knowledge management	<p>Commercial sensitivities may relate to:</p> <ul style="list-style-type: none"> copyright intellectual property (IP) privacy and confidentiality.
Assessment Conditions	Notes
Relevant <i>workplace documentation and resources</i>	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> forms minutes notes organisational policies and procedures simple reports spreadsheets.



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BSBTEC203 Research using the internet

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify potential <i>sources for research information</i> according to <i>organisational policies and procedures</i>	<p>Sources for research information may include:</p> <ul style="list-style-type: none"> • databases • organisational and industry codes of conduct • verifiable and secure websites. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality • social media • storage, security and access • work health and safety (WHS).
2.1 Power up <i>digital device</i> and access internet using selected application	<p>Digital devices may include:</p> <ul style="list-style-type: none"> • computers and laptops • tablets • telephones.
Foundation Skills	Notes
Self-management: Recognises and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	<p>Explicit and implicit protocols may relate to:</p> <ul style="list-style-type: none"> • internet usage policies • organisational and industry codes of conduct • social media policies • workflows.
Technology: Understands <i>functions and features</i> of specific digital applications and uses these to perform work tasks	<p>Functions and features may relate to:</p> <ul style="list-style-type: none"> • editing • formatting • internet searching • secure passwords. <p>Functions and features may depend on the digital application.</p>



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BSBTEC203 Research using the internet**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key elements of basic research methods</i>	Key elements of basic research methods may relate to: <ul style="list-style-type: none"> • referencing and recording • search engines • search terms • smart and boolean searches • URL construction • verifiable sources.
<i>Relevant organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> • copyright • intellectual property (IP) • plagiarism guidelines.
<i>Key principles of documenting research</i>	Key principles of documenting research may include: <ul style="list-style-type: none"> • aggregate scoring • bookmarking • referencing • research credibility.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> • forms • minutes • notes • organisational policies and procedures • simple reports • spreadsheets.



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BSBTEC301 Design and produce business documents**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Select and use <i>technology and software applications</i> to produce required <i>business documents</i>	<p>Technology and software applications may include:</p> <ul style="list-style-type: none"> • digital communication tools (e.g. email) • graphic design applications • online surveys • presentation tools • spreadsheets • word processing tools. <p>Business documentation may include:</p> <ul style="list-style-type: none"> • forms • minutes • notes • simple reports • spreadsheets.
1.2 Select <i>layout and style of publication</i> according to information and organisational requirements	<p>Layout and style of publication may relate to:</p> <ul style="list-style-type: none"> • accessibility and equity • organisational style guides and templates.
1.3 Use <i>basic design principles</i> and ensure document design is consistent with organisational requirements	<p>Basic design principles may relate to:</p> <ul style="list-style-type: none"> • editing • formatting • use of organisational templates.
2.3 Use a range of <i>functions</i> to ensure consistency of design and layout	<p>Functions may relate to:</p> <ul style="list-style-type: none"> • editing • formatting • headers and footers • logos.
3.1 Complete document production according to <i>organisational policies, procedures and requirements</i>	<p>Organisational policies, procedures and requirements may relate to:</p> <ul style="list-style-type: none"> • accessibility and equity • style guides • templates • version control.



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BSBTEC301 Design and produce business documents**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Recognises and interprets textual information from a range of <i>sources</i> to determine and adhere to requirements	Sources may include: <ul style="list-style-type: none"> • intranet • job descriptions • organisational policies and procedures • style guides.
Self Management: Recognises and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	Explicit and implicit protocols may relate to: <ul style="list-style-type: none"> • internet usage policies • organisational and industry codes of conduct • social media policies • workflows.
Performance Evidence	Notes
Use required <i>data storage options</i>	Data storage options may include: <ul style="list-style-type: none"> • cloud-based storage • corporate electronic filing systems (e.g. sharepoints) • network and shared storage • portable storage • regular back ups.
Knowledge Evidence	Notes
Key <i>functions and features</i> of contemporary computer applications	Functions and features may relate to: <ul style="list-style-type: none"> • editing • formatting • headers and footers • help menus and applications. <p>Functions and features may depend on the computer application.</p>
Assessment Conditions	Notes
<i>Workplace equipment and resources</i>	Workplace equipment and resources may include: <ul style="list-style-type: none"> • computers and laptops • internet access • paper and pens • software.



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BSBTEC302 Design and produce spreadsheets**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Select most appropriate application to produce spreadsheet, according to available resources and <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality • storage, security and access • work health and safety (WHS).
2.3 Use available <i>application functions</i> and confirm consistency of design and layout, adhering to <i>organisational and task requirements</i>	<p>Application functions may relate to:</p> <ul style="list-style-type: none"> • editing • formatting • headers and footers • help menus and applications. <p>Organisational and task requirements may be sourced from:</p> <ul style="list-style-type: none"> • organisational templates • style guides.
5.2 Deliver document to <i>required stakeholders</i> according to <i>organisational requirements, policies and procedures</i>	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> • external stakeholders (e.g. clients, customers) • internal stakeholders (e.g. managers, supervisors). <p>Organisational requirements, policies and procedures may relate to:</p> <ul style="list-style-type: none"> • accessibility and equity • organisational style guides and templates • version control.
Foundation Skills	Notes
Writing: Inputs <i>numerical and key reporting information</i> when creating and finalising spreadsheet	<p>Numerical and key reporting information may include:</p> <ul style="list-style-type: none"> • charts, tables and graphs • data and statistics • formulas.
Performance Evidence	Notes
Design spreadsheets that address a range of <i>data</i> and organisational requirements	<p>Data may relate to:</p> <ul style="list-style-type: none"> • formulas • labels • text.



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BSBTEC302 Design and produce spreadsheets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key features of spreadsheet applications</i> , both cloud-based and non-cloud based	Key features of spreadsheet applications may relate to: <ul style="list-style-type: none"> • calculations • collaboration.
<i>Key features of organisational guidelines</i> on spreadsheet design and use	Key features of organisational guidelines may relate to: <ul style="list-style-type: none"> • accessibility and equity • style guides and templates.
Assessment Conditions	Notes
<i>Relevant legislation and codes of practice</i>	Legislation may include: <ul style="list-style-type: none"> • Fair Work Act 2009 • local, state and territory WHS legislation. • Privacy Act 1988. Codes of practice may include: <ul style="list-style-type: none"> • organisational and industry codes of practice.
<i>Workplace documentation and resources</i> , including style guide	Workplace documentation and resources may include: <ul style="list-style-type: none"> • forms • minutes • notes • organisational policies and procedures • simple reports • spreadsheets.



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BSBTEC303 Create electronic presentations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Organise personal work environment according to <i>ergonomic requirements</i>	<p>Ergonomic requirements may relate to:</p> <ul style="list-style-type: none"> • breaks • lighting • manual handling • movement • technology • temperature • time management • work and task design • work stations • ventilation.
1.3 Identify <i>organisational and task requirements</i>	<p>Organisational and task requirements may include using:</p> <ul style="list-style-type: none"> • style guides • templates.
1.4 Select required application to produce presentation, according to available resources and <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality • social media • storage, security and access • work health and safety (WHS).
2.2 Use <i>application functions</i> for consistency of design and layout	<p>Application functions may relate to:</p> <ul style="list-style-type: none"> • editing • formatting • help menus and applications. <p>Functions may depend on the application.</p>
2.3 Balance <i>presentation features</i> for visual impact and emphasis	<p>Presentation features may include:</p> <ul style="list-style-type: none"> • charts, tables and graphs • collaborative activities.
3.2 Prepare <i>presentation materials</i> for delivery according to <i>presenter or audience requirements</i>	<p>Presentation materials may include:</p> <ul style="list-style-type: none"> • handouts • speaker notes. <p>Presenter or audience requirements may relate to:</p> <ul style="list-style-type: none"> • brand colours and styles • templates. <p>Presenter or audience requirements may be specific to the type of presentation.</p>
3.3 Name and store presentation appropriately, according to <i>organisational requirements</i> and exit application	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • storage, security and access • style guides and templates • version control.



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BSBTEC303 Create electronic presentations

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00112 Workplace Technology Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Writing: Communicates relationships between ideas and information in a <i>style</i> appropriate to audience and purpose in accordance with organisational and task requirements	Styles may relate to: <ul style="list-style-type: none"> organisational templates style guides.
Performance Evidence	Notes
Produce presentation in appropriate <i>format</i>	Formats may be sourced from: <ul style="list-style-type: none"> organisational templates style guides.
Assessment Conditions	Notes
<i>Workplace equipment and materials</i>	Workplace equipment and materials may include: <ul style="list-style-type: none"> computers and laptops internet access paper and pens software.
Relevant <i>workplace documentation and resources</i> including style guide	Workplace documentation and resources may include: <ul style="list-style-type: none"> forms minutes notes organisational policies and procedures simple reports spreadsheets.



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BSBTEC401 Design and produce complex text documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>ergonomics requirements</i> and organise personal work environment	<p>Ergonomic requirements may relate to:</p> <ul style="list-style-type: none"> • breaks • lighting • manual handling • movement • technology • temperature • time management • work and task design • work stations • ventilation.
1.2 Use <i>safe work practices</i> to ensure ergonomic, energy and resource conservation requirements are met	<p>Safe work practices may relate to:</p> <ul style="list-style-type: none"> • work health and safety (WHS) requirements (e.g. taking regular breaks).
1.4 Identify <i>organisational requirements</i> for text based business documents to ensure consistency of style and image	<p>Organisational requirements may be sourced from:</p> <ul style="list-style-type: none"> • policies and procedures • style guides • templates.
1.5 Evaluate <i>complex technical functions of software</i> for usefulness in fulfilling requirements of the task	<p>Complex technical functions may relate to:</p> <ul style="list-style-type: none"> • complex data • indexes (e.g. table of contents) • macros. <p>Software may include:</p> <ul style="list-style-type: none"> • graphic design applications • spreadsheets • word processing tools.
4.3 Name and store documents in accordance with <i>organisational requirements</i> and exit application	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • storage, security and access • style guides and templates • version control.
4.4 Prepare document according to <i>organisational requirements, policies and procedures</i>	<p>Organisational requirements, policies and procedures may include:</p> <ul style="list-style-type: none"> • checklists • style guides • templates.



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BSBTEC401 Design and produce complex text documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Recognises and interprets textual information from a range of <i>resources</i> to determine and confirm requirements and to assist with <i>document issues</i>	<p>Resources may include:</p> <ul style="list-style-type: none"> • forms • minutes • notes • organisational policies and procedures • reports • spreadsheets. <p>Document issues may include:</p> <ul style="list-style-type: none"> • failure to save and retain information • loss of data • technology issues (e.g. network problems).
Self-management: Recognises and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	<p>Explicit and implicit protocols may relate to:</p> <ul style="list-style-type: none"> • internet usage policies • organisational and industry codes of conduct • social media policies • workflows.
Planning and organising: Applies <i>formal processes</i> when planning complex tasks, producing plans with logically sequenced steps	<p>Formal processes may refer to:</p> <ul style="list-style-type: none"> • escalation and approval processes • organisational workflows.
Knowledge Evidence	Notes
<i>Formatting styles</i> and their effect on formatting, readability and appearance of documents	<p>Formatting styles may include using:</p> <ul style="list-style-type: none"> • bold, italics and underline functions • bullet points • heading styles • paragraph marks.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i> relevant to performance evidence	<p>Workplace documentation and resources may include:</p> <ul style="list-style-type: none"> • forms • minutes • notes • organisational policies and procedures • reports • spreadsheets • style guides.



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BSBTEC402 Design and produce complex spreadsheets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Organise personal work environment in accordance with <i>ergonomic requirements</i>	Ergonomic requirements may relate to: <ul style="list-style-type: none"> • breaks • lighting • manual handling • movement • technology • temperature • time management • work and task design • work stations • ventilation.
1.2 Analyse task and determine <i>specifications for spreadsheets</i>	Specifications for spreadsheets may relate to: <ul style="list-style-type: none"> • application functionality • data • document purpose and structure.
1.4 Apply work <i>organisation strategies</i> and energy and <i>resource conservation techniques</i>	Organisation strategies and resource conservation techniques may include using: <ul style="list-style-type: none"> • digital tools over paper-based systems • power-saving functions on computers.
2.1 Use spreadsheet design <i>software functions and formulae</i> to meet identified requirements	Software functions and formulae may relate to: <ul style="list-style-type: none"> • comparing data • date functions.
4.2 Import and export data between compatible spreadsheets and adjust documents, according to <i>software and organisational procedures</i>	Software and organisational procedures may relate to: <ul style="list-style-type: none"> • spreadsheet formats and templates.
5.3 Name and store spreadsheet in accordance with <i>organisational requirements</i> and exit application	Organisational requirements may relate to: <ul style="list-style-type: none"> • naming conventions • storage, security and access • version control.
Foundation Skills	Notes
Reading: Recognises and interprets numerical and textual information within a range of <i>sources</i> to determine and complete work according to requirements	Sources may include: <ul style="list-style-type: none"> • intranet • job descriptions • organisational policies and procedures • style guides.
Numeracy: Represents mathematical information in an <i>alternative form</i> and analyses information to determine required spreadsheet formulae and macros	Alternative forms may include: <ul style="list-style-type: none"> • using visual aids (e.g. graphs).



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BSBTEC402 Design and produce complex spreadsheets

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Self-management: Recognises and follows <i>explicit and implicit protocols</i> and meets expectations associated with own role	Explicit and implicit protocols may relate to: <ul style="list-style-type: none"> internet usage policies organisational and industry codes of conduct social media policies workflows.
Planning and organising: Applies <i>formal processes</i> when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps	Formal processes may refer to: <ul style="list-style-type: none"> escalation and approval processes organisational workflows.
Performance Evidence	Notes
Follow organisational and <i>safe work practices</i>	Safe work practices may relate to: <ul style="list-style-type: none"> work health and safety (WHS) requirements (e.g. taking regular breaks).
Resolve <i>issues</i> by referring to user documentation and online help	Issues may relate to: <ul style="list-style-type: none"> failure to save and retain information loss of data storage, security and access technology issues (e.g. network problems).
Knowledge Evidence	Notes
<i>Key aspects of formatting and design</i> on presentation and readability of data	Key aspects of formatting and design may relate to: <ul style="list-style-type: none"> accessibility using different visual aids (e.g. charts, graphs, tables).
<i>Key methods to test formulae</i>	Key methods to test formulae may include: <ul style="list-style-type: none"> peer review supervisor validation.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBTEC403 Apply digital solutions to work processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services"
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify available workplace <i>digital applications</i> for communications, technologies and networks	Digital applications may include: <ul style="list-style-type: none"> cloud-based storage systems digital communication tools (e.g. emails) mobile databases.
1.2 Locate and use <i>digital information</i>	Digital information may include: <ul style="list-style-type: none"> charts worksheets.
1.3 Review digital information <i>sources</i> for validity and reliability	Sources may include: <ul style="list-style-type: none"> intranet job descriptions organisational policies and procedures style guides.
2.1 Identify <i>areas in workplace</i> that could integrate <i>digital solutions</i>	Areas in the workplace may include: <ul style="list-style-type: none"> administration information technology (IT) department security. Digital solutions may include: <ul style="list-style-type: none"> timesheet software.
2.3 Review digital solutions that are fit for purpose and according to <i>organisational policies and procedures</i>	Organisational policies and procedures may relate to: <ul style="list-style-type: none"> privacy and confidentiality social media storage, security and access work health and safety (WHS).
2.5 Identify and adopt <i>digital media protocols and conventions</i>	Digital media protocols and conventions may relate to: <ul style="list-style-type: none"> naming conventions password protection.
3.1 Identify relevant <i>intellectual property legislation, regulations and the organisational policy</i>	Intellectual property legislation may include: <ul style="list-style-type: none"> Copyright Act 1968 Intellectual Property Laws Amendment Act 2015 Patents Act 1990 Privacy Act 1988. Regulations and organisational policy may relate to: <ul style="list-style-type: none"> social media storage, security and access.



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BSBTEC403 Apply digital solutions to work processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.3 Document, register and report <i>relevant matters</i> related to intellectual property	Relevant matters may include: <ul style="list-style-type: none"> plagiarism.
Foundation Skills	Notes
Reading: Sources, analyses and interprets information in the context of <i>organisational strategy and compliance requirements</i>	Organisational strategy and compliance requirements may relate to: <ul style="list-style-type: none"> annual reports legislation organisational strategy documents regulations.
Knowledge Evidence	Notes
<i>Strategies to train and support team members</i> in applying digital technology	Strategies to train and support team members may include creating: <ul style="list-style-type: none"> learning and development opportunities performance management plans.
<i>Key elements to consider</i> when evaluating whether digital technology and information options are fit for purpose	Key elements to consider may include: <ul style="list-style-type: none"> availability and accessibility costs technical skills requirements.
Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBTEC404 Use digital technologies to collaborate in a work environment

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40620 Certificate IV in Legal Services BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Identify available <i>digital technologies</i> by accessing relevant sources of information	Digital technologies may include: <ul style="list-style-type: none"> collaborative tools (e.g. instant messaging functions) project management and productivity tools (e.g. Kanban boards) virtual meeting technology.
2.2 Seek assistance from <i>specialist advisors</i> , where required	Specialist advisors may include: <ul style="list-style-type: none"> information technology (IT) department software providers.
3.2 Communicate and promote <i>key features</i> of the plan to <i>relevant stakeholders</i>	Key features may include: <ul style="list-style-type: none"> recording and tracking. <p>Key features may depend on the organisation.</p> Relevant stakeholders may include: <ul style="list-style-type: none"> decision-makers end users of systems.
3.3 Implement digital technologies according to plan and <i>organisational requirements, policies and procedures</i>	Organisational requirements, policies and procedures may relate to: <ul style="list-style-type: none"> budgets and finances network capabilities (e.g. bandwidth) timeframes.
Foundation Skills	Notes
Reading: Organises, evaluates and critiques information from a wide variety of <i>textual material</i>	Textual material may include: <ul style="list-style-type: none"> job descriptions organisational policies and procedures style guides.
Performance Evidence	Notes
Collect, analyse and present <i>relevant information</i> about digital applications	Relevant information may include: <ul style="list-style-type: none"> availability and accessibility costs technical skill requirements.



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BSBTEC404 Use digital technologies to collaborate in a work environment**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40620 Certificate IV in Legal Services BSB40920 Certificate IV in Project Management Practice BSB50120 Diploma of Business BSB50620 Diploma of Marketing and Communication
Skill sets	BSBSS00113 Digital Business Administration Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Strategies for training and coaching</i> in digital technologies	Strategies for training and coaching may include developing: <ul style="list-style-type: none"> training plans.
Assessment Conditions	Notes
<i>Workplace equipment and resources</i> relevant to performance evidence	Workplace equipment and resources may include: <ul style="list-style-type: none"> computers and laptops internet access paper and pens software.
Relevant <i>legislation, regulations, standards and codes</i>	Legislation may include: <ul style="list-style-type: none"> anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988. Regulations, standards and codes may relate to: <ul style="list-style-type: none"> organisational and industry codes of practice and conduct social media storage, security and access.



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BSBTEC405 Review and maintain organisation's digital presence

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB50520 Diploma of Library and Information Services"
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Monitor and analyse customer and user feedback according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> customer service privacy and confidentiality.
1.3 Make recommendations on changes to digital presence and its content in response to feedback, data analysis and relevant <i>regulatory requirements</i>	Regulatory requirements may relate to: <ul style="list-style-type: none"> content restrictions organisational templates.
2.2 Replace superseded and inaccurate information with current information and add additional material according to <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> network capabilities (e.g. bandwidth) storage, security and access.
2.3 Follow <i>protocols</i> for ensuring the accuracy and authenticity of information	Protocols may relate to: <ul style="list-style-type: none"> quality assurance.
2.6 Follow <i>security procedures</i> for updating digital presence	Security procedures may include: <ul style="list-style-type: none"> password protection.
3.1 Analyse user feedback to confirm <i>faults</i> are not user issues	Faults may include: <ul style="list-style-type: none"> information errors network failures.
3.3 Add <i>new digital features</i> and remove redundant features according to organisational requirements	New digital features may include: <ul style="list-style-type: none"> 24-hour operations interactive dashboards.
Foundation Skills	Notes
Problem solving: Contributes to continuous improvement of digital presence by applying <i>basic principles of analytical thinking</i>	Basic principles of analytical thinking may relate to: <ul style="list-style-type: none"> breaking down complex information deductive thinking logical thinking problem-solving techniques.
Technology: Understands the purposes, specific <i>functions and key features of common digital systems and tools</i> and operates them effectively to complete tasks in accordance with security requirements	Functions and key features of common digital systems and tools may relate to: <ul style="list-style-type: none"> editing formatting internet searching secure passwords. <p>Functions and features may depend on the digital system and tool.</p>



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BSBTEC405 Review and maintain organisation's digital presence

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30220 Certificate III in Entrepreneurship and New Business BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB50520 Diploma of Library and Information Services"
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Key provisions of relevant <i>legislation, regulations, and standards and codes of practice</i> that may affect aspects of organisation's digital presence	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Copyright Act 1968 • Intellectual Property Laws Amendment Act 2015 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988. <p>Regulations and standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> • organisational and industry codes of practice • social media • storage, security and access.
<i>Basic principles of design and maintenance</i> of relevant platforms	<p>Basic principles of design and maintenance may relate to:</p> <ul style="list-style-type: none"> • accessibility • balancing text and visual aids • ease of use.
<i>Key methods of data analysis</i> relevant to online stakeholder engagement	<p>Key methods of data analysis may relate to:</p> <ul style="list-style-type: none"> • qualitative analysis (e.g. focus groups, interviews) • quantitative analysis (e.g. forms, surveys, dashboards).
Assessment Conditions	Notes
<i>Workplace equipment and resources</i>	<p>Workplace equipment and resources may include:</p> <ul style="list-style-type: none"> • computers and laptops • digital tools (e.g. spreadsheets, word processing tools) • manuals • organisational templates.
<i>Organisational policies and procedure</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • inclusive practices • organisational and industry codes of conduct • social media • storage, security and access.



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BSBTEC501 Develop and implement an e-commerce strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Complete value chain analysis and identify <i>processes and relationships that may benefit</i> from the adoption of e-commerce solutions, according to organisational strategies	Processes and relationships that may benefit may relate to: <ul style="list-style-type: none"> customer service supply chains.
1.5 Identify and evaluate <i>legal and ethical issues</i> in e-commerce opportunities	Legal and ethical issues may include: <ul style="list-style-type: none"> conflicts of interest.
2.1 Identify and analyse business to business, business to consumer, intra organisational <i>e-commerce applications</i> and e-commerce models, and assess applicability to own organisation	E-commerce applications may include: <ul style="list-style-type: none"> cloud-based storage systems digital communication tools mobile databases.
3.3 Identify and obtain <i>technical needs and expertise</i> required to implement e-commerce model	Technical needs and expertise may include: <ul style="list-style-type: none"> software proficiency technical writing.
3.4 Investigate and identify possible <i>culture issues</i> , and develop plan to manage transition to e-commerce, according to organisational policies and procedures	Culture issues may relate to: <ul style="list-style-type: none"> differing standards and expectations linguistic barriers.
Foundation Skills	Notes
Reading: Interprets a range of <i>textual information</i> to evaluate opportunities, possible exemplars and technical considerations	Textual information may include: <ul style="list-style-type: none"> industry reports organisational policies and procedures technology user manuals.
Writing: Takes personal notes and develops <i>workplace documentation</i> that clarifies complex ideas using language and structure to suit context and audience	Workplace documentation may include: <ul style="list-style-type: none"> business plans meeting minutes reports.



