**CHCINF1A Process and provide information**

Correctly handling organisational information including incoming and outgoing communications and enquiries.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</thead>
</table>
| 1. Process and prepare information | • incoming and outgoing information and correspondence is managed according to organisational procedures  
• enquiries are responded to promptly and according to established procedures  
• information is provided to other staff when relevant |
| 2. Store and maintain information | • information is kept in accordance with organisational guidelines  
• access to information is provided to appropriate staff  
• confidentiality and security of information is maintained  
• breaches of confidentiality are reported to supervisor or management |
| 3. Provide prepared information to promote access to services | • the range of client services available is identified including the service provided by the organisation  
• prepared information or details of a range of services are provided to clients when required  
• where appropriate, specialist information, advice and assistance is sought from supervisor on behalf of client  
• problems relating to providing information about services are referred to supervisor |

**Range of variables**

*Information includes:*
- internal and external communications including:
  - telephone calls
  - facsimiles
  - letters
  - email
- publications
- internal office procedures
- personal visits

*Organisational procedures and policies include those relating to:*
- filing and indexing
- security
- circulation
- confidentiality

*Storage and recording mechanisms may be:*
- paper based or
- electronic

*Prepared information may be:*
- pamphlets on services
- literature
Evidence Guide

**Critical aspects of assessment:**
- relevant policies, guidelines and procedures of the organisation/service relating to organisational information are followed

**Underpinning knowledge:**
- organisational policies and procedures for security and circulation
- recording mechanisms
- organisational policies and procedures for incoming and outgoing mail
- locations and titles of personnel
- Australia Post specifications for mail
- confidentiality requirements

**Underpinning skills:**
- use of information systems and technology
- oral communication skills required to fulfil the job role in the organisation/service. Oral skills may include listening to enquiries to providing simple factual information relevant to the workplace and client group. Language used may be English or community language depending on the client group
- literacy competence required to fulfil the procedures of the organisation/service, and according to the support available in the workplace. Writing skills may range from the need to fill out a simple form to completion of a short report. Reading skills may range from understanding the names on envelopes/correspondence to reading pamphlets to determine their relevance to an enquiry
- numeracy competence required to fulfil the procedures of the organisation/service, and according to the support available in the workplace. Numeracy tasks may range from the need to count supplies to recording information on an organisational form

**Resource implications:**
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

**Consistency in performance:**
- assessment may include observations, questioning and evidence gathered from the workplace environment
- assessment may be conducted on one occasion but must include the normal range of workplace situations regarding handling of organisational information

**Context of assessment:**
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCINF2A Maintain organisation’s information systems

Collecting, storing and providing accurate and current information to clients.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Maintain accurate records</td>
<td>• information needs of clients and key stakeholders are identified and options for meeting them are negotiated with client and other relevant people&lt;br&gt;• records and information are updated and maintained in accordance with organisational procedures and breaches are reported to supervisor or management&lt;br&gt;• appropriate and relevant sources of information are identified and accessed so the organisation is able to provide information relevant to its service delivery&lt;br&gt;• specific information, including client assessment and referral records is maintained in accordance with organisational procedures and consideration of confidentiality&lt;br&gt;• reports are prepared and presented to the required standard</td>
</tr>
<tr>
<td>2. Handle organisational correspondence</td>
<td>• incoming correspondence is dealt with according to established organisational guidelines&lt;br&gt;• outgoing correspondence is prepared and dispatched in accordance with organisational procedures</td>
</tr>
<tr>
<td>3. Provide information as required</td>
<td>• information is collected, indexed and maintained in accordance with organisational procedures and requirements and to assure its currency and relevance&lt;br&gt;• required information is prepared and presented in a manner appropriate to the audience and the purpose and is consistent with organisational procedures&lt;br&gt;• client statistics, inquiries and other data are collected and maintained as required&lt;br&gt;• appropriate processes are utilised to undertake data handling and processing to satisfy workplace needs</td>
</tr>
</tbody>
</table>

Range of Variables:

Clients may include:
- individual members of the public
- family members and significant others
- referred or self referred

Records and reports may be verbal or written, according to the requirements of the job and may include:
- client information
- internal forms including:<br>  ◊ time sheets<br>  ◊ work sheets<br>  ◊ correspondence incoming/outgoing<br>  ◊ petty cash forms<br>  ◊ reports for organisation and/or funding bodies<br>  ◊ equipment usage report<br>  ◊ financial statements<br>  ◊ funding submissions<br>  ◊ organisational policies and procedures manual
Correspondence may include:
- mail
- facsimiles
- email
- memos
- messages
- internal reports
- organisational newsletters

Information includes all that may be required for the effective operation of the organisation, including:
- details of relevant service provider, government agencies and funding sources
- details on the range of services provided by the organisation
- relevant government and organisational policies, legislation, statutory requirements
- client details
- network information
- professional development material
- data collected about clients or organisational operations

Processes for interpreting and analysing data include:
- relevant numerical calculations

Evidence Guide:

Critical aspects of assessment:
- worker maintains accurate and up to date records
- worker demonstrates ability to provide information when it is required

Underpinning knowledge:
- use of relevant information technology
- relevant guidelines and policies of organisation
- government legislation and program guidelines
- operation procedures for use of office technology
- confidentiality requirements

Underpinning skills:
- communication skills as required to provide instruction and support
- basic operational numeracy skills related to straightforward data

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace eg. viewing of information and storage system, collected data etc.
- assessment may be take place on one occasion

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCINF3A Coordinate information systems

Coordinating all aspects of information management including: collection, collation, storage and preparation of information in different formats depending on client needs.

<table>
<thead>
<tr>
<th>Element</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1. Gather and record information</td>
<td>• the appropriate information is identified, accessed and collected in order to meet: ◊ client needs ◊ specific workplace needs ◊ organisational needs • all processes and procedures promote: ◊ confidentiality ◊ security ◊ integrity of the information • information is collated, prioritised and stored according to the purpose of the record and established procedures • information gathered is relevant, accurate and consistent with the organisation’s values and client needs</td>
</tr>
<tr>
<td>2. Prepare and present reports</td>
<td>• reports prepared meet: ◊ audience/client needs ◊ standard reporting protocols and procedures ◊ organisational criteria • conclusions and recommendations included in reports are clearly supported by the information gathered and verifiable evidence • in preparing reports, appropriate technology is used within the operator’s level of expertise and within established guidelines that promote safe working conditions for self and others • reports are circulated to key people and their feedback is assessed for relevance and incorporated into the report • reports are presented to appropriate person/s for implementation in accordance with organisational guidelines</td>
</tr>
<tr>
<td>3. Supervise processes for collection, use, storage and dissemination of information</td>
<td>• issues arising from day to day operation of information systems are monitored and solutions are developed cooperatively • appropriate training opportunities are provided for staff to ensure effective use of relevant technology • where appropriate advice on complex areas of information is provided • processes for dealing with information requests and exchanges are developed</td>
</tr>
</tbody>
</table>