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BSBTEC501 Develop and implement an e-commerce strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Methods for conducting value chain analysis when assessing potential e-commerce solutions</i>	<p>Methods for conducting value chain analysis may consider:</p> <ul style="list-style-type: none"> inbound logistics operations outbound logistics.
<i>Key features of relevant legislation, regulations, standards and codes of practice that may affect the implementation of e-commerce solution</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> Privacy Act 1988. <p>Regulations, standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> organisational and industry codes of practice storage, security and access.
<i>Key features of common e-commerce models</i>	<p>Key features of common e-commerce models may include:</p> <ul style="list-style-type: none"> long sale cycles multiple users.
<i>Key features of organisational strategy related to e-commerce solutions</i>	<p>Key features of organisational strategy may include:</p> <ul style="list-style-type: none"> goals and objectives timeframes.
Assessment Conditions	Notes
<i>Workplace equipment and resources</i>	<p>Workplace equipment and resources may include:</p> <ul style="list-style-type: none"> computers and laptops digital tools (e.g. spreadsheets, word processing tools) manuals organisational templates.



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BSBTEC601 Review organisational digital strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business	BSB50120 Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management BSB60520 Advanced Diploma of Marketing and Communication BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Obtain and interpret information on <i>organisation's policies, procedures</i> and objectives related to digital strategy	Organisation's policies and procedures may relate to: <ul style="list-style-type: none"> communication organisational templates organisational vision, mission and values privacy and confidentiality.
1.3 Prepare review plan detailing established <i>review criteria</i> , organisational objectives and the information to be collected	Review criteria may relate to: <ul style="list-style-type: none"> organisational goals and objectives.
2.1 Source <i>relevant information</i> according to review plan	Relevant information may relate to: <ul style="list-style-type: none"> costs resource requirements.
2.3 Discuss <i>issues</i> interpreting information and address appropriately in consultation with relevant stakeholders	Issues may include: <ul style="list-style-type: none"> vague subject matter.
5.5 Present final report and obtain approval from <i>authorised stakeholders</i>	Authorised stakeholders may include: <ul style="list-style-type: none"> decision-makers end users of systems.
Foundation Skills	Notes
Reading: Identifies, interprets, analyses or reviews <i>complex texts</i> from various <i>sources</i> to determine, organisational operations, specific requirements and responsibilities	Complex texts may include: <ul style="list-style-type: none"> briefings legislation organisational policies and procedures reports.
Writing: Collates and compiles results of research and analysis using appropriate <i>technical language</i> and <i>organisational formats</i>	Technical language and organisational formats may be sourced from: <ul style="list-style-type: none"> organisational templates style guides.
Self-management: Responsible for following <i>policies, procedures</i> and <i>legislative requirements</i>	Policies and procedures may relate to: <ul style="list-style-type: none"> storage, security and access. Legislative requirements may relate to: <ul style="list-style-type: none"> Privacy Act 1988.
Planning and organising: Plans, develops, implements and monitors <i>processes for reviewing digital strategy performance</i>	Processes for reviewing digital strategy performance may include: <ul style="list-style-type: none"> evaluating performance against organisational goals.



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BSBTEC601 Review organisational digital strategy**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60120 Advanced Diploma of Business	BSB50120 Diploma of Business BSB60320 Advanced Diploma of Human Resource Management BSB60420 Advanced Diploma of Leadership and Management BSB60520 Advanced Diploma of Marketing and Communication BSB80320 Graduate Diploma of Strategic Leadership
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses <i>digital technologies and systems</i> safely, legally and ethically to access, store and share information	Digital technologies and systems may include: <ul style="list-style-type: none"> • collaborative tools • project management and productivity applications (e.g. Kanban boards) • virtual meeting technology.
Knowledge Evidence	Notes
<i>Digital strategy review methodologies</i>	Digital strategy review methodologies may relate to: <ul style="list-style-type: none"> • evaluating performance against organisational goals.
<i>Features of review plans, methodology and criteria</i>	Features may include: <ul style="list-style-type: none"> • accountabilities • goals • timelines.
<i>Format and content of digital strategy report</i>	Format and content may relate to: <ul style="list-style-type: none"> • organisational templates • style guides.
<i>Common recommendations for actions to improve digital strategy</i>	Recommendations for actions may involve: <ul style="list-style-type: none"> • analysing customer demands and industry trends.
<i>Methods of distribution of the final review report</i>	Methods of distribution may include: <ul style="list-style-type: none"> • emails • presentations • team meetings.
Assessment Conditions	Notes
<i>Workplace equipment and resources</i> relevant to performance evidence	Workplace equipment and resources may include: <ul style="list-style-type: none"> • computers and laptops • digital tools (e.g. spreadsheets, word processing tools) • manuals • organisational templates.



Teamwork and Relationships

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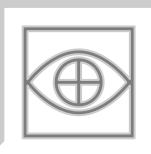
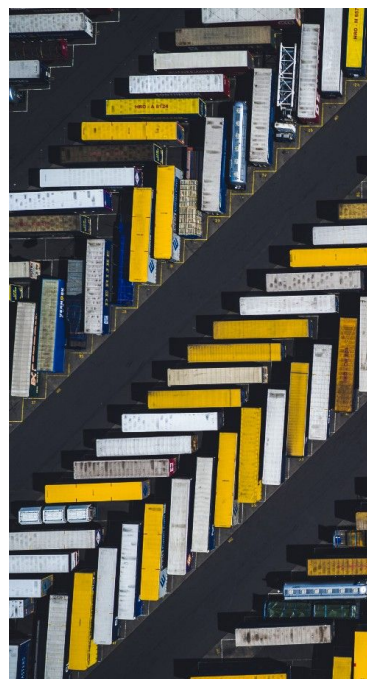
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Teamwork and Relationships Unit Sector Overview

The Teamwork and Relationships (TWK) unit sector incorporates units of competency aimed at supporting individuals in various industries and job roles to develop key skills to work effectively with others and establish business networks.

An individual that has the skills to work (and build relationships) with others is more likely to be effective in a workplace environment, particularly as digital technologies create more opportunities to work collaboratively.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Protocols	Protocols outline explicit and specific plans that specify procedures to be followed in defined situations.

Teamwork and Relationships Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Teamwork and Relationships' unit stream, please refer to the interpretation guidance provided on pages 594 - 606. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBTWK201 Work effectively with others

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Contribute to workgroup goals and tasks according to <i>organisational requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • job descriptions • organisational and industry codes of conduct • organisational goals and values • organisational policies and procedures • work instructions.
2.3 Share work-related information with workgroup according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • communication • contributing to team meetings • diversity and inclusion • equal employment opportunity (EEO) • induction and orientation • toolbox talks • work health and safety (WHS).
2.4 Plan <i>strategies for team performance improvement</i> with workgroup	<p>Strategies for team performance improvement may include:</p> <ul style="list-style-type: none"> • coaching and mentoring • consultation regarding work expectations • continual improvement processes • effective team management strategies • performance management processes • proactive team mindsets.
3.2 Respond to any linguistic and cultural differences in communication styles according to <i>legislation, organisational policies and procedures and ethical standards</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984). <p>Organisational policies and procedures and ethical standards may relate to:</p> <ul style="list-style-type: none"> • bullying and harassment policies • diversity and inclusion policies • organisational and industry codes of conduct.



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BSBTWK201 Work effectively with others

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB10120 Certificate I in Workplace Skills BSB20120 Certificate II in Workplace Skills
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Writing: Completes required <i>documentation</i> using <i>organisational formats</i>	<p>Documentation may include:</p> <ul style="list-style-type: none"> • emails • reports. <p>Organisational formats may include using:</p> <ul style="list-style-type: none"> • online forms • organisational templates • Safe Work and Fair Work templates • system documentation (e.g. customer relationship management [CRM] databases).
Initiative and enterprise: Identifies responsibilities of own role and follows <i>explicit and implicit organisational protocols and procedures</i>	<p>Explicit and implicit organisational protocols and procedures may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • bullying and harassment policies • diversity and inclusion policies • organisational and industry codes of conduct. <p>Organisational protocols may be spoken and unspoken.</p>
Knowledge Evidence	Notes
<i>Key problems and conflicts</i> arising in workgroup contexts	<p>Key problems and conflicts may be:</p> <ul style="list-style-type: none"> • conflicts between different parts of an organisation • customer complaints • equal opportunity issues • interpersonal conflicts • resource issues.
Assessment Conditions	Notes
Methods of resolving team problems including referral to <i>relevant organisational personnel</i>	<p>Relevant organisational personnel may include:</p> <ul style="list-style-type: none"> • employee representatives • human resources (HR) officers • line managers • team management • team members.
<i>Conflict resolution techniques</i>	<p>Conflict resolution techniques may include:</p> <ul style="list-style-type: none"> • mediation • mentoring and coaching • negotiation.



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BSBTWK301 Use inclusive work practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business	BSB30420 Certificate III in Library and Information Services BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>organisational policies and procedures</i> relating to inclusive work practices	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • bullying and harassment policies • diversity and inclusion policies • organisational and industry codes of conduct.
1.3 Assist <i>relevant personnel</i> in developing plan for incorporating inclusive practices in work tasks	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • diversity champions • employee representatives • human resources (HR) officers • line managers • team management • team members.
2.3 Identify and implement <i>inclusive work practices</i> to demonstrate value of diversity in the workplace	<p>Inclusive work practices may relate to:</p> <ul style="list-style-type: none"> • bullying and harassment policies • diversity and inclusion policies • organisational and industry codes of conduct.
3.3 Incorporate feedback and make improvements to work practices according to <i>legislative requirements</i> and <i>enterprise guidelines</i>	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Fair Work Act 2009 • applicable federal and state/territory WHS legislation. <p>Enterprise guidelines may relate to:</p> <ul style="list-style-type: none"> • award and enterprise agreements • key performance indicators (KPIs) • organisational policies and procedures.
Performance Evidence	Notes
Comply with <i>workplace inclusivity regulations, standards and codes of practice</i>	<p>Workplace inclusivity regulations, standards and codes of practice may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • bullying and harassment policies • diversity and inclusion policies • organisational and industry codes of conduct.



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BSBTWK301 Use inclusive work practices**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business	BSB30420 Certificate III in Library and Information Services BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Workplace <i>anti-discrimination legislation</i> and standards	Anti-discrimination legislation may include: <ul style="list-style-type: none"> • Age Discrimination Act 2004 • Disability Discrimination Act 1992 • Fair Work Act 2009 • Racial Discrimination Act 1975 • Sex Discrimination Act 1984.
Assessment Conditions	Notes
<i>Legislation, standards and codes of practice</i> for working with diversity	Legislation may include: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009. Standards and codes of practice may relate to: <ul style="list-style-type: none"> • organisational and industry codes of conduct.
<i>Organisational diversity policies and procedures</i>	Organisational diversity policies and procedures may relate to: <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • bullying policies • diversity and inclusion policies • organisational and industry codes of conduct.



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BSBTWK401 Build and maintain business relationships**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business	BSB30220 Certificate III in Entrepreneurship and New Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Determine <i>networking opportunities</i> according to identified objectives and organisational policies and procedures	Networking opportunities may include: <ul style="list-style-type: none"> professional webinars and seminars regional and wider networking opportunities social media connections (e.g. LinkedIn) team meetings.
1.3 Confirm <i>communication channels</i> for information exchange with business contacts	Communication channels may include: <ul style="list-style-type: none"> emails meetings and seminars telephone calls.
2.1 Use <i>communication techniques</i> to establish rapport with business contacts	Communication techniques may relate to: <ul style="list-style-type: none"> push, pull and interactive communication non-verbal communication (e.g. body language, eye contact) verbal communication (e.g. tone).
2.2 Identify <i>barriers to business development opportunities</i>	Barriers to business development opportunities may relate to: <ul style="list-style-type: none"> budgets and finances business structure and location communications barriers competing priorities competition and globalisation culture legislation (e.g. intellectual property [IP]) staff reward elements technology unexpected external risks (e.g. health, economic or environmental).
2.4 Seek <i>specialist advice</i> in the development of contacts, as required	Specialist advice may be sourced from: <ul style="list-style-type: none"> industry associations industry contacts line managers team members.



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BSBTWK401 Build and maintain business relationships

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business	BSB30220 Certificate III in Entrepreneurship and New Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Develop <i>strategies</i> to represent and promote organisational interests to contacts	Strategies may relate to: <ul style="list-style-type: none"> conferences and seminars consultations with business development departments organisational promotional policies and procedures.
Performance Evidence	Notes
Participate in formal and informal <i>networking opportunities</i> that promote the business	Networking opportunities may include: <ul style="list-style-type: none"> professional webinars and seminars regional and wider networking opportunities social media connections (e.g. LinkedIn) team meetings.
Knowledge Evidence	Notes
<i>Principles and techniques</i> needed to negotiate positive outcomes	Principles and techniques may include: <ul style="list-style-type: none"> building rapport meeting needs of contacts regular follow up win-win principle.
<i>Organisational policies, plans and procedures</i> relevant to business relationships	Organisational policies, plans and procedures may relate to: <ul style="list-style-type: none"> communication confidentiality and privacy general media levels and limits of authority reporting lines social media.
<i>Methods for obtaining feedback</i> on business relationships	Methods for obtaining feedback may include: <ul style="list-style-type: none"> asking for direct feedback maintaining informal coaching relationships surveys.



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BSBTWK401 Build and maintain business relationships**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business	BSB30220 Certificate III in Entrepreneurship and New Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50720 Diploma of Paralegal Services
Skill sets	BSBSS00110 Business Development Skill Set	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Workplace documentation and resources</i>	Workplace documentation and resources may include: <ul style="list-style-type: none"> • forms • minutes • simple reports • spreadsheets • style guides.



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BSBTWK501 Lead diversity and inclusion

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00117 Diversity and Inclusion Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Identify staff struggling to work with diversity and implement <i>measures to support working with diversity</i>	<p>Measures to support working with diversity may include:</p> <ul style="list-style-type: none"> • annual mandatory training • creating awareness of education and training opportunities • developing diversity support structures • individual coaching and mentoring • support from human resources (HR).
2.3 Develop <i>processes</i> to demonstrate benefits of working with various diverse groups	<p>Processes may include:</p> <ul style="list-style-type: none"> • internal communications plans • media coverage • tool box talks • working groups to troubleshoot problems and communicate outcomes to others.
3.1 Promote organisational workforce diversity in <i>external forums</i>	<p>External forums may include:</p> <ul style="list-style-type: none"> • conferences / seminars • external publications • social media.
Foundation Skills	Notes
Reading: Identifies, analyses and evaluates <i>complex texts</i> to determine particular diversity requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> • legislation • organisational policies and procedures • organisational strategy documents.
Writing: Records investigation findings according to <i>organisational and legislative requirements</i>	<p>Organisational and legislative requirements may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • applicable federal and state/territory WHS legislation • Fair Work Act 2009 • Privacy Act 1988.



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BSBTWK501 Lead diversity and inclusion

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management
Skill sets	BSBSS00117 Diversity and Inclusion Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Implement <i>strategies</i> to improve awareness of <i>challenges</i> experienced by individuals from diverse groups in the work team	<p>Strategies may include:</p> <ul style="list-style-type: none"> coaching / mentoring publishing in internal communications (e.g. newsletter) training sharing success stories. <p>Challenges may include:</p> <ul style="list-style-type: none"> discrimination limited exposure, experience and opportunities.
Follow <i>procedures</i> for handling complaints or harassment allegations	<p>Procedures may include:</p> <ul style="list-style-type: none"> counselling dispute resolution procedures following relevant customer service policies grievance procedures mediation.
Knowledge Evidence	Notes
<i>Organisational processes for feedback</i> on policy	<p>Organisational processes for feedback may include:</p> <ul style="list-style-type: none"> conducting culture surveys.
Assessment Conditions	Notes
<i>Legislation, regulations and codes of practice</i> for managing diversity	<p>Legislation may include:</p> <ul style="list-style-type: none"> anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) applicable federal and state/territory WHS legislation Fair Work Act 2009 Privacy Act 1988. <p>Regulations and codes of practice may relate to:</p> <ul style="list-style-type: none"> change management and reporting equal employment opportunity (EEO) industry standards and industry codes of practice.
<i>Workplace diversity policies and procedures</i>	<p>Workplace diversity policies and procedures may incorporate reference to:</p> <ul style="list-style-type: none"> anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) bullying and harassment policies diversity and inclusion policies organisational and industry codes of conduct.



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BSBTWK502 Manage team effectiveness

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety	BSB50120 Diploma of Business BSB50820 Diploma of Project Management BSB50920 Diploma of Quality Auditing BSB51319 Diploma of Work Health and Safety
Skill sets	BSBSS00127 Contact Centre Team Manager Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Develop <i>performance plans</i> with expected outcomes, key performance indicators (KPIs) and goals for work team	Performance plans may include: <ul style="list-style-type: none"> evaluation and measurement processes job descriptions learning and development targets operational plans.
2.1 Develop <i>strategies for facilitating team member input</i> into planning, decision making and operational aspects of team tasks	Strategies for facilitating team member input may include: <ul style="list-style-type: none"> breaking down strategic plans into actionable steps individual consultation with team members regular team meetings.
2.4 Develop <i>processes for identifying and addressing issues, concerns and problems</i> identified by team members	Processes for identifying and addressing issues, concerns and problems may include: <ul style="list-style-type: none"> escalating according to organisational reporting lines.
4.1 Establish and maintain open communication processes with <i>relevant stakeholders</i>	Relevant stakeholders may include: <ul style="list-style-type: none"> finance team members human resources (HR) officers management.
Knowledge Evidence	Notes
<i>Strategies that can support team cohesion, participation and performance</i>	Strategies that can support team cohesion, participation and performance may include: <ul style="list-style-type: none"> coaching and mentoring following inclusive work practices.
<i>Strategies for gaining consensus</i>	Strategies for gaining consensus may include: <ul style="list-style-type: none"> discussing ideas and differences in opinion.
<i>Issue resolution strategies</i>	Issue resolution strategies may include: <ul style="list-style-type: none"> counselling following grievance and dispute resolution procedures following relevant customer service policies mediation.
Assessment Conditions	Notes
<i>Workplace documents</i> relevant to team task objectives	Workplace documents may include: <ul style="list-style-type: none"> forms minutes reports.



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BSBTWK503 Manage meetings

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Establish and verify <i>meeting requirements</i> with relevant individuals	Meeting requirements may include: <ul style="list-style-type: none"> • Intention of the meeting (and desired outcomes) • structure of the meeting.
1.3 Contact and confirm meeting with participants according to <i>organisational procedures</i>	Organisational procedures may relate to: <ul style="list-style-type: none"> • communications policies • confidentiality and privacy • general media policies • levels and limits of authority • reporting lines • social media policies.
2.1 Chair meetings according to <i>organisational requirements</i> , agreed conventions for type of meeting and legal and ethical requirements	Organisational requirements may relate to: <ul style="list-style-type: none"> • Acknowledgement of Country / Welcome to Country • diversity and inclusion • industry requirements • language and literacy considerations.
3.2 Distribute and store minutes and other <i>follow up documentation</i> within designated timelines, and according to organisational requirements	Follow up documentation may include: <ul style="list-style-type: none"> • actions lists • analysis of meeting outcomes • improvement opportunities • legal status of meetings • meeting reports • status updates.

Foundation Skills	Notes
Reading: Identifies and interprets information from <i>complex texts</i> including organisational policies and procedures	Complex texts may include: <ul style="list-style-type: none"> • extensive meeting minutes, including technical information • legislation • meeting transcripts • reports.
Enterprise and initiative: Identifies and responds to both <i>explicit and implicit organisational procedures and protocols</i> and legislative and regulatory requirements	Explicit and implicit organisational procedures and protocols may relate to: <ul style="list-style-type: none"> • internet usage policies • organisational and industry codes of conduct • social media policies • workflows.



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BSBTWK503 Manage meetings**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40820 Certificate IV in Marketing and Communication BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Meeting terminology, structures and arrangements</i>	Meeting terminology, structures and arrangements may relate to: <ul style="list-style-type: none"> governance requirements (including decision-making protocols) virtual meeting technology and associated features and functions.
<i>Key features of options for meetings</i> including face-to-face and virtual meetings	Keys features of options for meetings may include: <ul style="list-style-type: none"> accessibility features.
Responsibilities of the chairperson and <i>key features of group dynamics</i> in relation to managing meetings	Key features of group dynamics may relate to: <ul style="list-style-type: none"> legislative requirements referring to organisation policies and procedures.
<i>Methods for recording meeting notes</i> including relevant organisational requirements and conventions for type of meeting	Methods for recording meeting notes may include: <ul style="list-style-type: none"> manual note-taking recording functions of virtual meeting technology speech transcription applications.
Assessment Conditions	Notes
Computers and <i>relevant software</i>	Relevant software may include: <ul style="list-style-type: none"> digital calendar applications virtual meeting technology.



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BSBTWK601 Develop and maintain strategic business networks

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify potential business contacts according to <i>networking objectives and organisational strategy</i>	Networking objectives and organisational strategy may relate to: <ul style="list-style-type: none"> industry and specialist support industry currency.
2.2 Communicate with <i>relevant stakeholders</i> the advantages of developing business relationship according to plan	Relevant stakeholders may include: <ul style="list-style-type: none"> board members senior management shareholders.
3.2 Develop <i>plan for maintaining strategic business relationships</i>	Plans for maintaining strategic business relationships may relate to: <ul style="list-style-type: none"> aligning personal plans with strategic organisation plans governance monitoring and evaluation.
Foundation Skills	Notes
Reading: Identifies and interprets information from <i>complex texts</i> including organisational policies and procedures	Complex texts may include: <ul style="list-style-type: none"> industry thought leadership legislation reports.
Knowledge Evidence	Notes
<i>Key features of organisational strategy</i>	Key features of organisational strategy may include: <ul style="list-style-type: none"> accountabilities key performance indicators (KPIs) organisational vision, mission and values.
Common opportunities and <i>risks</i> associated with business collaboration	Risks may include: <ul style="list-style-type: none"> loss of assets loss of key personnel loss of intellectual property.
Assessment Conditions	Notes
<i>Organisational strategy documents</i> relevant to performance evidence	Organisational strategy documents may include: <ul style="list-style-type: none"> evaluation and measurement processes learning and development plans operational plans.



Work Health and Safety

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Work Health and Safety

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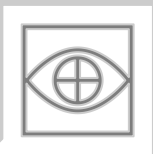
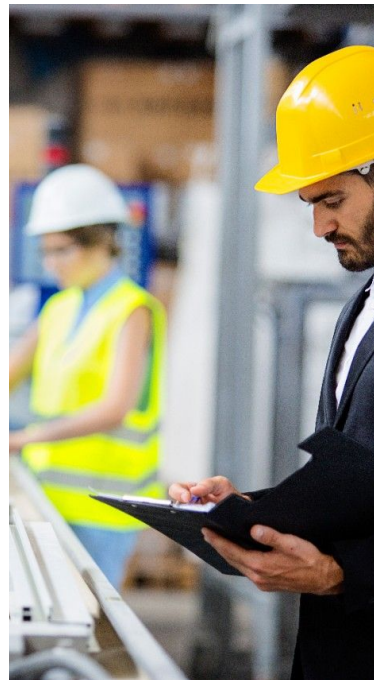
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Work Health and Safety (WHS) Unit Sector Overview

The Work Health and Safety (WHS) unit sector incorporates specialist units of competency aimed at supporting both individuals performing work health and safety duties in addition to their main duties, as well as individuals responsible for the coordination, facilitation and maintenance of work health and safety within an organisation.



Glossary of common terminology

Hazard	A hazard is a situation or thing that has the potential to harm a person.
Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
PCBU	PCBU stands for Person Conducting a Business or Undertaking.
Risk	Risk is the possibility that harm (death, injury or illness) might occur when exposed to a hazard.
State, territory and Commonwealth work health and safety (WHS) legislation	<p>Australian states and territories have specific WHS laws and regulators, however the WHS framework within each state includes the:</p> <ul style="list-style-type: none"> • Act • codes of practice • regulations • regulating agency (regulator). <p>Relevant state, territory and Commonwealth legislative resources can be found at the following sources:</p> <ul style="list-style-type: none"> • ACT, Commonwealth, NSW, NT, QLD, SA, TAS, VIC, WA.

Work Health and Safety Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Work Health and Safety' unit stream, please refer to the interpretation guidance provided on pages 610 - 673. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBWHS211 Contribute to the health and safety of self and others**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB20120 Certificate II in Workplace Skills	BSB10120 Certificate I in Workplace Skills BSB30320 Certificate III in Legal Services
Skill sets	BSBSS00125 Workplace Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Carry out work tasks according to <i>WHS instructions</i>	WHS instructions may relate to: <ul style="list-style-type: none"> • Job Safety Analysis (JSA) outcomes • organisational policies and procedures • Safe Work Method Statements (SWMS) • work instructions (e.g. from supervisors or according to job role).
2.1 Identify <i>individuals and/or parties</i> to whom queries and concerns about safety in the workplace should be directed	Individuals and/or parties may include: <ul style="list-style-type: none"> • health and safety representatives (HSRs) • management • supervisors • work health and safety officers (WHSOs).
2.4 Identify and report incidents and injuries to <i>required personnel</i> according to organisational policies and procedures	Required personnel may include: <ul style="list-style-type: none"> • first aid officers • HSRs • supervisors • WHSOs.
3.1 Contribute to workplace meetings, inspections, and <i>other WHS consultative activities</i>	Other WHS consultative activities may include: <ul style="list-style-type: none"> • collecting insights • safety committee meetings • toolbox talks.
3.3 Participate in <i>actions to minimise or eliminate workplace hazards and to reduce risks</i>	Actions to minimise or eliminate workplace hazards and to reduce risks may include: <ul style="list-style-type: none"> • hierarchy of controls • regular inspections • risk assessments • walkthroughs.
Knowledge Evidence	Notes
<i>Process of hazard identification and risk control</i>	Process of hazard identification and risk control may include using: <ul style="list-style-type: none"> • organisational templates and systems.
Assessment Conditions	Notes
<i>WHS laws</i> relevant to performance evidence requirements	WHS laws may include: <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.



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BSBWHS307 Apply knowledge of WHS laws in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and access <i>current standards</i> and <i>WHS laws</i> relevant to the workplace, occupation and industry	<p>Current standards may include:</p> <ul style="list-style-type: none"> national and international industry standards Safe Work standards. <p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
1.2 Apply knowledge of relationship between WHS laws and <i>related documentation</i> to assist in identifying WHS legislative requirements in the workplace	<p>Related documentation may include:</p> <ul style="list-style-type: none"> organisational policies and procedures national and international industry standards Safe Work standards.
1.3 Identify <i>consequences of non-compliance</i> with WHS laws and organisational WHS policies, procedures, processes and systems	<p>Consequences of non-compliance may include:</p> <ul style="list-style-type: none"> fines penalty points prosecution. <p>Consequences may depend on industry and non-compliance size and type.</p>
1.4 Identify <i>duty holders</i> and their role in the workplace	<p>Duty holders may include:</p> <ul style="list-style-type: none"> business directors designers manufacturers officers PCBUs supervisors holding relevant licences workers. <p>Duty holders refers to any person who owes a WHS duty under the WHS Act.</p>
1.5 Identify legal obligations and duties about <i>who to consult with regarding training</i> of workers and health and safety representatives	<p>Individuals to consult with regarding training may include:</p> <ul style="list-style-type: none"> employees duty holders safety committees work health and safety officers (WHSOs).
2.1 Assist in <i>monitoring workplace compliance</i> with WHS laws according to organisational policies and procedures	<p>Monitoring workplace compliance may involve:</p> <ul style="list-style-type: none"> engagement activities referencing measurable key performance indicators (KPIs).



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BSBWHS307 Apply knowledge of WHS laws in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.3 Identify and report non-compliance with WHS laws to <i>relevant stakeholders</i> according to organisational policies and procedures	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. consultants, state or territory based regulators) internal stakeholders (e.g. health and safety representatives [HSRs], supervisors, WHSOs). <p>Stakeholders may depend on organisational policies and procedures, industry, state and severity of non-compliance.</p>
3.1 Identify and access <i>sources to keep up to date with WHS laws and WHS-related publications</i> within scope of own role	<p>Sources to keep up to date with WHS laws and WHS-related publications may include:</p> <ul style="list-style-type: none"> industry networks regulatory body publications (e.g. websites, newsletters) Safe Work Australia The OHS Body of Knowledge union publications (e.g. websites, newsletters).
Assessment Conditions	Notes
<i>Guidance materials and alerts</i> issued by the relevant WHS regulator	<p>Guidance materials and alerts may include:</p> <ul style="list-style-type: none"> incident notifications newsletters.



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BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Participate in selecting <i>hazard identification methods</i> for the workplace according to organisational policies and procedures	<p>Hazard identification methods may include:</p> <ul style="list-style-type: none"> • job hazard analysis (JHAs) • job safety analysis (JSAs) • Safe Work Method Statements (SWMS) • site walks.
1.2 Use selected methods to identify, report and record hazards according to organisational policies and procedures, <i>standards</i> and <i>WHS laws</i>	<p>Standards may include:</p> <ul style="list-style-type: none"> • national and international industry standards • Safe Work standards. <p>WHS laws may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
1.3 Provide information and assistance to <i>required personnel</i> during hazard identification process	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • employees • head contractors • investigators • supervisors.
3.2 Identify <i>duty holders</i> according to WHS laws and organisational WHS policies, procedures, processes and systems	<p>Duty holders may include:</p> <ul style="list-style-type: none"> • business directors • designers • manufacturers • officers • PCBUs • supervisors holding relevant licences • workers. <p>Duty holders refers to any person who owes a WHS duty under the WHS Act.</p>
3.3 Participate in selecting <i>risk control options</i> using criteria agreed to by work team, and according to organisational policies, procedures, processes and systems	<p>Risk control options may relate to:</p> <ul style="list-style-type: none"> • risk elimination • risk minimisation (e.g. substituting hazards with a safer alternative, isolating hazards, engineering controls, administrative controls, personal protective equipment [PPE]).
Knowledge Evidence	Notes
<i>Internal and external sources of WHS information and data, and procedures for accessing them</i>	<p>Internal sources of WHS information and data may include:</p> <ul style="list-style-type: none"> • incident data. <p>External sources of WHS information and data may include:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) • industry bodies • SafeWork Australia.



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BSBWHS308 Participate in WHS hazard identification, risk assessment and risk control processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>WHS laws</i> relevant to hazard identification, risk assessment and risk control	WHS laws may include: <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
<i>Workplace equipment and resources</i> required to demonstrate the performance evidence	Workplace equipment and resources may include: <ul style="list-style-type: none"> checklists digital tools (e.g. cameras, computers, mobile devices) organisational policies and procedures templates.



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BSBWHS309 Contribute effectively to WHS communication and consultation processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Contribute to selecting <i>WHS consultation and communication methods</i> aligned to organisational policies and procedures, and compliant with <i>WHS legislative requirements</i>	<p>WHS consultation and communication methods may include:</p> <ul style="list-style-type: none"> formal processes (e.g. agreed organisational consultation mechanisms, toolbox talks, committee meetings) informal processes (e.g. anonymous forms, completing risk assessment forms, posters and signage, safety notice boards, toolbox talks). <p>WHS legislative requirements may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
1.2 Identify and record <i>key stakeholders</i> according to WHS laws and related documentation	<p>Key stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. clients, contractors, industry representatives) internal stakeholders (e.g. employees, PCBUs, safety committees).
2.3 Make suggestions that could assist in removing identified <i>barriers to effective WHS consultation and participation processes</i> , according to organisational policies and procedures	<p>Barriers to effective WHS consultation and participation processes may relate to:</p> <ul style="list-style-type: none"> access and equity bureaucratic structures discrimination ineffective organisational systems, processes and procedures language, literacy and numeracy organisational culture technology.
Foundation Skills	Notes
Reading: Interprets a range of <i>textual information</i> to determine regulatory and procedural requirements, and associated necessary actions	<p>Textual information may include:</p> <ul style="list-style-type: none"> organisational policies and procedures regulatory authority resources and reports state, territory and Commonwealth WHS Acts and Regulations.



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BSBWHS310 Contribute to WHS issue-resolution processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify relevant standards, <i>WHS laws</i> and organisational policies, procedures, processes and systems that apply to the resolution of WHS issues	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
1.2 Review <i>sufficiency of existing issue-resolution processes</i> and compliance with WHS laws and <i>related documentation</i>	<p>Sufficiency of existing issue-resolution processes may relate to:</p> <ul style="list-style-type: none"> compliance with minimum requirements for agreed issue resolution procedures as per relevant jurisdictional legislation duty of care duty to consult.
1.3 Identify <i>participants in the WHS issue-resolution process</i>	<p>Participants in the WHS issue-resolution process may depend on:</p> <ul style="list-style-type: none"> organisational procedures regulatory authority requirements relevant team leaders, line managers and supervisors work health and safety officers (WHSOs).
1.5 Assist with identifying <i>techniques and strategies that can be used to resolve WHS issues</i>	<p>Techniques and strategies that can be used to resolve WHS issues may include:</p> <ul style="list-style-type: none"> collecting insights consultation following reporting processes.
2.5 Seek feedback from <i>required stakeholders</i> to improve WHS issue-resolution processes	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> employees PCBUs regulators relevant team leaders, line managers and supervisors safety committees WHSOs.
3.1 Analyse <i>communication methods</i> to determine most suitable method for distributing outcomes of WHS issue-resolution processes according to organisational policies, procedures, processes and systems	<p>Communication methods may include:</p> <ul style="list-style-type: none"> formal processes (e.g. individual and team meetings, toolbox talks, WHS committee meetings, written summaries) informal processes (e.g. posters and signage, safety notice boards).



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BSBWHS310 Contribute to WHS issue-resolution processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>technology and programs</i> to assist with planning, implementing and tracking progress	Technology and programs to assist with planning, implementing and tracking progress may include: <ul style="list-style-type: none"> cloud-computing sources internal digital tools spreadsheets word processing tools.
Knowledge Evidence	Notes
Sources of WHS information and data, and how to access them	Sources of WHS information and data may include: <ul style="list-style-type: none"> external sources (e.g. Australian Bureau of Statistics [ABS], industry networks and bodies, state, territory and Commonwealth regulators, Safe Work Australia, unions, WHS specialists) internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSMS).



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BSBWHS311 Assist with maintaining workplace safety**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business BSB30420 Certificate III in Library and Information Services BSB40720 Certificate IV in Library and Information Services	BSB30220 Certificate III in Entrepreneurship and New Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Assist with explaining organisational WHS policies, procedures, programs and legislative requirements to <i>required personnel</i>	Required personnel may include: <ul style="list-style-type: none"> contractors and subcontractors individuals involved in site inductions workers.
3.2 Identify <i>strategies and opportunities for developing work team's WHS competence</i> and report to relevant stakeholders	Strategies and opportunities for developing work teams WHS competence may include: <ul style="list-style-type: none"> peer and buddy systems safety committees toolbox talks.
4.1 Identify hazards in the work area and report to <i>relevant stakeholders</i> according to organisational policies and procedures, and WHS legislative requirements	Relevant stakeholders may include: <ul style="list-style-type: none"> employees health and safety representatives (HSRs) regulatory authorities supervisors work health and safety officers (WHSOs).
Foundation Skills	Notes
Reading: Applies appropriate strategies to construct meaning from <i>WHS legislative and organisational documentation</i>	WHS legislative and organisational documentation may include: <ul style="list-style-type: none"> organisational policies and procedures state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.



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BSBWHS331 Participate in identifying and controlling hazardous chemicals**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB30719 Certificate III in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Identify and follow SDSs and other <i>guidance to determine methods to control worker exposure to hazardous chemicals</i>	<p>Guidance to determine methods to control worker exposure to hazardous chemicals may include:</p> <ul style="list-style-type: none"> • labels • incident records • previous risk assessments • regulatory authorities • specialist agencies (e.g. Australian Industrial Chemicals Introduction Scheme [AICIS], European Chemicals Agency [ECHA]) • trade unions and employer associations • WHS agencies and consultants • workplace exposure standards.
3.1 Use <i>WHS laws</i> and guidance notes in relation to hazardous chemicals to identify controls to remove or reduce worker exposure	<p>WHS laws may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth WHS Acts and Regulations.
Knowledge Evidence	Notes
Types of <i>hazard and risk registers</i> , and their key components	<p>Hazard and risk registers may involve using:</p> <ul style="list-style-type: none"> • register, manifest and placard templates.
Requirements of workplace <i>communication processes</i> for sharing information about hazard identification, and risk assessment and control measures	<p>Communication processes may include:</p> <ul style="list-style-type: none"> • privacy and confidentiality requirements • organisational information processes • reporting processes.



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BSBWHS411 Implement and monitor WHS policies, procedures and programs**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40420 Certificate IV in Human Resource Management BSB50320 Diploma of Human Resource Management	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40520 Certificate IV in Leadership and Management BSB40920 Certificate IV in Project Management Practice BSB50520 Diploma of Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Communicate importance of <i>consultation mechanisms</i> in managing WHS risks to work team	<p>Consultation mechanisms may include:</p> <ul style="list-style-type: none"> engagement activities health and safety committee meetings peer collective insights toolbox talks.
5.2 Use <i>aggregate information and data from work area records</i> to meet <i>organisational recordkeeping requirements</i>	<p>Aggregate information and data from work area records may include:</p> <ul style="list-style-type: none"> audit and inspection reports environmental monitoring records and reports hazardous chemical registers and manifests incident reports induction, instructions and training manufacturer and supplier information (e.g. safety data sheets [SDSs]) medical, workers' compensation and rehabilitation reports and records outcomes of collective insights plant and equipment maintenance and testing reports risk registers. <p>Organisational recordkeeping requirements may relate to:</p> <ul style="list-style-type: none"> privacy and confidentiality retention period for different information and data (e.g. asbestos health monitoring records) state, territory and Commonwealth legislative requirements.
Knowledge Evidence	Notes
<i>Procedures for assessing implications of near misses</i> in relation to incidents, injuries and illnesses in the work area	<p>Procedures for assessing implications of near misses may relate to:</p> <ul style="list-style-type: none"> documented and controlled processes investigations.



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BSBWHS412 Assist with workplace compliance with WHS laws**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access current <i>WHS laws</i> and related <i>documentation relevant to organisation's operations</i>	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes. <p>Documentation relevant to an organisation's operations may include:</p> <ul style="list-style-type: none"> benchmarks key performance indicators (KPIs) industry compliance codes organisational policies, procedures, protocols, checklists, templates and codes of practice software requirements.
3.4 Assist with determining related <i>WHS training needs</i> of work team, and with providing the <i>WHS training</i> to meet legislative and organisational requirements	<p>WHS training needs may relate to:</p> <ul style="list-style-type: none"> new worker training (e.g. construction induction training). regular refresher training (e.g. first aid, emergency procedures) role and operation specific training (e.g. safety committee and health and safety representative training, forklift driving, crane operating, manual handling training, confined space entry training, hazardous substances training).
Foundation Skills	Notes
Reading: Reviews and interprets at times <i>complex WHS legislative and organisational texts</i>	<p>Complex WHS organisational texts may include those listed under 'documentation relevant to an organisation's operations' above.</p>
Knowledge Evidence	Notes
Internal and external <i>sources of WHS information</i> , and procedures for accessing them	<p>Sources of WHS information may include:</p> <ul style="list-style-type: none"> external sources (e.g. Australian Bureau of Statistics [ABS], industry networks and bodies, state, territory or Commonwealth regulators, Safe Work Australia, unions, WHS specialists) internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSMS).



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BSBWHS413 Contribute to implementation and maintenance of WHS consultation and participation processes

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Apply knowledge of relevant parts of <i>WHS laws, policies and procedures</i> as they apply to WHS consultation and participation	<p>WHS laws, policies and procedures may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
2.2 Identify <i>required personnel</i> to participate in WHS consultation	<p>Required personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. contractors and subcontractors, customers, clients, suppliers, manufacturers, WHS inspectors and regulators, unions) internal personnel (e.g. employees, health and safety committees, health and safety representatives [HSRs], duty holders, PCBUs, directors).
3.1 Identify <i>consultation and participation processes</i> for communicating and sharing WHS information and data	<p>Consultation and participation processes may relate to:</p> <ul style="list-style-type: none"> formal processes (e.g. health and safety committee meetings with HSRs, reporting procedures, inspection and audit involvement) informal processes (e.g. work team meetings, toolbox talks) privacy and confidentiality legislation, policies and procedures.

Performance Evidence	Notes
Identifying <i>barriers to</i> , and opportunities for improving, <i>effectiveness of WHS consultation and participation processes</i> , and to implement and maintain improvement measures	<p>Barriers to effectiveness of WHS consultation and participation processes may include:</p> <ul style="list-style-type: none"> access and equity bureaucratic structures contractual arrangements discrimination, intimidation or coercion geographic barriers ineffective organisational systems, processes and procedures language, literacy and numeracy organisational culture shift work and rostering technology.

Knowledge Evidence	Notes
Internal and external <i>sources of WHS information and data</i> , and procedures for accessing them	<p>Sources of WHS information and data may include:</p> <ul style="list-style-type: none"> external sources (e.g. Australian Bureau of Statistics [ABS], industry networks and bodies, state, territory or Commonwealth regulators, Safe Work Australia, unions, WHS specialists) internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSMS).



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BSBWHS414 Contribute to WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access and review current <i>WHS laws</i> relevant to organisation's hazard identification and risk control processes	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.2 Access <i>workplace sources of information and data</i> to inform hazard identification, risk assessment and risk controls	<p>Workplace sources of information and data may include:</p> <ul style="list-style-type: none"> audit reports incident and hazard reports legislation manufacturer manuals, specifications and instructions organisational policies, procedures, codes of practice and templates previous risk assessment reviews.
1.3 Access <i>external sources of information and data</i> to inform hazard identification, risk assessment and risk controls	<p>External sources of information and data may include:</p> <ul style="list-style-type: none"> Australian Bureau of Statistics (ABS) booklets and publications from statutory authorities industry networks and bodies Safe Work Australia resources state, territory or Commonwealth regulators unions WHS specialists.
1.5 Confirm information and data with <i>required stakeholders</i> , seeking input from <i>technical and other advisors</i> as required	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> clients team leaders supervisors. <p>Technical and other advisors may include:</p> <ul style="list-style-type: none"> external consultants involved in planning and scheduling.
2.3 Identify <i>duty holders</i> , and their roles and responsibilities according to risk management requirements	<p>Duty holders may include:</p> <ul style="list-style-type: none"> business directors designers manufacturers officers PCBUs supervisors holding relevant licences workers. <p>Duty holders refers to any person who owes a WHS duty under the WHS Act.</p>
2.4 Identify <i>tools</i> used by organisations in current hazard identification and risk control processes	<p>Tools may include:</p> <ul style="list-style-type: none"> risk matrices.
4.2 Contribute to applying tools, techniques and processes to identified hazards to assess risk, according to <i>risk management requirements</i>	<p>Risk management requirements may relate to:</p> <ul style="list-style-type: none"> writing Safe Work Method Statements (SWMS).



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BSBWHS415 Contribute to implementing WHS management systems

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Contribute to identifying <i>elements of WHSMS plan</i> to be implemented relevant to own role	<p>Elements of WHSMS plans may include:</p> <ul style="list-style-type: none"> claims management compliance with legislation key performance indicators (KPIs) policies and procedures (e.g. for monitoring, reporting, feedback, escalation and safety) return to work and rehabilitation management responsibilities in relation to WHSMS plans.
3.2 Contribute to <i>evaluating effectiveness of implemented elements of WHSMS plan</i> and implementation process	<p>Evaluating effectiveness of implemented elements of WHSMS plans may include:</p> <ul style="list-style-type: none"> audits compliance with work health and safety (WHS) legislation and Australian standards (e.g. AS/ANZ ISO 45001:2018) incident investigations maintenance of records and data risk control monitors worker health surveillance.
3.4 Document and distribute adjusted plan to <i>required personnel</i> according to organisational policies and procedures	<p>Required personnel may include:</p> <ul style="list-style-type: none"> employees duty holders team leaders supervisors.
Foundation Skills	Notes
Reading: Locates, reviews and interprets WHS laws and <i>organisational texts</i>	<p>Organisational texts may include:</p> <ul style="list-style-type: none"> benchmarks KPIs organisational policies, procedures, protocols, checklists, templates and codes of practice software requirements and user guides.
Knowledge Evidence	Notes
Tools, methods and processes for implementing and <i>reviewing WHSMS plan</i> , including consultation with required personnel	<p>Reviewing WHSMS plans may relate to:</p> <ul style="list-style-type: none"> audits investigations maintenance of records and data.
<i>Regulatory authority WHSMS tools, standards, guidance material and procedures</i> required to contribute to implementing WHS management systems	<p>Regulatory authority WHSMS tools, standards, guidance material and procedures may be found at:</p> <ul style="list-style-type: none"> Safe Work Australia state and territory regulatory authority websites.



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BSBWHS416 Contribute to workplace incident response

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>duty holders</i> and <i>WHS legislative requirements for incident response</i>	<p>Duty holders may include:</p> <ul style="list-style-type: none"> • business directors • designers • manufacturers • officers • PCBUs • supervisors holding relevant licences • workers. <p>Duty holders refers to any person who owes a work health and safety (WHS) duty under the WHS Act.</p> <p>WHS legislative requirements for incident response may include:</p> <ul style="list-style-type: none"> • compliance with a non-disturbance notice • notification of notifiable incidents • preservation of the incident site • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.3 Communicate requirements for responding to incident to <i>required personnel</i> within scope of own role and work area	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • employees • duty holders • team leaders • supervisors.
1.4 Contribute to developing <i>communication mechanisms</i> to notify manager of incident	<p>Communication mechanisms may relate to:</p> <ul style="list-style-type: none"> • selecting appropriate communication channels.
2.4 Assist with reporting incident to <i>external authorities</i> , according to legislative requirements and workplace procedures and processes	<p>External authorities may include:</p> <ul style="list-style-type: none"> • contractors and subcontractors • industry networks (e.g. peak bodies and associations) • state and territory regulators • unions • WHS inspectors.
3.1 Assist with obtaining <i>information and data from those involved</i> about actions and events leading up to, during and after an incident, using <i>appropriate data collection techniques</i>	<p>Information and data from those involved may include:</p> <ul style="list-style-type: none"> • evidence • maintenance reports • shift and rostering information • witness statements.



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BSBWHS416 Contribute to workplace incident response**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB41419 Certificate IV in Work Health and Safety	BSB30719 Certificate III in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Assist with identifying and accessing <i>sources of additional information and data</i> related to incident	<p>Sources of additional information and data may include:</p> <ul style="list-style-type: none"> external information and data (e.g. industry wide hazard alerts, legislation, manufacturer and supplier information, regulations, prosecution summaries) internal information and data (e.g. audit reports, incident and hazard reports and statistics, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, risk assessment reviews, safety data sheets [SDSs], security footage).
Knowledge Evidence	Notes
Sources of <i>internal and external WHS information and data</i> relating to incidents, and procedures for accessing them	<p>Internal and external WHS information and data may include:</p> <ul style="list-style-type: none"> as listed under 'sources of additional information and data' above annual statistical reports (e.g. Work-related Traumatic Fatalities report) Australian Bureau of Statistics (ABS) national data collections (e.g. National Data Set for Compensation-based Statistics, Work-related Traumatic Injury Fatalities collection, Comparative Performance Monitoring program).



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BSBWHS417 Assist with managing WHS implications of return to work**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>legislative requirements</i> for facilitating injured worker's return to work	Legislative requirements may include: <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.3 Identify relevant <i>organisational policies and requirements</i> for injured worker's return to work	Organisational policies and requirements may relate to: <ul style="list-style-type: none"> communication consultation hazard identification privacy and confidentiality organisational culture, values and mission statements National Return to Work Strategy risk assessment and control measures workers' compensation.
2.2 Identify potential barriers for worker returning to work, in consultation with <i>relevant parties</i>	Relevant parties may include: <ul style="list-style-type: none"> external parties (e.g. allied health professional, medical practitioner, mental health professional, rehabilitation case manager) internal parties (e.g. PCBUs, return-to-work manager, senior management, supervisors, owners, officers).
Knowledge Evidence	Notes
<i>Methods, techniques and tools to support workers</i> involved in return to work	Methods, techniques and tools to support workers may include: <ul style="list-style-type: none"> alternative duties continuous communication cadence between relevant parties provision of required workplace aids, equipment or measures training and development.
Assessment Conditions	Notes
<i>Workplace documentation and WHS data</i> required to demonstrate the performance evidence	Workplace documentation and WHS data may include: <ul style="list-style-type: none"> medical reports.



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BSBWHS418 Assist with managing WHS compliance of contractors

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and review <i>organisational documentation</i> and <i>WHS legislative requirements</i> applicable to contractor	<p>Organisational documentation may include:</p> <ul style="list-style-type: none"> • Safe Work Method Statements (SWMS) • sub-contractor packs. <p>WHS legislative requirements may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.3 Identify and review, within scope of own role, <i>contractor-specific WHS compliance requirements</i>	<p>Contractor-specific WHS compliance requirements may include:</p> <ul style="list-style-type: none"> • induction processes • site registration procedures • site-specific risk assessment • SWMS.
2.1 Provide contractor with access to <i>relevant WHS documentation</i>	<p>Relevant WHS documentation may include:</p> <ul style="list-style-type: none"> • documentation requested in an RFI (Request for Information) • sub-contractor pack.
4.2 Consult with contractor and <i>required personnel</i> to assist with addressing areas of contractor WHS non-compliance	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • external personnel (e.g. contractors and subcontractors) • internal personnel (e.g. senior management, supervisors, owners, officers).
Foundation Skills	Notes
Reading: Interprets and analyses legal and <i>organisational texts</i> relevant to contractor WHS requirements	<p>Organisational texts may include:</p> <ul style="list-style-type: none"> • documents relating to organisational duty of care and breach of duty • internal safety management plan • site management plan.
Knowledge Evidence	Notes
Internal and <i>external sources of information and data</i> relevant to <i>contractor WHS arrangements</i> , and procedures for accessing them	<p>External sources of information and data relevant to contractor WHS arrangements may include:</p> <ul style="list-style-type: none"> • OHS Body of Knowledge • organisational and industry codes of practice • Safe Work Australia and relevant jurisdictional WHS authorities.
<i>Duties, rights and obligations of individuals and parties</i> as specified in relevant WHS laws with regard to supply of services by contractors	<p>Duties, rights and obligations of individuals and parties may include:</p> <ul style="list-style-type: none"> • duties of contractors according to state and territory legislation • ethical responsibility.



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BSBWHS419 Contribute to implementing WHS monitoring processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Consult with <i>relevant individuals and/or parties</i> to identify agents and/or conditions to be measured, according to organisational policies and procedures	<p>Relevant individuals and/or parties may include:</p> <ul style="list-style-type: none"> external individuals and/or parties (e.g. contractors and subcontractors, regulatory authorities, inspectors, WHS specialists) internal individuals and/or parties (e.g. duty holders, PCBUs, workers, WHS committees, health and safety representatives [HSRs]).
1.3 Identify <i>characteristics of agents and/or conditions</i> to be monitored	<p>Characteristics of agents and/or conditions may include:</p> <ul style="list-style-type: none"> absorption by and effect on specific parts of the body dose factors relating to concentration and time environmental behaviour, including over distance and time work environments (e.g. confined spaces, manual handling). <p>Agents and/or conditions may include:</p> <ul style="list-style-type: none"> biological agents (e.g. insects, mites, bacteria, infectious matter) electricity environmental agents (e.g. temperature, light, noise) fibres, dusts and particulates fumes, mists, gases and vapours radiation.
2.1 Determine <i>sampling process</i> for data collection	<p>Sampling processes may include:</p> <ul style="list-style-type: none"> internal and external audit sampling calculations investigations percentage samples surveys.
3.3 Use <i>equipment to conduct sampling</i> according to legislative requirements	<p>Equipment to conduct sampling may include:</p> <ul style="list-style-type: none"> online survey software spreadsheets. <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> privacy and confidentiality security legislation relevant to data collection and storage.
5.3 Ensure that results and records are retained in an easily <i>retrievable format</i> according to WHS laws, and organisational policies and procedures	<p>Retrievable formats may include:</p> <ul style="list-style-type: none"> easily accessible and auditable electronic records (e.g. cloud-based storage) retrievable with appropriate security in place.



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BSBWHS419 Contribute to implementing WHS monitoring processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses familiar <i>digital systems and tools</i> to access, organise, analyse and display information relevant to role	Digital systems and tools may include: <ul style="list-style-type: none"> • commercial software and tools (e.g. bowtie analysis software, risk assessment tools) • company specific apps/software • databases • internal drives • intranets • mobile devices and applications • presentation tools • spreadsheets • virtual meeting technology • websites • WHSIS • word processing tools.
Performance Evidence	Notes
Identify <i>regulatory requirements and standards</i> that apply to monitoring physical agents and/or conditions relevant to WHS	Regulatory requirements and standards may relate to: <ul style="list-style-type: none"> • compliance codes • exposure standards • state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
Knowledge Evidence	Notes
Internal and external <i>sources of WHS information and data</i>	Sources of WHS information and data may include: <ul style="list-style-type: none"> • external sources (e.g. industry networks and bodies, state, territory or Commonwealth regulators, national injury statistics, Safe Work Australia, unions, WHS specialists) • internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSMS).



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BSBWHS431 Develop processes and procedures for controlling hazardous chemicals in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB41419 Certificate IV in Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and source current <i>WHS laws</i> , and <i>organisational policies and procedures relating to controlling hazardous chemicals</i>	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations. <p>Organisational policies and procedures relating to controlling hazardous chemicals may relate to:</p> <ul style="list-style-type: none"> industry and regulator codes of practice and compliance codes incident response procedures health monitoring labelling and classification registers and manifests of hazardous chemicals training and development transportation of chemicals workplace exposure standards for chemicals.
1.4 Use safety data sheets (SDSs) and <i>other guidance to determine potential worker exposure to identified hazardous chemicals</i>	<p>Other guidance to determine potential worker exposure to identified hazardous chemicals may include:</p> <ul style="list-style-type: none"> labels incident records previous risk assessments regulatory authorities specialist agencies (e.g. Australian Industrial Chemicals Introduction Scheme [AICIS], European Chemicals Agency [ECHA]) trade unions and employer associations WHS agencies and consultants workplace exposure standards.
2.4 Seek and integrate feedback from <i>required personnel</i> about developed processes and procedures	<p>Required personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. specialist agencies as mentioned above, regulatory authorities, inspectors, unions) internal personnel (e.g. health and safety representatives [HSRs], managers, supervisors, workers).



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BSBWHS504 Manage WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>sources of information and data</i>	<p>Sources of information and data may include:</p> <ul style="list-style-type: none"> external sources (e.g. industry networks and bodies, state, territory or Commonwealth regulators, national injury statistics, Safe Work Australia, unions, WHS specialists) internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSMS).
1.2 Obtain <i>information and data to determine the nature and scope of hazards, the range of harms they may cause, and how these harms are caused</i>	<p>Obtaining information and data may relate to:</p> <ul style="list-style-type: none"> extracting information and data from WHSMS researching using online sources. <p>Information and data to determine that nature, scope, range and cause of hazards may include:</p> <ul style="list-style-type: none"> external information and data (e.g. acts, codes of practice, industry reports, industry wide hazard alerts, legislation, manufacturer and supplier information, regulations, prosecution summaries) internal information and data (e.g. audit reports, incident and hazard reports and statistics, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, previous assessments, risk assessment reviews, safety data sheets [SDSs]).
1.3 Obtain <i>information and data to determine techniques, tools and processes to assess risk associated with identified hazards, and identify risk control options</i>	<p>Information and data to determine technologies, tools and processes to assess risk may include:</p> <ul style="list-style-type: none"> codes of practice for specific high risk situations (e.g. manual handling or confined spaces) internal risk management policy legislative information regarding hierarchy of controls relevant standards (e.g. ISO 31000). <p>Techniques, tools and processes may include:</p> <ul style="list-style-type: none"> consultations hierarchy of controls peer observations plant registers pre-start checks risk matrices safe work method statements (SWMS) toolbox talks workplace inspection checklists.



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BSBWHS504 Manage WHS risks

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Apply <i>knowledge of the organisation's WHSMS and WHSIS</i> to identify WHS risk management requirements	<p>Knowledge of the organisation's WHSMS and WHSIS may include:</p> <ul style="list-style-type: none"> elements of systems that may help identify WHS risk requirements (e.g. procedures, templates, reporting, statistics) relevant standards for systems (ISO 45001, 31000).
Foundation Skills	Notes
Get the work done: Uses common <i>digital systems and tools</i> to locate and store information	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> commercial software databases internal drives intranets mobile devices and applications websites WHSIS.
Knowledge Evidence	Notes
Identify <i>formal and informal communication and consultation processes</i> and key personnel related to communication	<p>Formal communication and consultation processes may include:</p> <ul style="list-style-type: none"> agreed consultation mechanisms (e.g. safety as an agenda item at safety committee meetings) toolbox talks work health and safety (WHS) committee meetings. <p>Informal communication and consultation processes may include:</p> <ul style="list-style-type: none"> anonymous forms posters and signage risk assessment forms safety notice boards toolbox talks.
List <i>other functional areas that impact on the management of WHS</i>	<p>Other functional areas that impact on the management of WHS may include:</p> <ul style="list-style-type: none"> finance human resources and industrial relations (HRIR) legal operations purchasing and procurement quality sustainability workers' compensation.



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BSBWHS504 Manage WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Outline the <i>principles</i> and practices of a <i>systematic approach to managing WHS</i>	<p>The principles of a systematic approach may relate to managing WHS that is:</p> <ul style="list-style-type: none"> • adherent to legislative principles • documented • easily-followed • organised • repeatable • structured.
Assessment Conditions	Notes
<i>Relevant Acts, regulations, codes of practice, standards and guidelines relating to risks found in the workplace</i>	<p>Relevant Acts and regulations may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth WHS Acts and Regulations. <p>Codes of practice may also relate to compliance codes.</p>



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BSBWHS512 Contribute to managing work-related psychological health and safety

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review and analyse <i>legislative requirements applicable to psychological health and safety</i>	<p>Legislative requirements applicable to psychological health and safety may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • criminal legislation • Fair Work Act 2009 • Privacy Act 1998 • state, territory and Commonwealth work health and safety (WHS) Acts and Regulations, highlighting the duties, requirements and responsibilities of PCBUs, officers, workers and others in the workplace in relation to psychosocial health and safety.
1.2 Determine <i>workplace responsibilities relating to psychological health and safety</i>	<p>Workplace responsibilities relating to psychological health and safety may depend on:</p> <ul style="list-style-type: none"> • the individual, their role and their duties within the workplace.
2.2 Access and store information, data and advice to assist with <i>identifying work-related psychosocial hazards</i> according to legislative requirements	<p>Accessing and storage of information, data and advice to assist with identifying work-related psychosocial hazards may relate to:</p> <ul style="list-style-type: none"> • privacy and confidentiality (e.g. Privacy Act 1998) • recordkeeping requirements.
4.1 Contribute to determining required <i>risk controls</i> for identified work-related psychosocial hazards according to the hierarchy of control measures	<p>Risk controls may include:</p> <ul style="list-style-type: none"> • administrative risk controls • personal protective equipment (PPE) (e.g. hearing protection to reduce noise stress from loud noises) • risk elimination (e.g. removing excessive work demands) • risk minimisation (e.g. increased support during forecasted peak periods).
Foundation Skills	Notes
Interprets and critically analyses <i>texts</i> when contributing to work-related psychological health and safety	<p>Texts may include:</p> <ul style="list-style-type: none"> • legislation • medical reports • organisational policies and procedures.
Performance Evidence	Notes
<i>Evaluate effectiveness of existing risk controls</i> and document areas for their improvement, identifying when a review of risk controls is needed.	<p>Effectiveness of existing risk controls may be evaluated through:</p> <ul style="list-style-type: none"> • adaptability to workplace change • consultation • hazard or risk identification • health and safety representative [HSR] review.



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BSBWHS513 Lead WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and review internal and external <i>sources of WHS information and data</i> that apply to risk management processes	<p>Sources of WHS information and data may include:</p> <ul style="list-style-type: none"> external sources (e.g. compliance codes, industry networks and bodies, state, territory or Commonwealth regulators, national injury and incident statistics, Safe Work Australia, unions, WHS specialists) internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, internal risk management policies, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSIS, WHSMS).
1.2 Identify <i>legislative requirements</i> for WHS risk management	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations.
1.3 Identify <i>duty holders</i> , individuals and/or parties to consult about and participate in risk management processes, according to organisational and legislative requirements	<p>Duty holders may include:</p> <ul style="list-style-type: none"> business directors designers manufacturers officers PCBUs supervisors holding relevant licences workers. <p>Duty holders refers to any person who owes a work health and safety (WHS) duty under the WHS Act.</p>
2.5 Communicate outcomes of risk assessment to <i>required personnel</i> according to <i>organisational and legislative requirements</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> contractors and subcontractors employees / workers senior management regulators suppliers unions. <p>Organisational and legislative requirements may relate to:</p> <ul style="list-style-type: none"> industry association or union guidelines organisational communication policies privacy and confidentiality (e.g. Privacy Act 1988) regulator requirements.
3.3 Plan to implement selected <i>risk controls</i> according to organisation's <i>WHS management system (WHMS)</i> and <i>WHS information system (WHSIS)</i>	<p>Risk controls in an organisation's WHSMS and WHSIS may include:</p> <ul style="list-style-type: none"> action plans automatic notification and escalation systems manual notification and escalation systems.



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BSBWHS513 Lead WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.2 <i>Review effectiveness of implemented risk management process</i> according to organisation's WHSMS and legislative requirements	Reviewing effectiveness of an implemented risk management process may include: <ul style="list-style-type: none"> analysis of relevant statistics and information (e.g. reviewing trends in injury statistics) internal consultation reviewing risk registers reviewing alignment and compliance with state, territory and Commonwealth work health and safety (WHS) Acts and Regulations, as well as relevant Australian Standards relevant to risk management.
Foundation Skills	Notes
Uses a range of <i>digitally-based technology</i> and applications to access, organise and share relevant information in effective ways	Digitally-based technology may include: <ul style="list-style-type: none"> commercial software database systems internal drives intranets mobile devices and applications virtual collaboration tools websites.
Performance Evidence	Notes
Review WHS risk-management process according to established scope and <i>key performance indicators</i>	Key performance indicators may relate to: <ul style="list-style-type: none"> attendance engagement positive performance indicators measurable indicators repeatable indicators.
Knowledge Evidence	Notes
<i>Key components of effective consultation and participation strategies</i>	Key components of effective consultation and participation strategies may include: <ul style="list-style-type: none"> compliance with relevant legislation, regulations and Australian Standards collaborative approaches closing feedback loops generating a positive safety culture individual empowerment involvement of key stakeholders (e.g. health and safety representatives [HSRs]).
<i>Principles of decision-making</i>	Principles of decision-making may relate to: <ul style="list-style-type: none"> organisational and industry codes of practice.



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BSBWHS514 Manage WHS compliance of contractors**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Analyse scope of contractor services and applicable <i>WHS legislative and organisational requirements</i>	<p>WHS legislative requirements may relate to:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes. <p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> industry and regulator codes of practice and compliance codes incident response procedures health monitoring registers and manifests training and development Safe Work Method Statements (SWMS) sub-contractor packs.
1.3 Establish <i>WHS key performance indicators (KPIs) relating to contracted services</i> according to organisational policies and procedure	<p>Establishing WHS key performance indicators (KPIs) relating to contracted services, may include:</p> <ul style="list-style-type: none"> consultation incident reporting pre-checks of contractors those outlined in tender documents.
Foundation Skills	Notes
Reading: Interprets and analyses legal and <i>organisational texts</i> relevant to contractor WHS arrangements	<p>Organisational texts may include:</p> <ul style="list-style-type: none"> contracts legislation requirements, including those across different geographical locations and jurisdictions as required (e.g. differences between Commonwealth and state mining legislation) tender documents.
Knowledge Evidence	Notes
Procedures and protocols for establishing WHS-related <i>lead and lag key performance indicators (KPIs)</i> , and measuring contractor performance against them	<p>Lead KPIs may include:</p> <ul style="list-style-type: none"> risk assessment consultation rates. <p>Lag KPIs may include:</p> <ul style="list-style-type: none"> incident statistic rates.



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BSBWHS515 Lead initial response to and investigate WHS incidents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Implement initial response according to plan, and <i>organisational and legislative requirements</i>	<p>Organisational and legislative requirements may relate to:</p> <ul style="list-style-type: none"> communication policies (e.g. ensuring all workers understand WHS responsibilities) notifiable incidents (e.g. injuries, illnesses) state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
2.3 Identify, document and secure required human and <i>other resources</i> appropriate to nature and scope of incident, including expert advice as required	<p>Other resources may include:</p> <ul style="list-style-type: none"> emergency response / management plans emergency control organisations (ECO) incident management procedures scene preservation materials (e.g. tape, personal protective equipment [PPE], barriers, security cameras). <p>Expert advice may be required for situations beyond capability of own understanding. This may include:</p> <ul style="list-style-type: none"> emergency services state or territory regulators.
2.4 Ensure participation of, and consultation with, <i>required stakeholders</i> , and determine agreed processes for investigation	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. emergency services, external inspectors, stakeholders required beyond dealing with an incident onsite such as a nominated treating doctor, physiotherapist, psychologist or trauma counsellor). internal stakeholders (e.g. supervisors, team members, employees, witnesses, WHS managers). <p>Incident management procedure may be undertaken with an associated investigation team.</p>
2.5 Identify, address and document potential <i>barriers</i> to investigation according to organisational requirements	<p>Barriers to investigation may include:</p> <ul style="list-style-type: none"> access to medical treatment and facilities availability of resources, information and data cultural barriers geographical issues (e.g. multi-site managers) lack of reporting on near misses legal limitations organisational, political or community stakeholder sensitivity perceived or real threats privacy and confidentiality scene preservation (as required by legislation) unfamiliarity with processes witness availability and reliability (e.g. integrity and memory).



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BSBWHS515 Lead initial response to and investigate WHS incidents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Identify and access relevant and reliable <i>sources of incident information and data</i> according to organisational policies and protocols, suitable causation model and legislative requirements	<p>Sources of incident information and data may include:</p> <ul style="list-style-type: none"> external sources (e.g. compliance codes, causation models, industry networks and bodies, state, territory or Commonwealth regulators, national injury and incident statistics, Safe Work Australia, unions, The OHS Body of Knowledge [OHS BoK] WHS specialists) internal sources (e.g. audit reports, chemical manifests, incident and hazard reports, incident risk registers, register or injuries, internal risk management policies, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, risk assessment reviews, WHSIS, WHSMS).
3.2 Inspect incident site, equipment and other <i>evidence</i> according to investigation plan, organisational procedures and <i>legislative requirements</i>	<p>Evidence may include:</p> <ul style="list-style-type: none"> organisational checklists photographic evidence plant maintenance records risk assessment documents rosters and training records toolbox talks video evidence witness statements. <p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> high risk licencing scene preservation requirements.
3.3 <i>Present collected information and data</i> in required <i>format</i>	<p>Format for presenting collected information and data may relate to templates found on the Safe Work Australia website.</p>
5.3 Implement organisational and <i>WHS legislative recordkeeping protocols and procedures</i> in relation to investigation report	<p>WHS legislative recordkeeping protocols and procedures may include:</p> <ul style="list-style-type: none"> key headings required in record keeping standards for classifying and recording incidents time periods required for record keeping according to both legislation and organisational policies and procedures (e.g. notifiable incidents, register of injuries, individual medical records, asbestos).
5.4 Communicate report to required <i>individuals and/or parties</i> according to organisational policies and procedures	<p>Individuals and/or parties may include:</p> <ul style="list-style-type: none"> those directly impacted by the matter (e.g. those in the work area or relevant managers). <p>Report communication may need to consider privacy of relevant individuals and/or parties as per organisational policies and procedures.</p>



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BSBWHS515 Lead initial response to and investigate WHS incidents**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Analyses reports and <i>other material</i> to determine required course of action	<p>Other material may include:</p> <ul style="list-style-type: none"> • compensation claims data • first aid data • incident reports • injury reports • risk assessments • training records and data • witness statements (e.g. to determine a timeline of events) • WHS consultation and participation records.
Identifies and uses <i>appropriate conventions and protocols</i> when communicating with parties involved in various investigation stages	<p>Appropriate conventions and protocols may include:</p> <ul style="list-style-type: none"> • privacy and confidentiality protocols • use of agreed methods of consultation.
Uses <i>digital systems and tools</i> for data collection and analysis, and communication and reporting	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • commercial software • database systems • internal drives • intranets • mobile devices and applications • presentation software • virtual collaboration tools • websites.
Knowledge Evidence	Notes
<i>Information and data collection procedures</i> that ensure their validity, admissibility and accuracy	<p>Information and data collection procedures may include:</p> <ul style="list-style-type: none"> • legislative considerations: <ul style="list-style-type: none"> ◦ Evidence Act 1995 ◦ Surveillance Devices Act 2004 ◦ Safe Work Australia notifiable incident fact sheet • rights of individuals to include third parties if required • seeking permission to record witness statements • types and lines of questioning used (e.g. not using closed or directive questions) • witness statements (PDF controlled if typed). <p>Collection procedures may include evidence storage and organisational requirements for any future potential legal actions.</p>
Common <i>industry-accepted causation models</i> , and their use in informing data collection and analysis	<p>Industry-accepted causation models may include:</p> <ul style="list-style-type: none"> • 5 whys • fishbone diagram • incident cause analysis method (ICAM).



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BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access and analyse <i>sources of information</i> to determine required form, content, purposes and functions of WHSMS	<p>Sources of information may include:</p> <ul style="list-style-type: none"> • employer associations • industry associations • regulatory authorities • relevant international and Australian standards (e.g. AS/NZS ISO 45001:2018) • state government authorities • WHS-specific resources (e.g. Safe Work Australia, The OHS Body of Knowledge) • WHS specialists.
1.2 Identify <i>duty holders</i> and their roles and responsibilities in WHSMS, according to WHS laws	<p>Duty holders may include:</p> <ul style="list-style-type: none"> • business directors • designers • manufacturers • officers • PCBUs • supervisors holding relevant licences • workers. <p>Duty holders refers to any person who owes a work health and safety (WHS) duty under the WHS Act.</p>
1.3 Document organisational WHSMS that meets <i>legal and organisational requirements</i>	<p>Legal and organisational requirements may relate to:</p> <ul style="list-style-type: none"> • consultation • industry-specific WHSMS legislative requirements (e.g. construction and mining industries) • record-keeping • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.4 Consult with <i>individuals and parties</i> about what the WHSMS should include and integrate their feedback as required	<p>Individuals and parties may include:</p> <ul style="list-style-type: none"> • auditors and creditors • contract workers • duty holders • external consultants • health and safety representatives (HSRs) • PCBUs • regulatory authorities • WHS committee.
2.3 Contribute to <i>developing draft plan</i> according to organisational policies and procedures	<p>Development of draft plan may include:</p> <ul style="list-style-type: none"> • key performance indicators (KPIs) • implementation plans • reference to audit standards and tools for system management.



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BSBWHS516 Contribute to developing, implementing and maintaining an organisation's WHS management system

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Uses <i>digital systems and tools</i> in the context of plan implementation and measurement, and evaluation of WHS performance	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • commercial software • database systems • internal drives • intranets • mobile devices and applications • presentation software • virtual collaboration tools • websites.



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BSBWHS517 Contribute to managing a WHS information system**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety\
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access sources of WHS information and data according to organisational policies and procedures	<p>Sources of WHS information and data may include:</p> <ul style="list-style-type: none"> • employer associations • industry associations • internal registers, manifests and records (e.g. plant maintenance records, safety data sheets [SDSs]) • regulatory authorities • relevant international and Australian standards for health and safety management (e.g. AS/NZS ISO 45001:2018) • state government authorities • WHS-specific resources (e.g. Safe Work Australia, The OHS Body of Knowledge) • WHS specialists. <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • communication policies (e.g. ensuring all workers understand WHS responsibilities) • industry codes of practice and compliance codes (e.g. manual handling) • notifiable incidents (e.g. injuries, illnesses) • record-keeping • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes. <p>Sources of information and data may vary depending on organisation size.</p>
1.3 Meet legislative requirements for reporting to external bodies within required timeframes	<p>Legislative requirements for reporting to external bodies may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes, particularly relating to: <ul style="list-style-type: none"> ○ monitoring of and exposure to specific hazards ○ notifiable incident ○ privacy ○ workers' compensation.
2.2 Identify training and development needs of WHSIS users, and take action as required to facilitate the required training within scope of own role	<p>Training and development needs may include skills required to create and update:</p> <ul style="list-style-type: none"> • advanced templates • complex documents • complex spreadsheets.



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BSBWHS517 Contribute to managing a WHS information system

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety\
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Plans, organises and implements tasks required to operate the WHSIS, using a range of <i>technology and software systems</i>	<p>Technology and software systems may include:</p> <ul style="list-style-type: none"> • commercial software (e.g. Pegasus, QuickSafe) • customised organisational systems • database systems • internal drives • intranets • presentation software • virtual collaboration tools • websites.
Performance Evidence	Notes
Contribute to identifying and implementing an improvement measure for a WHSIS based on analysis of information and data, and communicate measures to <i>required personnel</i> according to WHS legislative and organisational requirements.	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • contractors and subcontractors • duty holders • PCBUs • WHS inspectors • workers.



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BSBWHS518 Manage WHS hazards associated with maintenance and use of plant**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety\
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access <i>sources of WHS information, data and advice</i> relating to items of workplace plant	<p>Sources of WHS information and data may include:</p> <ul style="list-style-type: none"> • compliance codes • employer associations • industry associations • internal registers, manifests and records (e.g. plant maintenance records, safety data sheets [SDSs]) • local governments • manufacturer or supplier manuals • regulatory authorities • relevant international and Australian standards relevant to type of Plant (inclusive of mobile plant, tools and equipment) • state government authorities • unions • WHS-specific resources (e.g. Safe Work Australia, The OHS Body of Knowledge) • WHS specialists.
1.2 Inspect items of plant and identify how they are to be used, according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • communication policies (e.g. ensuring all workers understand WHS responsibilities, communicating across multiple languages) • industry codes of practice and compliance codes (e.g. manual handling) • notifiable incidents (e.g. injuries, illnesses) • record-keeping • reporting • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
1.4 Consult with <i>others</i> to confirm hazard identification	<p>Others may include:</p> <ul style="list-style-type: none"> • government authorities (e.g. The Department of Health) • manufacturers • professional associations (e.g. Australian Institute of Health & Safety [AIHS], Human Factors and Ergonomics Society of Australia [HFESA], The Australian Institute of Occupational Hygienists [AOIH], Australian and New Zealand Society of Occupational Medicine [ANZOM]) • suppliers • regulatory authorities.
3.3 Consult with, and report to, <i>required internal and specialist personnel</i> in relation to risk controls to be implemented	<p>Required internal personnel may include:</p> <ul style="list-style-type: none"> • contractors or subcontractors • duty holders <p>Specialist personnel may include those listed under 'others' above.</p>



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BSBWHS518 Manage WHS hazards associated with maintenance and use of plant**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.4 Communicate <i>rights, obligations and duties of workplace personnel</i> in relation to identified hazards and risk controls associated with plant	<p>Rights, obligations and duties of workplace personnel may depend on:</p> <ul style="list-style-type: none"> industry-specific peak bodies and advisory panels state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes, as they relate to duty holders.
4.4 Communicate <i>registration, licensing and certification requirements</i> to required personnel	<p>Registration, licensing and certification requirements may relate to:</p> <ul style="list-style-type: none"> licencing and certification categories (e.g. high risk licencing) regulatory authority resources.
Knowledge Evidence	Notes
<i>High-risk work licences</i> required for specific plant	<p>High-risk work licences may vary depending on the regulatory authority and jurisdiction, examples may be found at Safe Work Australia.</p>



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BSBWHS519 Lead the development and use of WHS risk management tools**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Apply knowledge of <i>risk management tools</i> to address requirements of WHS laws and workplace	Risk management tools may include: <ul style="list-style-type: none"> • checklists • risk registers • job safety analysis (JSAs) • root cause analysis • Safe Work Method Statements (SWMS).
1.2 Consult with <i>required personnel</i> about selecting suitable risk management tools	Required personnel may include: <ul style="list-style-type: none"> • external stakeholders (e.g. WHS specialists, regulatory authorities, contractors or subcontractors) • internal stakeholders (e.g. health and safety representatives [HSRs], PCBUs, health and safety committees).
Foundation Skills	Notes
Get the work done: Uses <i>technology and digital systems</i> and tools effectively	Technology and software systems may include: <ul style="list-style-type: none"> • commercial WHSIS software (e.g. Pegasus, QuickSafe) • customised organisational systems • database systems • internal drives • intranets • presentation software • virtual collaboration tools • websites.
Knowledge Evidence	Notes
<i>WHS laws and other instruments issued by WHS regulators</i> relating to the performance evidence, and procedures for applying them	WHS laws and other instruments issued by WHS regulators may include: <ul style="list-style-type: none"> • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.
Assessment Conditions	Notes
<i>Sources of information, data and advice</i> in relation to WHS risk management tools	Sources of information, data and advice may include: <ul style="list-style-type: none"> • compliance codes • employer associations • industry associations • internal registers, manifests and records • local governments • regulatory authorities • relevant international and Australian standards • state government authorities • unions • WHS-specific resources (e.g. Safe Work Australia, The OHS Body of Knowledge) • WHS specialists.



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BSBWHS520 Manage implementation of emergency procedures**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety\
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Apply knowledge of <i>WHS hazards and relevant standards</i> to identify possible causes of potential emergencies	<p>WHS hazards and relevant standards may include:</p> <ul style="list-style-type: none"> • biological (e.g. infectious diseases) • chemical • environmental (including those that may impact relevant communities) • electrical • physical (e.g. noise, injury, violence, hazardous manual tasks) • Plant or equipment • psychological. <p>Relevant standards may include:</p> <ul style="list-style-type: none"> • Australian standards • industry-specific standards • international standards.
1.3 Identify and liaise with <i>appropriate specialist advisers and emergency services and/or specialist response teams</i> to identify possible causes of potential emergencies	<p>Appropriate specialist advisers and emergency services and/or specialist response teams may include:</p> <ul style="list-style-type: none"> • chemicals specialists • emergency services (e.g. emergency medical response, police, Hazmat specialists) • engineering specialists • regulatory authorities • security specialists.
Foundation Skills	Notes
Navigate the world of work: Identifies <i>legal rights and responsibilities of self and others</i> in relation to emergency response contexts	<p>Legal rights and responsibilities of self and others may depend on:</p> <ul style="list-style-type: none"> • industry-specific peak bodies and advisory panels • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes, as they relate to duty holders.



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BSBWHS521 Ensure a safe workplace for a work area**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Work with <i>required personnel</i> to set up and maintain consultative arrangements according to required WHS laws	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • duty holders • regulatory authorities • WHS inspectors.
3.3 Develop and maintain <i>procedures for selecting and implementing risk controls</i> according to the hierarchy of control measures and <i>WHS legislative requirements</i>	<p>Procedures for selecting and implementing risk controls may include consultation with:</p> <ul style="list-style-type: none"> • employees • health and safety representatives (HSRs) • regulatory authorities. <p>Risk controls may include:</p> <ul style="list-style-type: none"> • administrative risk controls • personal protective equipment (PPE) (e.g. hearing protection to reduce noise stress from loud noises) • risk elimination (e.g. removing excessive work demands) • risk minimisation (e.g. increased support during forecasted peak periods).
4.2 Use a <i>system for WHS recordkeeping</i> to allow identification of patterns of occupational injury and disease in the organisation, and to maintain a record of WHS decisions made, including reasons for decisions	<p>Systems for WHS recordkeeping may relate to:</p> <ul style="list-style-type: none"> • audit and inspection reports • consultation • internal records (e.g. medical, worker compensation, environmental monitoring) • legislative recordkeeping requirements • registers and manifests (e.g. hazardous chemicals) • reports (e.g. audit, inspection, Plant maintenance).
Foundation Skills	Notes
Uses <i>digital systems and tools</i> to enter, store and retrieve relevant information	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • commercial WHSIS software (e.g. Pegasus, QuickSafe) • customised organisational systems • database systems • internal drives • intranets • presentation software • virtual collaboration tools • websites.



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BSBWHS521 Ensure a safe workplace for a work area**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50320 Diploma of Human Resource Management BSB50420 Diploma of Leadership and Management BSB50820 Diploma of Project Management BSB51319 Diploma of Work Health and Safety BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Organisational and <i>WHS legislative reporting requirements</i>	WHS legislative reporting requirements may relate to: <ul style="list-style-type: none"> notifiable incidents state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes.



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BSBWHS522 Manage WHS consultation and participation processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review <i>WHS laws</i> to identify duty holders and legal requirements for WHS consultation and participation processes	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes, as they relate to duty holders, consultation and participation.
1.2 Review <i>organisational policies, procedures, processes and systems</i> to identify requirements and opportunities for WHS consultation and participation	<p>Organisational policies, procedures, processes and systems to identify requirements and opportunities for WHS consultation may relate to:</p> <ul style="list-style-type: none"> communication policies (both internally and externally) consultation and duty holder responsibilities as per state, territory or Commonwealth work health and safety legislation escalation, emergency response and reporting procedures identifying when, how and who to consult with effectively industry codes of practice and compliance codes (e.g. manual handling) privacy and confidentiality organisational mission, vision and values notifiable incidents (e.g. injuries, illnesses) recordkeeping.
1.3 Consult with <i>required personnel</i> according to organisational procedures to identify specific requirements for WHS consultation and participation	<p>Required personnel may include:</p> <ul style="list-style-type: none"> external personnel (e.g. regulatory authorities, industry bodies, WHS specialists, inspectors) internal personnel (e.g. duty holders, health and safety representatives [HSRs] or committees).
3.1 Identify <i>factors that may impact on design of WHS consultation and participation processes</i>	<p>Factors that may impact on design of WHS consultation and participation processes may include:</p> <ul style="list-style-type: none"> cultural diversity language, literacy and numeracy levels of the workforce management approach organisational culture, structure, size and location shift work and rostering arrangements specific needs of workforce timing of information and data provision.
5.1 Develop <i>evaluation protocol</i> , in consultation with required personnel	<p>Evaluation protocol may relate to:</p> <ul style="list-style-type: none"> collation of information and data (e.g. what information will be collated and how) criteria measurement system what and how information will be gathered.



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BSBWHS522 Manage WHS consultation and participation processes**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB51319 Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Uses <i>digital systems and tools for data collection and analysis</i> and communication and reporting	<p>Digital systems and tools for data collection and analysis may include:</p> <ul style="list-style-type: none"> • commercial WHSIS software (e.g. Pegasus, QuickSafe) • customised organisational systems • data cleansing and visualisation software • internal databases • internal drives • intranets • spreadsheets • websites.
Knowledge Evidence	Notes
<i>Internal and external sources of WHS information and data, and procedures for accessing them</i>	<p>Internal and external sources of WHS information and data:</p> <ul style="list-style-type: none"> • external sources (e.g. Australian Bureau of Statistics, industry networks and bodies, employer associations, state, territory or Commonwealth regulators, Safe Work Australia, The OHS Body of Knowledge unions, WHS specialists) • internal sources (e.g. audit reports, incident and hazard reports, incident risk registers, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, previous assessments, relevant international and Australian standards, risk assessment reviews, WHSMS). <p>Sources of information and data may vary depending on organisation size.</p>



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BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify hazardous chemicals in work area according to <i>legislative requirements</i> and <i>workplace procedures</i>	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth work health and safety (WHS) Acts and Regulations. <p>Workplace procedures may relate to:</p> <ul style="list-style-type: none"> industry and regulator codes of practice and compliance codes incident response procedures and records health monitoring labelling and classification registers and manifests of hazardous chemicals training and development transportation of chemicals workplace exposure standards for chemicals.
1.3 Consult with <i>required personnel to address any identified deficiencies</i> and update hazardous chemicals register and safe work method statements (SWMSs) according to legislative requirements	<p>Required personnel to address any identified deficiencies may include:</p> <ul style="list-style-type: none"> industry associations peak bodies (e.g. specialist agencies including Australian Industrial Chemicals Introduction Scheme [AICIS], European Chemicals Agency [ECHA], Globally Harmonised System of Classification and Labelling of Chemicals [GHS]) manufacturers suppliers WHS specialists.
2.1 Establish suitable control methods and incident action plans within work area, consulting with required personnel and seeking <i>external specialist advice</i> as required	<p>External specialist advice may include:</p> <ul style="list-style-type: none"> emergency services industry associations peak bodies (e.g. specialist agencies including Australian Industrial Chemicals Introduction Scheme [AICIS], European Chemicals Agency [ECHA], Globally Harmonised System of Classification and Labelling of Chemicals [GHS]) WHS specialists.



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BSBWHS531 Implement and evaluate system of work for managing hazardous chemicals

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB51319 Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.3 Monitor work area activities, processes and procedures for compliance with established control methods, and <i>SDSs and SWMSs requirements</i> according to workplace procedures	<p>SDSs and SWMSs requirements may relate to:</p> <ul style="list-style-type: none"> responsibilities for preparation, review and provision of SDSs and SWMS state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes relating to chemicals that need SDSs.



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BSBWHS603 Implement WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>individuals and parties</i> who need to participate in, contribute to, and be consulted during each stage of WHS risk management	<p>Individuals and parties may include:</p> <ul style="list-style-type: none"> external stakeholders impacted by risk (e.g. public) health and safety representatives (HSRs) managers PCBUs specialist advisors (e.g. external WHS teams, ergonomic specialists) supervisors of specific areas or departments unions workers work health and safety regulators or inspectors.
3.1 Access existing workplace <i>WHS information and data</i>	<p>WHS information and data may include:</p> <ul style="list-style-type: none"> internal information and data (e.g. audit reports, hazard reports, incident statistics, workforce statistics, job safety analysis [JSA] outcomes, maintenance reports, meeting minutes, organisational policies and procedures, previous assessments, risk registers) external information and data (e.g. industry reports, industry-wide hazard alerts, state, territory and Commonwealth Acts, regulations and standards, manufacturer and supplier information, prosecution summaries, thought leadership, compliance codes, legal summaries).

Foundation Skills	Notes
Reading: Interprets and critically analyses <i>complex texts</i> to identify parties, processes, legislative requirements and other relevant information	<p>Complex texts may include:</p> <ul style="list-style-type: none"> audit, maintenance, incident and hazard reports case study summaries codes of practice journal articles legislation relevant industry publications and reports safety data sheets (SDSs) thought leadership.



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BSBWHS603 Implement WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>formal and informal processes to monitor implementation of solutions</i> and reflect on outcomes of risk management processes	<p>Formal processes to monitor implementation of solutions may include:</p> <ul style="list-style-type: none"> assessment audit reports communication and consultation control measures hazard and risk identification risk management process statistics (e.g. inspection data, reduction in incidents). <p>Informal processes may include:</p> <ul style="list-style-type: none"> observation. <p>Monitoring implementation of solution may relate to:</p> <ul style="list-style-type: none"> audit processes minutes of meetings.
Get the work done: Uses familiar <i>digital systems and tools</i> to access, organise, analyse and display information relevant to role	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> commercial software and tools (e.g. bowtie analysis software, risk assessment tools) databases internal applications / software internal drives intranets mobile devices and applications presentation software spreadsheets virtual meeting technology websites work health and safety information systems (WHSIS) word processing tools.
Knowledge Evidence	Notes
Identify other <i>functional areas</i> that impact on the management of WHS	<p>Functional areas may include:</p> <ul style="list-style-type: none"> finance human resources and industrial relations (HRIR) legal operations purchasing and procurement quality workers' compensation.



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BSBWHS603 Implement WHS risk management**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
List a range of <i>risk analysis and assessment techniques</i> and tools and their application and limitations	<p>Risk analysis and assessment techniques may include:</p> <ul style="list-style-type: none"> • bowtie assessments • causation assessments • entire project assessment (ergonomic, machine assessment) • job safety analysis (JSAs) • human factor assessments • nomograms • risk matrices.
Outline relevant and applicable <i>Australian legislation, standards and publications</i>	<p>Australian legislation may include:</p> <ul style="list-style-type: none"> • anti-discrimination • Equal Employment Opportunity (Commonwealth Authorities) Act 1987 • state, territory and Commonwealth work health and safety (WHS) Acts, Regulations and compliance codes, as they relate to duty holders. <p>Standards and publications may relate to:</p> <ul style="list-style-type: none"> • environmental standards • designing controls • risk management standards (e.g. AS ISO 31000:2018). <p>Risk management publications may include bodies of knowledge, industry and professional publications.</p>



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BSBWHS605 Develop, implement and maintain WHS management systems**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.2 Develop and implement an initial <i>WHS review</i> , as required, appropriate to own job role	<p>WHS review may relate to:</p> <ul style="list-style-type: none"> external, industry or recertification audits familiarisation incident induction major organisational change programmed response (e.g. annual review) regulator inspection. <p>Own role may include:</p> <ul style="list-style-type: none"> committee member safety personnel.
5.2 Facilitate and <i>support the participation of, and consultation with, individuals and parties</i> in measuring and evaluating WHS performance	<p>Supporting of participation and consultation may include:</p> <ul style="list-style-type: none"> holding pre-audit meetings pre-inspection meetings prior warnings promotion of processes. <p>Individuals and parties may include:</p> <ul style="list-style-type: none"> health and safety representatives (HSRs) managers others impacted by risk (e.g. public) specialist advisors (e.g. WHS specialist) supervisors of specific areas workers.
Foundation Skills	Notes
Reading: Interprets and critically analyses and applies appropriate strategies to construct meaning from <i>complex texts</i> , in relation to determining requirements of the WHSMS and WHS plan and policy	<p>Complex texts may include:</p> <ul style="list-style-type: none"> Australian and international standards (e.g. ISO 45001:2018) audit, maintenance, incident and hazard reports case study summaries codes of practice journal articles legislation relevant industry publications and reports safety data sheets (SDSs) thought leadership.



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BSBWHS605 Develop, implement and maintain WHS management systems**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>digital tools and systems</i> to complete routine tasks, adapting some functions to improve personal efficiency in consultation, measurement and reporting	Digital tools and systems may include: <ul style="list-style-type: none"> commercial management software and tools databases internal applications / software internal drives intranets mobile devices and applications presentation software spreadsheets virtual meeting technology websites work health and safety information systems (WHSIS) word processing tools.
Knowledge Evidence	Notes
Give examples of <i>barriers to WHSMS implementation</i> and strategies to overcome them	Barriers to WHSMS implementation may include: <ul style="list-style-type: none"> external barriers (e.g. customers, political environment and economic pressures, priorities coming in from clients, regulatory authorities, supply chain pressures) internal barriers (e.g. finance, human capital factors, language, organisational culture, perceptions, technology, workforce characteristics).
Outline relevant Commonwealth and state or territory WHS Acts, regulations, <i>codes of practice, standards, guidance material and other relevant publications</i>	Codes of practice, standards and guidelines may include: <ul style="list-style-type: none"> Australian and international standards regulatory authority compliance codes and codes of practice Safe Work Australia resources.
Outline <i>requirements for recordkeeping</i> that address WHS, privacy and other relevant legislation	Requirements for recordkeeping may include: <ul style="list-style-type: none"> access and storage of information in system injury reporting legal regulations legislation privacy and confidentiality separation of information (e.g. medical information) time requirements.
Describe the structure and <i>functions of a WHSMS</i>	Functions of a WHSMS may include: <ul style="list-style-type: none"> functions of individual systems provision of formal processes to manage safety across an organisation structure systematic method of data collection on safety issues.
Summarise WHSMS <i>certification and auditing standards, processes and requirements</i>	Certification and auditing standards may include: <ul style="list-style-type: none"> certification against relevant standards (e.g. ISO 45001:2018) industry-specific standards.



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BSBWHS611 Develop and implement strategies that support work-related psychological health and safety

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Access and assess <i>information and data</i> relevant to creating and sustaining a psychologically healthy and safe workplace	<p>Information and data may include:</p> <ul style="list-style-type: none"> external information and data (e.g. codes of practice and industry guides, regulatory authority resources, published data from specialist organisations, Safe Work Australia) internal information and data (e.g. employee assistance programs [EAP], incident reports, internal statistics such as near misses and absences).
1.3 Review complaints and incidents relating to work-related psychological health and safety, and associated <i>psychosocial hazards</i>	<p>Psychosocial hazards may include:</p> <ul style="list-style-type: none"> aggression bullying fatigue stress violence.
2.2 Communicate work-related psychological health and safety <i>strategies to required personnel</i>	<p>Strategies may relate to:</p> <ul style="list-style-type: none"> early intervention employee assistance programs (EAPs) preventing harm recovery support. <p>Required personnel may include:</p> <ul style="list-style-type: none"> duty holders health and safety representatives (HSRs) human resources managers specialist support and advisors (e.g. WHS specialist, medical personnel, counsellors) supervisors of specific areas workers.
2.4 Identify <i>situations</i> where specialist support is required and access support as needed	<p>Situations where specialist support is required may include:</p> <ul style="list-style-type: none"> beyond scope of workplace management people demonstrating behaviours requiring a specialist response.
Performance Criteria	Notes
3.3 Apply established <i>evaluation processes and procedures</i>	<p>Evaluation processes may include:</p> <ul style="list-style-type: none"> key performance indicators performance measures return on expectations of program surveys.



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BSBWHS611 Develop and implement strategies that support work-related psychological health and safety

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Identifies own and others' <i>legal rights and responsibilities</i> relating to work-related psychological health and safety	<p>Legal rights and responsibilities may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation • criminal legislation • Fair Work Act 2009 • Privacy Act 1998 • state, territory and Commonwealth work health and safety (WHS) Acts and Regulations, highlighting the duties, requirements and responsibilities of PCBUs, officers, workers and others in the workplace in relation to psychosocial health and safety.



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BSBWHS612 Develop and implement a strategy to support a positive WHS culture**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 <i>Analyse current good practice theories, programs and policies</i> about organisational WHS culture	<p>Analysing current good practice theories, programs and policies may relate to:</p> <ul style="list-style-type: none"> • barriers • benefits • limitations • research.
1.3 Document <i>assessment</i> outcomes according to organisational policies and procedures	<p>Assessments may include relate to:</p> <ul style="list-style-type: none"> • audits • communication of assessment outcomes • culture surveys • gap analysis.
1.4 Communicate desired WHS culture to <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • duty holders • health and safety representatives (HSRs) • human resources • managers • specialist support and advisors (e.g. WHS specialist, medical personnel, counsellors) • supervisors of specific areas • workers.
2.2 Determine <i>resourcing</i> required to implement a leadership-driven WHS culture	<p>Resourcing may relate to:</p> <ul style="list-style-type: none"> • financials • human capital • materials • physical resources • skills.
3.4 <i>Disseminate information and data that promote WHS culture</i> to required personnel, according to organisational policies and procedures	<p>Disseminating information and data that promote WHS culture may include:</p> <ul style="list-style-type: none"> • formal and informal communications policies • internal applications • focus groups • meetings or toolbox talks • presentations • roadshows • various media. <p>Information and data may include:</p> <ul style="list-style-type: none"> • codes of practice and compliance codes • industry guides • published data from bodies (e.g. Beyond Blue, mental health training organisations) • regulatory authorities • Safe Work Australia resources.



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BSBWHS612 Develop and implement a strategy to support a positive WHS culture**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.2 <i>Seek feedback</i> on implemented strategy from internal stakeholders, and external <i>stakeholders as required</i>	<p>Seeking feedback may include:</p> <ul style="list-style-type: none"> • consultation • emails • focus groups • meetings • surveys. <p>Stakeholders may include:</p> <ul style="list-style-type: none"> • supervisors • team members • witnesses • work health and safety (WHS) managers.
4.3 Apply established <i>evaluation processes and procedures</i>	<p>Evaluation processes and procedures may include:</p> <ul style="list-style-type: none"> • key performance indicators (KPIs) • performance measures • return on expectations of program • surveys.
Knowledge Evidence	Notes
<i>Legislative requirements relating to WHS culture</i> , including privacy and confidentiality considerations of WHS records and information	<p>Legislative requirements relating to WHS culture may include:</p> <ul style="list-style-type: none"> • anti-discrimination • Equal Employment Opportunity (Commonwealth Authorities) Act 1987 • state, territory and Commonwealth WHS Acts, Regulations and compliance codes, as they relate to duty holders.
Key features of <i>good-practice strategies for creating a positive WHS culture</i>	<p>Good-practice strategies for creating a positive WHS culture may relate to:</p> <ul style="list-style-type: none"> • inclusion • comprehensive research • industry and regulatory authority guidelines, codes of practice and compliance codes.
<i>Communication and consultation processes</i> relating to creating a positive WHS culture and strategy implementation	<p>Communication and consultation processes may be:</p> <ul style="list-style-type: none"> • focused • inclusive • promotional • receptive to feedback • responsible.



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BSBWHS613 Evaluate the WHS performance of an organisation**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify <i>workplace hazard identification activities</i> and compare them with <i>organisational WHS policies and procedures</i>	<p>Workplace hazard identification activities may relate to:</p> <ul style="list-style-type: none"> • consultation • communication and understanding of duty holders responsibilities • determining what may be 'reasonably practicable' • inspections • safe work design • training and development <p>Organisational WHS policies and procedures may relate to:</p> <ul style="list-style-type: none"> • communication policies (e.g. ensuring all workers understand work health and safety [WHS] responsibilities, communicating across multiple languages) • industry codes of practice and compliance codes (e.g. manual handling) • notifiable incidents (e.g. injuries, illnesses) • record-keeping • reporting and escalation • state, territory and Commonwealth WHS Acts, Regulations and compliance codes.
1.4 Identify <i>organisational factors that impact on hazard identification</i>	<p>Organisational factors that impact on hazard identification may include:</p> <ul style="list-style-type: none"> • authority • geographical spread of sites • nature of hazards and level of risk • other management systems requiring interface or integration with management of WHS • reporting, supervision and workforce structure • workplace culture, including industrial relations and safety culture • work design.
1.5 Review outcomes of examinations with <i>specialist personnel</i> , as required	<p>Specialist personnel may include:</p> <ul style="list-style-type: none"> • government authorities (e.g. The Department of Health) • manufacturers • professional associations (e.g. Australian Institute of Health & Safety [AIHS], Human Factors and Ergonomics Society of Australia [HFESA], The Australian Institute of Occupational Hygienists [AOIH], Australian and New Zealand Society of Occupational Medicine [ANZOM]) • suppliers • regulatory authorities • WHS consultants or specialists.
4.1 Identify industry benchmarks and required <i>legislation</i>	<p>Legislation may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth WHS Acts, Regulations and compliance codes.



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BSBWHS613 Evaluate the WHS performance of an organisation

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
4.5 Document outcomes of compliance assessment and report to <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • customers and clients • contractors and subcontractors • duty holders • health and safety committees • PCBUs • WHS inspectors • workers.
Foundation Skills	Notes
Reading: Interprets, analyses and evaluates <i>complex organisational texts</i> in relation to WHS policies, procedures, systems, and management arrangements	<p>Complex organisational texts may include:</p> <ul style="list-style-type: none"> • audit, maintenance, incident and hazard reports • benchmarks • organisational policies and procedures • safety data sheets (SDSs).
Get the work done: Uses a range of <i>digitally-based technology</i> and applications to access and filter data, and to extract, organise, integrate and share relevant information	<p>Digitally-based technology may include:</p> <ul style="list-style-type: none"> • commercial software and tools (e.g. bowtie analysis software, risk assessment tools) • data visualisation and cleansing software • databases • internal applications and software • internal drives • spreadsheets • websites • work health and safety information systems (WHSIS) • word processing tools.
Assessment Conditions	Notes
Relevant Acts, regulations, codes of practice, <i>standards and guidance materials</i>	<p>Standards and guidance materials may include:</p> <ul style="list-style-type: none"> • Australian and international standards • industry-specific standards • Safe Work Australia resources.



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BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify and obtain <i>relevant documentation</i> about operation of organisation	<p>Relevant documentation may include:</p> <ul style="list-style-type: none"> • codes of practice and compliance codes • guidance material • industry standards • organisational documents • state, territory and Commonwealth based WHS legislation.
1.3 Identify and arrange <i>resources</i> required to conduct audit under lead auditor's guidance	<p>Resourcing may relate to:</p> <ul style="list-style-type: none"> • financials • human capital • materials • physical resources • skills.
1.6 Submit draft audit plan to <i>required personnel</i> for consultation and feedback	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • contractors and subcontractors • customers or clients • health and safety committee • health and safety representatives (HSRs) • PCBUs • senior management • workers.
2.2 Identify range of available <i>WHS audit tools</i> and assess their suitability for intended purpose and work area	<p>Audit tools may include:</p> <ul style="list-style-type: none"> • commercial audit tools • organisation-specific audit tools.

Foundation Skills	Notes
Reading: Identifies, interprets and analyses <i>legislative</i> and <i>organisational texts</i> relevant to WHS audit requirements	<p>Legislative texts may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth based WHS Acts, Regulations and compliance codes. <p>Organisational texts may include:</p> <ul style="list-style-type: none"> • audit, maintenance, incident and hazard reports and logs • benchmarks • complaints • interviews with duty holders and workplace personnel • organisational policies, procedures and operational documentation • safety data sheets (SDSs) • training and development materials and evidence • workers' compensation claims.



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BSBWHS614 Conduct a WHS audit under the guidance of a lead auditor**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>digital systems and tools</i> to access, record, organise, analyse and display information	Digital systems and tools may include: <ul style="list-style-type: none"> • commercial software and tools • data visualisation and cleansing software • databases • internal applications / software • internal drives • Spreadsheets • virtual meeting technology • websites • work health and safety information systems (WHSIS) • word processing tools.
Knowledge Evidence	Notes
Internal and external <i>sources of WHS information and data</i> , and procedures for accessing them	Sources of WHS information and data may include: <ul style="list-style-type: none"> • external sources (e.g. Australian Bureau of Statistics [ABS], industry networks and bodies, state, territory or Commonwealth regulators, Safe Work Australia, unions, WHS specialists) • internal sources (e.g. those listed under organisational texts).



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BSBWHS616 Apply safe design principles to control WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Advise on <i>methods and tools</i> that can support <i>WHS hazard identification</i> and WHS risk assessment throughout a <i>product's life cycle</i>	<p>Methods and tools that can support WHS hazard identification may include:</p> <ul style="list-style-type: none"> • job hazard analysis (JHAs) • job safety analysis (JSAs) • Safe Work Method Statements (SWMS) • site walks. <p>Product life cycle may include:</p> <ul style="list-style-type: none"> • Design • dismantling • disposal • manufacturing • transport, supply and installation • use, maintenance and servicing.
3.2 Facilitate involvement of <i>technical experts</i> as required according to organisational processes and procedures	<p>Technical experts may include:</p> <ul style="list-style-type: none"> • design and trades professionals (e.g. architects, builders, surveyors) • engineers • government authorities (e.g. The Department of Health) • legal practitioners • manufacturers • professional associations (e.g. Australian Institute of Health & Safety [AIHS], Human Factors and Ergonomics Society of Australia [HFESA], The Australian Institute of Occupational Hygienists [AOIH], Australian and New Zealand Society of Occupational Medicine [ANZOM]) • suppliers • regulatory authorities • WHS consultants or specialists.

Foundation Skills	Notes
Reading: Identifies, interprets and analyses <i>legislative and organisational texts</i> relevant to safe design	<p>Legislative texts may include:</p> <ul style="list-style-type: none"> • state, territory and Commonwealth based WHS Acts, Regulations and compliance codes. <p>Organisational texts may include:</p> <ul style="list-style-type: none"> • audit, maintenance, incident and hazard reports and logs • benchmarks • complaints • interviews with duty holders and workplace personnel • organisational policies, procedures and operational documentation • safety data sheets (SDSs) • training and development materials and evidence.



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BSBWHS616 Apply safe design principles to control WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>digital systems and tools</i> to access, record, organise, analyse, display and share information	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> • commercial software and tools • data visualisation and cleansing software • databases • internal applications / software • internal drives • spreadsheets • virtual meeting technology • websites • work health and safety information systems (WHSIS) • word processing tools.
Knowledge Evidence	Notes
Internal and external <i>sources of WHS information and data</i> , and procedures for accessing them	<p>Sources of WHS information and data may include:</p> <ul style="list-style-type: none"> • external sources (e.g. Australian Bureau of Statistics [ABS], industry networks and bodies, state, territory or Commonwealth regulators, Safe Work Australia, unions, WHS specialists) • internal sources (e.g. design briefs, contracts, risk registers).



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BSBWHS617 Apply ergonomics to manage WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and evaluate relevant <i>WHS laws, organisational policies and procedures relating to ergonomics</i>	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth based WHS Acts, Regulations and compliance codes. <p>Organisational policies and procedures relating to ergonomics may relate to:</p> <ul style="list-style-type: none"> audit, maintenance, incident and hazard reports and logs benchmarks complaints interviews with duty holders and workplace personnel physical and psychosocial work environments plant, equipment and tools, including their specification and acquisition training and development materials and evidence recordkeeping reporting shift work and general work rosters WHS management systems workplace communications systems and processes work and workplace systems workstations and work areas.
4.4 Seek advice, support and input from <i>specialists</i> as required according to organisational policies and procedures	<p>Specialists may include:</p> <ul style="list-style-type: none"> designers engineers: design, acoustic, safety and mechanical health professionals manufacturers and suppliers of workplace goods and services professional ergonomists.
Foundation Skills	Notes
Get the work done: Uses <i>digital systems and tools</i> to access, record, organise, analyse and display information	<p>Digital systems and tools may include:</p> <ul style="list-style-type: none"> commercial software and tools data visualisation and cleansing software databases internal applications / software internal drives spreadsheets virtual meeting technology websites work health and safety information systems (WHSIS) word processing tools.



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BSBWHS631 Apply occupational hygiene principles to manage WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB60619 Advanced Diploma of Work Health and Safety	N/A
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify and evaluate relevant <i>WHS laws, organisational policies and procedures relating to occupational hygiene</i>	<p>WHS laws may include:</p> <ul style="list-style-type: none"> state, territory and Commonwealth based WHS Acts, Regulations and compliance codes. <p>Organisational policies and procedures relating to occupational hygiene may relate to:</p> <ul style="list-style-type: none"> audit, maintenance, incident and hazard reports and logs benchmarks complaints consultation with duty holders and workplace personnel hazard identification physical and psychosocial work environments training and development materials and evidence recordkeeping reporting risk controls workplace communications systems and processes workstations and work areas.
1.2 Use workplace WHS information to identify exposure to <i>WHS hazards</i> that could give rise to worker ill health	<p>WHS hazards may include:</p> <ul style="list-style-type: none"> biological (e.g. infectious diseases) chemical environmental (including those that may impact relevant communities) electrical physical (e.g. noise, injury, violence, hazardous manual tasks) Plant or equipment psychological.
1.5 Identify and document situations where <i>WHS specialists and other advisers</i> may be required according to organisational policies and procedures	<p>WHS specialists and other advisers may include:</p> <ul style="list-style-type: none"> engineers medical professionals government authorities (e.g. The Department of Health) manufacturers professional associations (e.g. Australian Institute of Health & Safety [AIHS], Human Factors and Ergonomics Society of Australia [HFESA], The Australian Institute of Occupational Hygienists [AOIH], Australian and New Zealand Society of Occupational Medicine [ANZOM]) suppliers regulatory authorities toxicologists.
2.4 Report results of risk assessments, interpretations and recommendations to <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> contractors and subcontractors duty holders senior management unions.



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BSBWHS631 Apply occupational hygiene principles to manage WHS risks**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB60619 Advanced Diploma of Work Health and Safety
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Get the work done: Uses <i>digital systems and tools</i> to access, record, organise, analyse and display information	Digital systems and tools may include: <ul style="list-style-type: none"> • commercial software and tools • data visualisation and cleansing software • databases • internal applications / software • internal drives • spreadsheets • virtual meeting technology • websites • work health and safety information systems (WHSIS) • word processing tools.
Knowledge Evidence	Notes
<i>Common risk controls</i> for a range of environmental hazards and associated occupational hygiene risks, their effectiveness and their limitations	Common risk controls may include: <ul style="list-style-type: none"> • administrative risk controls • personal protective equipment (PPE) (e.g. hearing protection to reduce noise stress from loud noises) • risk elimination (e.g. removing excessive work demands) • risk minimisation (e.g. increased support during forecasted peak periods).



Written communication

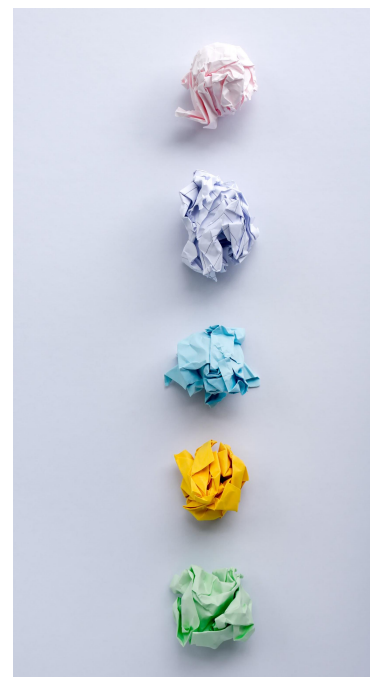
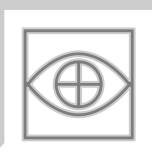
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Written Communication Unit Sector Overview

The Written Communication (WRT) unit sector incorporates units of competency aimed at supporting individuals to develop necessary written communication skills applicable across industries and various job roles.

Written communication, an essential skill in many workplace environments, is often formal (e.g. a memo, report, letter), though sometimes may be less formal (e.g. email or instant messenger). Each type of written communication requires understanding of appropriate style and context.



Glossary of common terminology

Organisational policies	Organisational policies represent an overarching course of action adopted by an organisation.
Organisational procedures	Organisational procedures relate to any established series of actions expected to be conducted in a certain order or manner.
Style guides	Style guides refer to standards to ensure consistency in style and format for the design of organisational material, such as documents, emails and websites.
Word processing	Word processing refers to the creation and manipulation of text on a computer or word processor. Software and tools used for this may be a part of an organisation's internal system, as well as online collaborative word processing tools.

Written Communication Unit of Competency guidance

For further information regarding detailed interpretation of the units of competency in the 'Written Communication' unit stream, please refer to the interpretation guidance provided on pages 676 - 680. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



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BSBWRT311 Write simple documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services BSB30719 Certificate III in Work Health and Safety BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine audience, purpose and <i>requirements</i> for document according to <i>organisation policies and procedures</i>	<p>Requirements may relate to:</p> <ul style="list-style-type: none"> organisational and industry codes of conduct (e.g. how to represent the organisation in written communication) different forms and formatting organisational style guides and templates policies and procedures. <p>Organisation policies and procedures may include:</p> <ul style="list-style-type: none"> style guides templates.
1.2 Determine required <i>format, style and structure</i> for document	<p>Format, style and structure may relate to:</p> <ul style="list-style-type: none"> communication policies organisation style guides templates.
Foundation Skills	Notes
Reading: Interprets a variety of <i>text</i> to determine and confirm task requirements	<p>Texts may include:</p> <ul style="list-style-type: none"> digital communication forums (e.g. chat platforms) emails letters meeting minutes organisational procedures work instructions.
Self-management: Follows accepted <i>communication practices and protocols</i> when seeking information from others	<p>Communication practices and protocols may include:</p> <ul style="list-style-type: none"> accepting feedback active listening allowing for diverse expression of opinion.



Overview

Level 3

Level 4

BSBWRT311 Write simple documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services BSB30719 Certificate III in Work Health and Safety BSB40720 Certificate IV in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Technology: Uses the <i>main features and functions of digital tools</i> to complete work tasks	<p>Main features and functions may include:</p> <ul style="list-style-type: none"> • editing • formatting • grammar and spell checks • help menus and functions • meeting invitations • participating in online forums • recording information • referencing. <p>Digital tools may include:</p> <ul style="list-style-type: none"> • email services • forums • presentation tools (e.g PowerPoint, Adobe Spark) • screencasting and recording tools • virtual meeting technology • word processing tools. <p>Main features and functions of digital tools may depend on the tool being used.</p>
Assessment Conditions	Notes
Office <i>equipment and resources</i> to assist in the production of documents	<p>Equipment and resources may include:</p> <ul style="list-style-type: none"> • computers • internet access • paper and pens • software.
Examples of <i>documents</i> to review	<p>Documents may include:</p> <ul style="list-style-type: none"> • emails • letters • meeting minutes • organisational procedures • work instructions.



Overview

Level 3

Level 4

BSBWRT411 Write complex documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40820 Certificate IV in Marketing and Communication BSB50720 Diploma of Paralegal Services	BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine audience, purpose and <i>requirements</i> of document according to <i>organisation policies and procedures</i>	<p>Requirements may relate to:</p> <ul style="list-style-type: none"> organisational and industry codes of conduct (e.g. how to represent the organisation in written communication) different forms and formatting organisational style guides and templates policies and procedures. <p>Organisation policies and procedures may include:</p> <ul style="list-style-type: none"> style guides templates.
1.2 Determine required <i>format, style and structure</i> for document	<p>Format, style and structure may relate to:</p> <ul style="list-style-type: none"> communication and referencing policies organisation style guides templates.
2.2 Develop draft document to communicate data, information and knowledge according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> style guides templates.
3.3 Confirm draft text is approved by <i>relevant organisation personnel</i>	<p>Relevant organisation personnel may include:</p> <ul style="list-style-type: none"> colleagues managers supervisors.
3.5 Apply <i>basic design elements</i> for document appropriate to audience and purpose	<p>Basic design elements may include:</p> <ul style="list-style-type: none"> instructional design principles outlined in organisational style guide and templates.



Overview

Level 3

Level 4

BSBWRT411 Write complex documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40820 Certificate IV in Marketing and Communication BSB50720 Diploma of Paralegal Services	BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Interprets a variety of <i>text</i> to determine and confirm task requirements	<p>Texts may include:</p> <ul style="list-style-type: none"> • action items • briefings • emails • letters • meeting minutes • messages • online resources • organisational procedures • reports • work instructions.
Self-management: Follows accepted <i>communication practices and protocols</i> when seeking information or feedback from others	<p>Communication practices may include:</p> <ul style="list-style-type: none"> • adopting best practice according to organisational requirements • planning • preparing drafts. <p>Communication protocols may relate to:</p> <ul style="list-style-type: none"> • confidentiality • naming conventions for draft approvals • privacy • version control.
Technology: Uses the <i>main features and functions of digital tools</i> to complete work tasks	<p>Main features and functions may include:</p> <ul style="list-style-type: none"> • editing features • formatting functions • grammar and spell checks • help menus and functions • meeting invitations • recording information • referencing. <p>Digital tools may include:</p> <ul style="list-style-type: none"> • presentation tools (e.g PowerPoint, Adobe Spark) • screencasting and recording tools • word processing tools. <p>Main features and functions of digital tools may differ depending on the tool being used.</p>



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Level 3

Level 4

BSBWRT411 Write complex documents

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40820 Certificate IV in Marketing and Communication BSB50720 Diploma of Paralegal Services	BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services BSB41419 Certificate IV in Work Health and Safety BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00107 Marketing and Communication Foundations Skill Set	

Unit of Competency Interpretation Summary

Performance Evidence	Notes
Review and analyse a range of <i>information sources</i>	Information sources may include: <ul style="list-style-type: none"> • data and statistics • online sources.
Knowledge Evidence	Notes
<i>Key features</i> of word processing software	Key features may relate to: <ul style="list-style-type: none"> • creation of templates • development of online content • style guides • graphics and tables • links to other documents (e.g live google documents) • report writing.
<i>Key features</i> of written communication methods, including: <ul style="list-style-type: none"> • general emails • procedures • business letters • meeting agendas 	Key features may include: <ul style="list-style-type: none"> • introduction • body • conclusion • sentence structure • subject line.
Assessment Conditions	Notes
<i>Office equipment and resources</i>	Office equipment and resources may include: <ul style="list-style-type: none"> • computers • internet access • paper and pens • software.



Cross-Sector

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Cross-Sector

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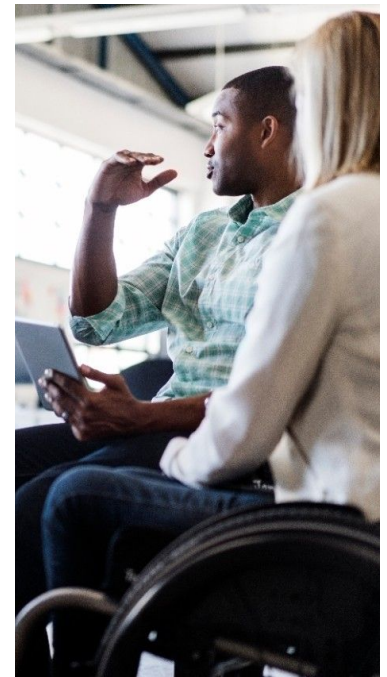
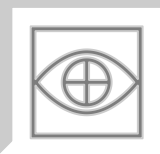
XDB

WHSX

Cross-Sector Units of Competency Overview

Many of the skills most valued by industry cut across multiple sectors of Australia's economy. However, training package components are not always developed in a way that recognises the importance of skills in multiple sectors or encourages training products to be used to their full potential in various industry contexts. The Australian Industry and Skills Committee (AISC) has identified several cross sector skills areas where opportunities exist to create flexible and transferable training package components that will benefit industry, learners and the broader VET sector. These cross sector skills are at the forefront of growth and innovation in Australia.

The intention of the cross sector training products is for industries and training package developers to import these units of competency into industry relevant qualifications in a manner that suits the job roles in those industries. Consequently, these units have been written in a way that allows for contextualisation to different industries.



Overview of Cross-Sector unit sectors

Big data (XBD)	Big data is becoming more abundant within organisations. Due to the broad reaching nature of big data in an increasingly digital world, there is a long list of industries which could potentially benefit from improved big data related training products.
Cyber security (XCS)	Cyber security is an increasingly important issue that affects all industries and organisations, large and small. Currently there are very limited training options available in VET for those not in specialist IT roles to improve their skills in supporting a cyber secure workforce.
Teamwork and communication (XTW, XCM)	The teamwork and communication cross sector skills stemmed from an initial analysis that found there were large numbers of units of competency across all training packages covering these topics. It was identified that it would be beneficial for these skills to be consolidated into common units to enable learners to develop skills that easily transferable across industries.
Inclusion of people with disability (XDB)	The cross sector units in this space focus on upskilling individuals who engage with people with disability in workplaces and education settings, so as to facilitate enhanced inclusion of people with disability.
Infection prevention and control (WHSX)	The development of this unit was instigated by the COVID-19 pandemic and recovery phase; however, has been developed as a new unit of competency to be applicable across a variety of roles and sectors and is designed to address infection prevention and control generally, not specific to one pandemic. The unit addresses skills and knowledge required to apply infection prevention and control procedures to own work activities, to ensure a safe return to work.



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Cross-Sector Unit of Competency guidance

For further information regarding units of competency relevant to the Cross-Sector please refer to the detailed interpretation guidance on pages 685 - 719. Content for each unit reflects those items identified in consultation that would benefit from guidance. Not all requirements of a unit of competency are addressed by this Manual.



The information in this Guide is offered as supplementary interpretation guidance relating to the BSB Business Services Training Package Version 7. The interpretations and advice in this Guide are not enforceable and serve as guidance only. ASQA, VRQA and TAC are the sector regulators responsible for determining matters of compliance in relation to training providers.



Overview

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BSBXBD401 Capture and store big data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00091 Capture and Present Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.4 Identify <i>data storage and archive requirements</i>	<p>Data storage and archive requirements may relate to:</p> <ul style="list-style-type: none"> • data size • security • storage location • storage time.
2.3 Obtain big data from identified sources according to <i>legislative requirements and organisational policies and procedures</i>	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS]) <p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS)
2.4 Apply <i>big data cleansing methodologies</i>	<p>Big data cleansing methodologies may include removal of:</p> <ul style="list-style-type: none"> • blank or incorrectly formatted data • duplicates • irrelevant observations • unwanted data.
Knowledge Evidence	Notes
<i>Data capture techniques</i> to produce analytic ready data and datasets	<p>Data capture techniques may include:</p> <ul style="list-style-type: none"> • action research • classification • experiments • interviews • participant observation • physical traces analysis • semiotics • surveys • statistical data analysis • statistical surveys.



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BSBXBD402 Test big data samples

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00091 Capture and Present Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.3 Consult with <i>required personnel</i> to clarify and resolve identified anomalies	<p>Relevant personnel may include:</p> <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • supervisor • product suppliers and contractors.
3.4 Generate and store results of validation activity and associated supporting evidence according to <i>organisational policies and procedures, and legislative requirements</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS) <p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])

Foundation Skills	Notes
Uses appropriate <i>technology platforms</i> and query languages and scripts to test big data	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • Cloudera • Collibra • Datameer. • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.



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BSBXBD403 Analyse big data**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00091 Capture and Present Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Determine <i>organisational requirements</i> for big data analysis	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> customer confidence customer demographics data knowledge and management response times scalability security website traffic.
1.2 Identify <i>internal and external sources</i> of big data to be analysed according to <i>organisational policies and procedures</i> and <i>legislative requirements</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> Australian Privacy Principles privacy and confidentiality work health and safety (WHS) <p>Legislative requirements may include:</p> <ul style="list-style-type: none"> Do Not Call Register Act 2006 industry-specific data protection legislation Privacy Act 1988 Spam Act 2003 state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
2.3 Analyse big data and derive insights into trends using <i>required tools and dashboards</i>	<p>Required tools may include:</p> <ul style="list-style-type: none"> Alteryx Cloudera Collibra Datameer. MapR Microsoft Azure MongoDB Oracle Qualtrics Sisense Tableau.



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BSBXBD403 Analyse big data**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40520 Certificate IV in Leadership and Management BSB40820 Certificate IV in Marketing and Communication
Skill sets	BSBSS00091 Capture and Present Big Data Skill Set	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Uses appropriate <i>technology platforms</i> to analyse big data	Technology platforms may include: <ul style="list-style-type: none"> • Alteryx • Cloudera • Collibra • Datameer. • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.



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BSBXBD404 Use big data for operational decision making

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40520 Certificate IV in Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Access required big data sources and summaries according to <i>organisational policies and procedures and legislative requirements</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS) <p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
3.2 Seek input and integrate feedback from <i>required stakeholders</i> according to organisational policies and procedures	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • supervisor • product suppliers and contractors.
Foundation Skills	Notes
Technology: Uses appropriate <i>technology platforms</i> when using big data	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • Alteryx • Cloudera • Collibra • Datameer. • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.
Knowledge Evidence	Notes
Key programming protocols and <i>techniques</i> required to use big data for operational decision making	<p>techniques may relate to:</p> <ul style="list-style-type: none"> • descriptive • inquisitive • predictive • prescriptive • pre-emptive.



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BSBXBD405 Develop procedures for managing big data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00092 Manage Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Engage <i>required stakeholders</i> to test draft big data procedures	<p>Required stakeholders may include:</p> <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • supervisor • product suppliers and contractors.
4.4 Store procedures according to established <i>document management protocols</i>	<p>Document management protocols may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS)
Foundation Skills	Notes
Uses appropriate <i>technology platforms</i> to develop procedures for managing big data	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • Alteryx • Cloudera • Collibra • Datameer. • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.
Knowledge Evidence	Notes
<i>Legislative requirements</i> relating to managing big data, including data protection and privacy laws and regulations	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
<i>Protocols for database management</i> , including open-source database management systems designed to handle big data	<p>Protocols for database management may relate to:</p> <ul style="list-style-type: none"> • calibration and maintenance • choice of site • choice of instrumentation • data storage • proficiency of staff • processes • retrieval and analysis systems.



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BSBXBD406 Present big data insights

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00091 Capture and Present Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Present big data to <i>required stakeholders</i> in a format that meets business needs	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • supervisor.
Foundation Skills	Notes
Technology: Uses appropriate <i>technology platforms</i> to present big data	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • Alteryx • Cloudera • Collibra • Datameer • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.
Knowledge Evidence	Notes
Structured, semi-structured and unstructured <i>big data visualisation tools</i> and techniques	<p>Big data visualisation tools may include:</p> <ul style="list-style-type: none"> • Canvas • D3 • Datawrapper • Fusion chart • Google Chart • Highcharts • Microsoft Power BI • Oracle Visual Analyzer • Qlikview • Tableau.
In-house and external sources of big data	<p>Sources of big data may include:</p> <ul style="list-style-type: none"> • Machine data • Social data • Transactional data



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BSBXBD407 Protect big data integrity

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00092 Manage Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Review <i>workplace governance arrangements</i> in place for protecting the integrity of big data	Workplace governance arrangements may relate to: <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS)
3.4 Confirm that data protection practices comply with <i>required standards</i>	Required standards may include: <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
4.3 Consult with required <i>internal and external stakeholders</i> and communicate breach efficiently	Internal and external stakeholders may include: <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • product suppliers and contractors. • supervisor.
Foundation Skills	Notes
Technology: Uses appropriate <i>technology platforms</i> to protect the integrity of big data	Technology platforms may relate to <ul style="list-style-type: none"> • encryption technology.
Knowledge Evidence	Notes
<i>Legislative requirements</i> and standards relating to protecting the integrity of big data, including data protection and privacy laws and regulations	Legislative requirements may include: <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
Infrastructure security, integrity and reactive <i>security</i> as they relate to protecting the integrity of big data	Security may relate to: <ul style="list-style-type: none"> • Encrypted Data-Centric Security • Endpoint Input Validation and Filtering • Granular Access Control • Granular Audits • Mandatory Access Control • Secure Storage and Transaction Logging.



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BSBXBD408 Implement and review procedures for managing big data

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00092 Manage Big Data Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Communicate procedures to <i>relevant stakeholders</i>	<p>Relevant stakeholders may include:</p> <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • product suppliers and contractors. • supervisor.
2.2 Carry out <i>change management</i> initiatives to encourage adoption of procedures	<p>Change management may relate to:</p> <ul style="list-style-type: none"> • developmental change • implementing strategies and methods for effecting change • systematic approaches • transformational change. • transitional change.
Knowledge Evidence	Notes
<i>Techniques for stakeholder management</i>	<p>Techniques for stakeholder management may relate to:</p> <ul style="list-style-type: none"> • announcements • non-verbal communication (e.g. digital technologies and cloud-based communication, emails) • surveys • verbal communication (e.g. face-to-face communication, meetings, telephone calls).
Assessment Conditions	Notes
Information and data <i>sources</i> to inform implementation and review of procedures for managing big data	<p>Sources of big data may include:</p> <ul style="list-style-type: none"> • Machine data • Social data • Transactional data



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BSBXBD501 Develop big data strategy

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50420 Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.1 Scope big data strategy based on <i>relevant policy issues</i> and <i>new and emerging technologies and platforms</i>	New and emerging technologies and platforms <ul style="list-style-type: none"> • Alteryx • Cloudera • Collibra • Datameer • MapR • Microsoft Azure • MongoDB • Oracle • Qualtrics • Sisense • Tableau.
3.2 Draft big data strategy and its governance requirements in line with <i>organisational requirements</i>	Organisational requirements may relate to: <ul style="list-style-type: none"> • Australian Privacy Principles • privacy and confidentiality • work health and safety (WHS)
3.4 Finalise draft strategy and distribute to <i>required personnel</i>	Relevant personnel may include: <ul style="list-style-type: none"> • clients • colleagues • data suppliers • management • product suppliers and contractors. • supervisor.
Knowledge Evidence	Notes
<i>Legislative requirements</i> relating to big data strategy, including data protection and privacy laws and regulations	Legislative requirements may include: <ul style="list-style-type: none"> • Do Not Call Register Act 2006 • industry-specific data protection legislation • Privacy Act 1988 • Spam Act 2003 • state-based data protection legislation (e.g. Information Privacy Act [ACT], Personal Information and Protection Act 2004 [TAS])
Assessment Conditions	Notes
Information and data <i>sources</i> to inform development of big data strategy, including business strategy documents	Sources of big data may include: <ul style="list-style-type: none"> • Machine data • Social data • Transactional data



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BSBXCM301 Engage in workplace communication

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services	BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify information needs and <i>communication requirements</i> of intended recipients of workplace communication	Communication requirements may relate to: <ul style="list-style-type: none"> digital communication non-verbal communication verbal communication.
2.1 Communicate message or information according to <i>organisational requirements</i> and in a manner that is respectful and clear in meaning	Organisational requirements may relate to: <ul style="list-style-type: none"> access and equity industry and organisational codes of conduct organisational reputation and culture organisational templates and style guides privacy and confidentiality state and federal ethical behaviour guidelines and principles workplace policies.
2.5 Identify and report any communication challenges to <i>appropriate person</i>	An appropriate person may be a: <ul style="list-style-type: none"> human resources representative supervisor team leader.
Foundation Skills	Notes
Get the work done: Uses <i>digital technology</i> to find, record or communicate basic information	Digital technology may include: <ul style="list-style-type: none"> computers mobile devices online communication platforms and collaboration tools screencasting and recording tools word processing tools.
Knowledge Evidence	Notes
<i>Legislative requirements</i> relevant to workplace communication	Legislative requirements may include: <ul style="list-style-type: none"> anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Fair Work Act 2009 local, state and territory work health and safety (WHS) legislation Privacy Act 1988.



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BSBXCM401 Apply communication strategies in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40720 Certificate IV in Library and Information Services BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.5 Select appropriate method of communicating information internally and externally based on <i>organisational requirements</i>	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> • access and equity • client communication policies • industry and organisational codes of conduct • organisational reputation and culture • organisational templates and style guides • privacy and confidentiality • state and federal ethical behaviour guidelines and principles • workplace policies.
4.1 Ensure all communication is consistent with <i>legislative</i> and organisational requirements	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
Foundation Skills	Notes
Get the work done: Uses <i>digital technology</i> to find, record or communicate basic information	<p>Digital technology may include:</p> <ul style="list-style-type: none"> • computers • mobile devices • online communication platforms and collaboration tools • screencasting and recording tools • word processing tools.



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BSBXCM401 Apply communication strategies in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB40120 Certificate IV in Business BSB40520 Certificate IV in Leadership and Management BSB40620 Certificate IV in Legal Services	BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB40420 Certificate IV in Human Resource Management BSB40720 Certificate IV in Library and Information Services BSB40820 Certificate IV in Marketing and Communication
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Techniques to resolve communication challenges</i>	<p>Techniques to resolve communication challenges may include:</p> <ul style="list-style-type: none"> • audience identification • augmentative and alternative communication • relevant learning and development (e.g. active listening training). <p>Communication challenges may relate to:</p> <ul style="list-style-type: none"> • cultural barriers • language and literacy barriers • inconsistent communication • workplace conflict.



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BSBXCM501 Lead communication in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Direct others to communicate according to <i>organisational requirements</i> and goals	Organisational requirements may relate to: <ul style="list-style-type: none"> access and equity client communication policies dispute resolution processes industry and organisational codes of conduct organisational reputation and culture organisational templates and style guides privacy and confidentiality state and federal ethical behaviour guidelines and principles workplace policies.
4.2 Obtain feedback from a <i>variety of sources</i> to manage the outcomes of communications and negotiations	A variety of feedback sources may include: <ul style="list-style-type: none"> customers and clients employees department leaders human resource representatives senior management team leaders.
Foundation Skills	Notes
Get the work done: Uses <i>digital technology</i> to find, record or communicate basic information	Digital technology may include: <ul style="list-style-type: none"> computers mobile devices online communication platforms and collaboration tools screencasting and recording tools word processing tools.
Performance Evidence	Notes
Apply <i>negotiation techniques</i> to reach desired outcomes	Negotiation techniques may include: <ul style="list-style-type: none"> employing probing and specific questioning techniques preparation understanding 'walk-away' position understanding what a win is for relevant parties using active listening remaining focused and truthful.



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BSBXCM501 Lead communication in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB50120 Diploma of Business	BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business BSB60420 Advanced Diploma of Leadership and Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Legislative requirements relevant to workplace communication</i>	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> • anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • Fair Work Act 2009 • local, state and territory work health and safety (WHS) legislation • Privacy Act 1988.
<i>Techniques to resolve communication challenges</i>	<p>Techniques to resolve communication challenges may include:</p> <ul style="list-style-type: none"> • audience identification • augmentative and alternative communication • relevant learning and development (e.g. active listening training). <p>Communication challenges may relate to:</p> <ul style="list-style-type: none"> • cultural barriers • language and literacy barriers • inconsistent communication • workplace conflict.



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BSBXTW301 Work in a team

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	BSB30420 Certificate III in Library and Information Services	BSB30120 Certificate III in Business BSB30320 Certificate III in Legal Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify own responsibilities according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may relate to:</p> <ul style="list-style-type: none"> • anti-discrimination (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) • bullying and harassment • communication • diversity and inclusion • induction and orientation • job descriptions • organisational and industry codes of conduct • organisational goals and values • organisational reputation and culture • work health and safety (WHS).
Foundation Skills	Notes
Get the work done: Uses <i>digital technology</i> to find, record or communicate information	<p>Digital technology may include:</p> <ul style="list-style-type: none"> • email • internal messaging systems • virtual meeting technology.
Knowledge Evidence	Notes
<i>Key principles of cross-cultural communication and communication with individuals with special needs or disabilities</i>	<p>Key principles of cross-cultural communication may include:</p> <ul style="list-style-type: none"> • differences in non-verbal interpretation • respect for different cultural etiquette • verbal communication techniques (e.g. speaking slowly, avoiding slang or euphemisms). <p>Key principles of communication with individuals with special needs or disabilities may include:</p> <ul style="list-style-type: none"> • use of augmentative and alternative communication (AAC) • clarification of preferred method/s of communication • inclusive language and person-first expressions.



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BSBXTW401 Lead and facilitate a team**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40520 Certificate IV in Leadership and Management	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Use <i>performance plans</i> to establish expected outcomes, goals, and behaviours for individual team members in accordance with team objective and <i>relevant policies</i>	<p>Performance plans may relate to:</p> <ul style="list-style-type: none"> individual plans aligned with developmental, team and organisational goals team plans aligned with responsibilities, objectives and organisational goals. <p>Relevant policies may include:</p> <ul style="list-style-type: none"> organisational policies industry-specific policies policies outlined in relevant legislation.
3.2 Support individuals according to <i>organisational requirements</i> to work towards common team goals	<p>Organisational requirements may relate to:</p> <ul style="list-style-type: none"> accessibility and equity diversity and inclusion industry or organisational codes of conduct key performance indicators (KPIs) learning and development privacy and confidentiality.
Foundation Skills	Notes
Navigate the world of work: Understands and explains <i>ethical and legal, regulatory</i> and organisational responsibilities to team	<p>Ethical and legal, regulatory responsibilities to team may include:</p> <ul style="list-style-type: none"> anti-discrimination legislation (e.g. Age Discrimination Act 2004, Disability Discrimination Act 1992, Racial Discrimination Act 1975, Sex Discrimination Act 1984) Copyright Act 1968 Fair Work Act 2009 Intellectual Property Laws Amendment Act 2015 local, state and territory work health and safety (WHS) legislation Privacy Act 1988 storage, security and access.



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BSBXTW401 Lead and facilitate a team**Unit of Competency use in the BSB Training Package**

	Core unit	Elective unit
Qualifications	BSB40520 Certificate IV in Leadership and Management	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business
Skill sets	BSBSS00109 Introduction to Team Management Skill Set	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Key principles of cross-cultural communication and communication with individuals with special needs or disabilities</i>	<p>Key principles of cross-cultural communication may include:</p> <ul style="list-style-type: none"> • differences in non-verbal interpretation • respect for different cultural etiquette • verbal communication techniques (e.g. speaking slowly, avoiding slang or euphemisms). <p>Key principles of communication with individuals with special needs or disabilities may include:</p> <ul style="list-style-type: none"> • use of augmentative and alternative communication (AAC) • clarification of preferred method/s of communication • inclusive language and person-first expressions.



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BSBXCS301 Protect own personal online profile from cyber security threats

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	BSBSS00094 Cyber Security Awareness Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>common threats</i> to security of online profiles	<p>Common threats may relate to:</p> <ul style="list-style-type: none"> • cyber abuse (e.g. bullying, online image abuse) • cryptomining • data spill • denial of service • email compromise • identity theft • internet fraud (e.g. phishing, pharming) • hacking • ransomware or malware.
2.1 Review all online accounts, associated applications and browsers at risk of identified threats according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • escalation routes for cyber security issues • review of all devices used for work-related activities (e.g. work desktops, laptops, mobile devices) • password standards and requirements • social media standards.
2.3 Check billing and account records carefully to detect <i>early indicators of potential theft</i>	<p>Early indicators of potential theft may include unexpected:</p> <ul style="list-style-type: none"> • bills • calls (e.g. from debt collectors, from government agencies) • cessation of mail • purchases or withdrawals.
2.4 Report identified suspicious cyber activity according to cyber security <i>legislative requirements</i> and organisational policies and procedures	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • Privacy Act 1988 • Commonwealth, state and territory legislation • The Australian Prudential Regulation Authority (APRA) CPS 234.
Foundation Skills	Notes
Technology: Uses <i>appropriate technology platforms</i> to assist with protecting online profile from cyber security threats	<p>Appropriate technology platforms may relate to:</p> <ul style="list-style-type: none"> • anti-virus software • encryption tools • firewalls • network security monitoring tools • organisational Virtual Private Networks (VPNs) • safe use of public Wi-Fi networks.



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BSBXCS302 Identify and report online security threats

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.2 Identify <i>features of common types of potentially fraudulent communications</i>	<p>Features of common types of potentially fraudulent communications may include:</p> <ul style="list-style-type: none"> • buying or selling (e.g. false billing, online shopping scams) • dating and romance • employment (e.g. pyramid schemes) • fake charities • investments • monetary (e.g. inheritance, rebates, winnings) • threats and extortion.
2.1 Block and report potential security breaches on computer and mobile device according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • escalation routes for cyber security issues • review of all devices used for work-related activities (e.g. work desktops, laptops, mobile devices) • password standards and requirements • social media standards.
2.3 Report security breach or cyber security incident according to <i>legislative requirements</i> and organisational policies and procedures	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Australian Privacy Principles • Australian Government ISM - Guidelines for Cyber Security Incidents (e.g. 'Managing Cyber Security Incidents', 'Reporting Security Incidents') • Privacy Act 1988 • Commonwealth, state and territory legislation • The Australian Prudential Regulation Authority (APRA) CPS 234.
3.1 Provide information to <i>required personnel</i> to assist in documenting potential and actual breaches	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • internal specialists (e.g. information technology specialists, risk specialists) • reporting authorities (e.g. Australian Cyber Security Centre [ACSC]) • supervisors.

Foundation Skills

Technology: Uses appropriate *technology platforms* to share information within the organisation relating to potential online security threats

Notes

Appropriate technology platforms may relate to:

- anti-virus software
- email reporting functions
- network security monitoring tools
- organisational Virtual Private Networks (VPNs).

Knowledge Evidence

Australian government sources of information on current online security threats

Notes

Australian government sources of information on current online security threats may include:

- [Australian Competition & Consumer Commission ScamWatch](#)
- [Australian Cyber Security Centre \(ACSC\)](#)
- [Australian Signals Directorate \(ASD\)](#)
- [business risk management resources](#).



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BSBXCS303 Securely manage personally identifiable information and workplace information

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	BSBSS00094 Cyber Security Awareness Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Review current <i>standards, practices and procedures</i> relating to workplace information	<p>Standards, practices and procedures may relate to:</p> <ul style="list-style-type: none"> • access, storage, sharing and deletion standards • firewall implementation • intrusion monitoring • password strength • program updates • use of security software.
1.2 Identify sensitive data in own workplace environment according to <i>organisational policies and procedures</i> and within scope of own role	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • escalation routes for cyber security issues • review of all devices used for work-related activities (e.g. work desktops, laptops, mobile devices) • password standards and requirements • privacy and security • risk management frameworks • social media standards.
Foundation Skills	Notes
Reading: Recognises and interprets information from <i>relevant sources</i> to determine organisational expectations and legal requirements	<p>Relevant sources may include:</p> <ul style="list-style-type: none"> • industrial codes of practice and guidelines • organisational policies and procedures • government sources • Commonwealth and state-based legislation.
Technology: Uses appropriate <i>technology platforms</i> to assist with data storage, data retrieval and data management	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • cloud-based applications and storage systems • organisational systems (e.g. customer relationship management [CRM]) • spreadsheets • word processing tools.
Assessment Conditions	Notes
<i>Information and data sources</i> relating to cyber security	<p>Information and data sources of information on current online security threats may include:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) • Australian Competition & Consumer Commission ScamWatch • Australian Cyber Security Centre (ACSC) • Australian Signals Directorate (ASD) • business risk management resources • industry codes of practice and guidelines • organisational policies and procedures.



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BSBXCS401 Maintain security of digital devices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40720 Certificate IV in Library and Information Services BSB40920 Certificate IV in Project Management Practice
Skill sets	N/A	

Unit of Competency Interpretation Summary

Foundation Skills	Notes
Reading: Recognises and interprets information from <i>relevant sources</i> to determine organisational expectations relating to cyber security	<p>Relevant sources may include:</p> <ul style="list-style-type: none"> • industrial codes of practice and guidelines • organisational policies and procedures • government sources • Commonwealth and state-based legislation.
Technology: Uses appropriate <i>technology platforms</i> to assist with protection strategies relating to cyber security	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • cloud-based applications and storage systems • data backup systems • data encryption (e.g. when sending emails) • security systems (.g. proprietary software, firewalls, spam filters).
Knowledge Evidence	Notes
<i>Risk management methodologies</i>	<p>Risk management methodologies may relate to:</p> <ul style="list-style-type: none"> • risk management framework implementation • security control selection, implementation and assessment.
<i>Mobile device security strategies</i>	<p>Mobile device security strategies may include:</p> <ul style="list-style-type: none"> • avoidance of public Wi-Fi • dangerous application blocks • password protections (e.g. frequently updated, complex sequence) • organisational Virtual Private Networks (VPNs) • remote lock and data wipe processes.
Assessment Conditions	Notes
<i>Information and data sources</i> relating to cyber security	<p>Information and data sources of information on current online security threats may include:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) • Australian Competition & Consumer Commission ScamWatch • Australian Cyber Security Centre (ACSC) • Australian Signals Directorate (ASD) • business risk management resources • industry codes of practice and guidelines • organisational policies and procedures.



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BSBXCS402 Promote workplace cyber security awareness and practices

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB40220 Certificate IV in Aboriginal and Torres Strait Islander Governance BSB40320 Certificate IV in Entrepreneurship and New Business BSB50120 Diploma of Business BSB50520 Diploma of Library and Information Services
Skill sets	BSBSS00094 Cyber Security Awareness Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.3 Contribute to developing cyber security policies and procedures, and communicate to <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • colleagues • contractors / consultants • management • senior management.
2.1 Review cyber security practices according to <i>organisational policies and procedures</i>	<p>Organisational policies and procedures may include:</p> <ul style="list-style-type: none"> • escalation routes for cyber security issues • review of all devices used for work-related activities (e.g. work desktops computers, laptops, mobile devices) • password standards and requirements • privacy and security • risk management frameworks • social media standards.
Foundation Skills	Notes
Technology: Uses appropriate <i>technology platforms</i> to assist with promoting cyber security within work area	<p>Technology platforms may include:</p> <ul style="list-style-type: none"> • email • online newsletters • word processing tools • virtual meeting tools
Knowledge Evidence	Notes
<p><i>Legislative requirements</i> relating to cyber security context of performance evidence, including:</p> <ul style="list-style-type: none"> • data protection • implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws • established international legislation 	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Australian entities and the EU General Data Protection Regulation (GDPR) • Australian Privacy Principles • Privacy Act 1988 • Notifiable Data Breaches • Commonwealth, state and territory legislation • The Australian Prudential Regulation Authority (APRA) CPS 234.
Australian government <i>sources of information</i> on current threats	<p>Australian government sources of information on current online security threats may include:</p> <ul style="list-style-type: none"> • Australian Competition & Consumer Commission ScamWatch • Australian Cyber Security Centre (ACSC) • Australian Signals Directorate (ASD) • business risk management resources.



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BSBXCS403 Contribute to cyber security threat assessments

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00094 Cyber Security Awareness Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Identify relevant <i>organisational data security/protection policies and procedures</i>	<p>Organisational data security/protection policies and procedures may include:</p> <ul style="list-style-type: none"> • data security, protection and threat communication • compliance monitoring • escalation routes for cyber security issues • incident response policies • password standards and requirements • confidentiality, integrity, and availability • network services policies • remote lock and data wipe processes • review of all devices used for work-related activities (e.g. work desktop computers, laptops, mobile devices) • risk management frameworks • social media standards.
3.2 Support the communication of cyber security threat assessment outcomes and recommendations to <i>required personnel</i>	<p>Required personnel may include:</p> <ul style="list-style-type: none"> • colleagues • contractors / consultants • management • senior management.
Knowledge Evidence	Notes
<p><i>Legislative requirements</i> relating to contributing to cyber security threat assessments, including:</p> <ul style="list-style-type: none"> • data protection • implications of Notifiable Data Breach legislation on an organisation and other associated Australian privacy laws • established international legislation 	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> • Australian entities and the EU General Data Protection Regulation (GDPR) • Australian Privacy Principles • Privacy Act 1988 • Notifiable Data Breaches • Commonwealth, state and territory legislation • The Australian Prudential Regulation Authority (APRA) CPS 234.
Assessment Conditions	Notes
<p><i>Information and data sources</i> relating to cyber security</p>	<p>Information and data sources of information on current online security threats may include:</p> <ul style="list-style-type: none"> • Australian Bureau of Statistics (ABS) • Australian Competition & Consumer Commission ScamWatch • Australian Cyber Security Centre (ACSC) • Australian Signals Directorate (ASD) • business risk management resources • industry codes of practice and guidelines • organisational policies and procedures.



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BSBXCS404 Contribute to cyber security risk management

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	BSBSS00094 Cyber Security Awareness Skill Set	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult with <i>stakeholders</i> to determine scope of risk management appropriate to organisation and industry	Stakeholders may include: <ul style="list-style-type: none"> internal stakeholders (e.g. senior management, management, relevant internal specialists) external stakeholders (e.g. consultants, industry associations)
2.1 Support communication of approved risk management strategies to <i>required personnel</i>	Required personnel may include: <ul style="list-style-type: none"> colleagues contractors / consultants management senior management.
Assessment Conditions	Notes
<i>Information and data sources</i> relating to cyber security	Information and data sources of information on current online security threats may include: <ul style="list-style-type: none"> Australian Bureau of Statistics (ABS) Australian Competition & Consumer Commission ScamWatch Australian Cyber Security Centre (ACSC) Australian Signals Directorate (ASD) business risk management resources industry codes of practice and guidelines organisational policies and procedures.



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BSBXCS405 Contribute to cyber security incident responses

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
2.1 Escalate cyber security incident with <i>required workplace personnel</i> according to organisational policies and procedures	<p>Required workplace personnel may include:</p> <ul style="list-style-type: none"> management relevant internal department (e.g. information technology [IT] services) supervisor.
2.2 Consult with required internal and external <i>stakeholders</i> on communication needs relating to cyber security incident	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> external stakeholders (e.g. customers and clients, government bodies and regulators, industry associations, cyber security specialists) internal stakeholders (e.g. senior management, IT department, industrial relations team, government liaison individuals).
2.3 Assist in alerting <i>required external parties</i> according to legislative requirements and organisational procedures	<p>Required external parties may include:</p> <ul style="list-style-type: none"> Australian Competition & Consumer Commission ScamWatch Australian Cyber Security Centre (ACSC) Australian Signals Directorate (ASD) customers and clients industry associations and bodies.
Knowledge Evidence	Notes
Legislative requirements relating to contributing to cyber security incident responses, including: <ul style="list-style-type: none"> data protection implications of notifiable data breach legislation on an organisation and other associated Australian privacy laws established international legislation 	<p>Legislative requirements may relate to:</p> <ul style="list-style-type: none"> Australian entities and the EU General Data Protection Regulation (GDPR) Australian Privacy Principles Privacy Act 1988 Notifiable Data Breaches Commonwealth, state and territory legislation The Australian Prudential Regulation Authority (APRA) CPS 234.
<i>Procedures for developing communications plans</i>	<p>Procedures for developing communications plans may relate to:</p> <ul style="list-style-type: none"> external communications plans (e.g. media releases, public release statements, reports) internal communications plans (e.g. bulletins, meetings, screensaver reminders, emails).



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BSBXDB301 Respond to the service needs of customers and clients with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Identify and access <i>available supports, facilities or resources</i> within scope of own role and according to <i>organisational procedures</i> , as required to service individual customers or clients	<p>Available supports, facilities and resources are likely to include those within own organisation, as required by the individual customers or clients.</p> <p>Supports may relate to:</p> <ul style="list-style-type: none"> emotional physical social. <p>Facilities may include:</p> <ul style="list-style-type: none"> adjustable workstations automatic opening doors lift access handrails ramps. <p>Resources may include:</p> <ul style="list-style-type: none"> flashcards technology.
Interact through the use of <i>assistive communication devices</i> as directed by individual customers, support persons or specialist support providers	<p>Clients or customers will be using the assistive communication devices to interact.</p> <p>Assistive communication devices may also relate to:</p> <ul style="list-style-type: none"> augmentative and alternative communication (AAC) technology-based devices (e.g. tablets with specialised communication apps, speech output devices, speech generating devices, electronic AAC systems).
Refer to additional <i>service providers</i> to meet more complex individual customer or client needs	<p>Service providers may include:</p> <ul style="list-style-type: none"> government disability services state-based and national support organisations and support service providers support workers external to the organisation.



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BSBXDB301 Respond to the service needs of customers and clients with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
Features of <i>the social model of disability</i> as compared to the <i>medical model</i>	<p>The social model of disability recognises the socially constructed barriers that can impede equal participation, including:</p> <ul style="list-style-type: none"> attitudinal / societal (e.g. assumptions of inability, bullying, discrimination) communication (e.g. use of technical language, videos without captioning) environmental / physical (e.g. lack of accessibility such as poor lighting, doorways that are too narrow) institutional barriers (e.g. organisational policies not allowing support dogs, inaccessible public transport). <p>Conversely, the medical model refers to disability as a health condition.</p>
Different communication methods and techniques that can be employed when interacting with customers or clients, including: <ul style="list-style-type: none"> at least two augmentative and alternative communication techniques <i>appropriate to the service context and purpose of interaction</i> 	<p>Appropriate to the service context and purpose of interaction may relate to:</p> <ul style="list-style-type: none"> the AAC devices, systems, strategies, techniques or tools that are preferred by the customer or client.
<i>Inclusive language</i> and person-first expressions to use when communicating with, or about, customers or clients with disability	<p>Inclusive language may relate to:</p> <ul style="list-style-type: none"> avoiding euphemisms confirming with peak organisations, industry bodies, government support providers and the customer or client the preferred expressions and language to use using a customer or clients name, not impairment, as their main descriptor.



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BSBXDB301 Respond to the service needs of customers and clients with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30120 Certificate III in Business BSB30220 Certificate III in Entrepreneurship and New Business BSB30420 Certificate III in Library and Information Services
Skill sets	N/A	

Unit of Competency Interpretation Summary

Assessment Conditions	Notes
<i>Organisational guidelines and codes of practice</i> for provision of service to customers or clients with disability	Organisational guidelines and codes of practice may relate to: <ul style="list-style-type: none">accessibility standards, including the Web Content Accessibility GuidelinesDisability Discrimination Act 1992Fair Work Act 2009industry guidelines and codes of practice.



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BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Consult with <i>relevant management personnel</i> to determine workplace recruitment needs and position requirements	<p>Relevant management personnel may include:</p> <ul style="list-style-type: none"> employee and industrial relations representatives human resources senior management team leaders.
3.1 Design an interview guide and questions that can be presented in <i>various formats</i> , which reflect job role requirements and <i>anti-discrimination standards</i>	<p>Anti-discrimination standards may relate to:</p> <ul style="list-style-type: none"> accessibility requirements (e.g. support of an Auslan interpreter, immersive or screen readers) Disability Discrimination Act 1992 standards questions relating to the requirements of the job role.
Foundation Skills	Notes
Reading: Identifies and analyses <i>complex texts</i> to determine legislative, regulatory and business requirements	<p>Complex texts may include:</p> <ul style="list-style-type: none"> legislation (as outlined under 'legislative requirements') organisational policies and procedures.
Navigate the world of work: Recognises and adheres to <i>legislative requirements, workplace protocols, policies and procedures associated with the hiring process</i>	<p>Legislative requirements may include:</p> <ul style="list-style-type: none"> Disability Discrimination Act 1992 Fair Work Act 2009 state / territory anti-discrimination legislation <p>Workplace protocols, policies and procedures associated with the hiring process may relate to:</p> <ul style="list-style-type: none"> accessibility standards, including the Web Content Accessibility Guidelines standards under the Disability Discrimination Act 1992 The National Disability Strategy United Nations Convention on the Rights of Persons with Disabilities.
Knowledge Evidence	Notes
<i>The social model of disability as compared to the medical model</i>	<p>The social model of disability recognises the socially constructed barriers that can impede equal participation, including:</p> <ul style="list-style-type: none"> attitudinal / societal (e.g. assumptions of inability, bullying, discrimination) communication (e.g. use of technical language, videos without captioning) environmental / physical (e.g. lack of accessibility such as poor lighting, doorways that are too narrow) institutional barriers (e.g. organisational policies not allowing support dogs, inaccessible public transport). <p>Conversely, the medical model refers to disability as a health condition.</p>



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BSBXDB401 Develop and implement recruitment processes that are inclusive of people with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50320 Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<i>Inclusive language and person-first expressions</i> to use when communicating with, or about, people with disability	Inclusive language may relate to: <ul style="list-style-type: none">• avoiding euphemisms• confirming with peak organisations, industry bodies, government support providers and the customer or client the preferred expressions and language to use• using a customer or clients name, not impairment, as their main descriptor.



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BSBXDB501 Support staff members with disability in the workplace

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB40120 Certificate IV in Business BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
3.2 Refer to <i>additional support providers and specialists</i> , where required support is beyond the scope of own role	<p>Additional support providers and specialists may include:</p> <ul style="list-style-type: none"> government disability services state-based and national organisations, peak bodies, associations and support service providers support specialists internal or external to the organisation (e.g. Auslan interpreters).
3.3 Advise other relevant staff of their role in providing <i>additional support</i> to individual staff members	<p>Advising other relevant staff of their role in providing additional support may relate to:</p> <ul style="list-style-type: none"> diversity and inclusion policies and procedures organisational protocols privacy, confidentiality and dignity requirements (e.g. ensuring information shared is consensual and appropriate) training and professional development requirements of relevant staff to provide additional support. <p>Other relevant staff may include:</p> <ul style="list-style-type: none"> administration colleagues management other departments within an organisation team leaders.

Foundation Skills

Navigate the world of work: Recognises and follows *legislative requirements, organisational protocols, policies and procedures* relevant to own role

Notes

Legislative requirements may include:

- [Disability Discrimination Act 1992](#)
- [Fair Work Act 2009](#)
- state / territory anti-discrimination legislation.

Organisation protocols, policies and procedures may be for:

- accessibility standards
- diversity and inclusion
- modifications or supports for staff members
- confidentiality, privacy and dignity for staff members.

Knowledge Evidence

Inclusive language and person-first expressions to use when communicating with, or about, staff members with disability.

Notes

Inclusive language may relate to:

- avoiding euphemisms
- confirming with peak organisations, industry bodies, government support providers and the customer or client the preferred expressions and language to use
- using a customer or clients name, not impairment, as their main descriptor.



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BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Performance Criteria	Notes
1.1 Assess current organisational compliance with <i>accessibility legislation and standards</i>	<p>Accessibility legislation and standards may include:</p> <ul style="list-style-type: none"> • Disability Discrimination Act 1992 and associated standards • Fair Work Act 2009 • state / territory anti-discrimination legislation • The National Disability Strategy • United Nations Convention on the Rights of Persons with Disabilities • Web Content Accessibility Guidelines.
2.2 Seek feedback from <i>internal and external stakeholders</i> to confirm viability of proposed access solutions	<p>Stakeholders may include:</p> <ul style="list-style-type: none"> • internal stakeholders (e.g. human resources representatives, work health and safety (WHS) representatives, workers, managers, team leaders) • external stakeholders (e.g. government disability services, state-based and national organisations, peak bodies, associations and support service providers, support specialists, WHS specialists).
Performance Evidence	Notes
Apply the <i>Principles of Universal Design</i> to the environmental and operational aspects of an organisation	<p>Principles of Universal Design may include:</p> <ul style="list-style-type: none"> • equitable use • flexible use • simple and intuitive use • perceptible information • tolerance for error • low physical effort • size and space for approach and use.



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BSBXDB502 Adapt organisations to enhance accessibility for people with disability

Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB50120 Diploma of Business BSB50220 Diploma of Aboriginal and Torres Strait Islander Governance BSB50420 Diploma of Leadership and Management BSB60120 Advanced Diploma of Business BSB60320 Advanced Diploma of Human Resource Management
Skill sets	N/A	

Unit of Competency Interpretation Summary

Knowledge Evidence	Notes
<p><i>Features of the social model of disability as compared to the medical model</i></p>	<p>The social model of disability recognises the socially constructed barriers that can impede equal participation, including:</p> <ul style="list-style-type: none"> attitudinal / societal (e.g. assumptions of inability, bullying, discrimination) communication (e.g. use of technical language, videos without captioning) environmental / physical (e.g. lack of accessibility such as poor lighting, doorways that are too narrow) institutional barriers (e.g. organisational policies not allowing support dogs, inaccessible public transport). <p>Conversely, the medical model refers to disability as a health condition.</p>
<p><i>Assistive technologies, design developments and solutions that can help address access needs</i></p>	<p>Assistive technologies may include:</p> <ul style="list-style-type: none"> augmentative and alternative communication (AAC) devices, systems, strategies, techniques or tools electric wheelchairs eye scanners software. <p>Design developments and solutions may relate to:</p> <ul style="list-style-type: none"> Principles of Universal Design physical solutions (e.g. lights installed to signify evacuations) new and innovative technologies social solutions (e.g. layout of a workspace in relation to entrances and exits).



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BSBWHS332X Apply infection prevention and control procedures to own work activities

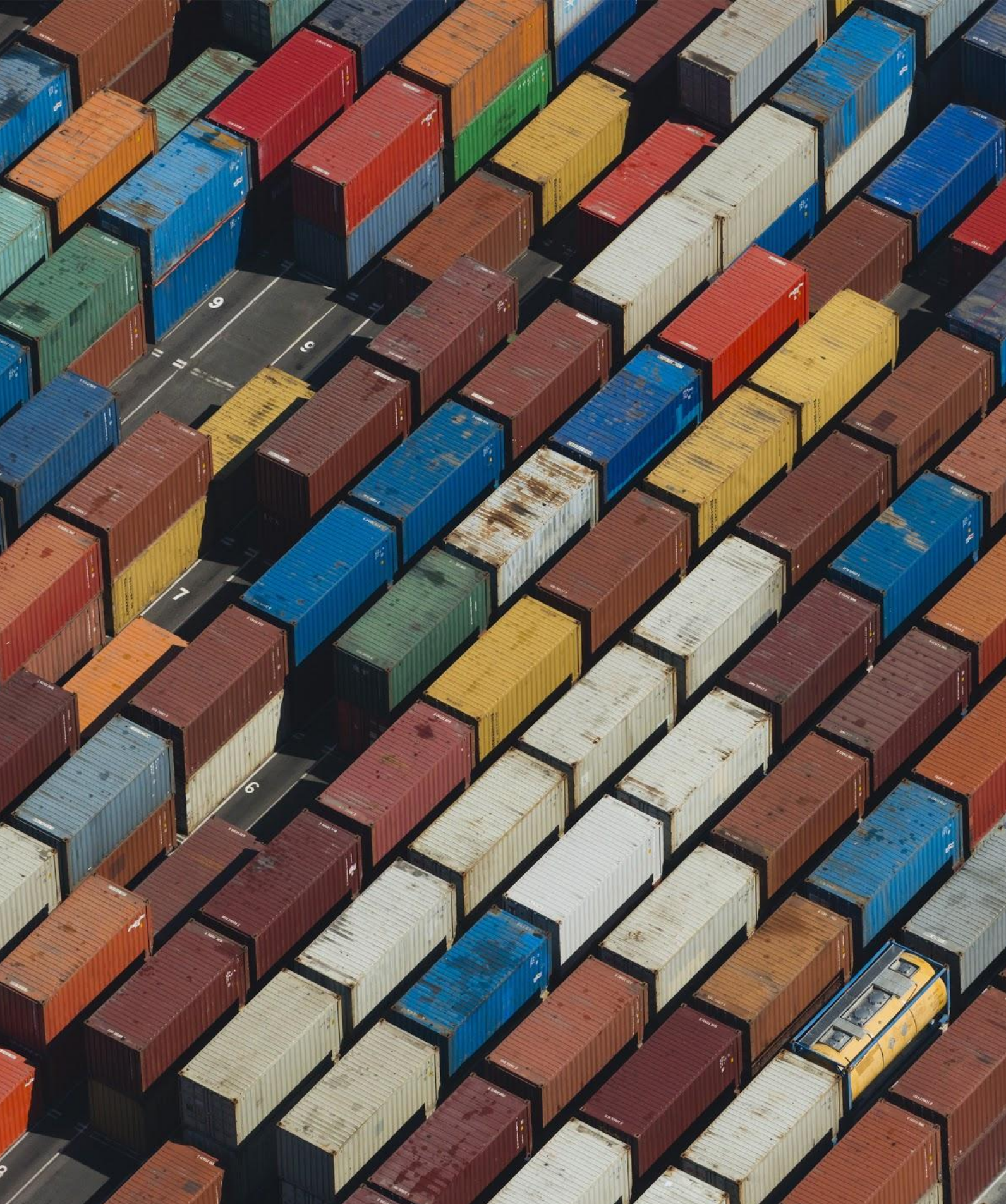
Unit of Competency use in the BSB Training Package

	Core unit	Elective unit
Qualifications	N/A	BSB30115 Certificate III in Business BSB30719 Certificate III in Work Health and Safety Certificate III in Work Health and Safety
Skill sets	BSBSS00095 Cross-Sector Infection Control Skill Set	

Unit of Competency Interpretation Summary

For detailed and industry-specific interpretation and contextualisation guidance on '[BSBWHS332X Apply infection prevention and control procedures to own work activities](#)', please refer to the following resources:

- [Business Services - Infection Control Contextualisation Guidance](#)
- [Construction and Property Services - Infection Control Contextualisation Guidance](#)
- [Domestic Travel - Infection Control Contextualisation Guidance](#)
- [Education - Infection Control Contextualisation Guidance](#)
- [Entertainment and Amusement - Infection Control Contextualisation Guidance](#)
- [Hair and Beauty - Infection Control Contextualisation Guidance](#)
- [Mining, Drilling and Civil Infrastructure - Infection Control Contextualisation Guidance](#)
- [Sports and Recreation - Infection Control Contextualisation Guidance](#)
- [Weddings, Funerals and Religious Services - Infection Control Contextualisation](#)
- [Cafes, Restaurants and Accommodation - Infection Control Contextualisation Guidance.](#)



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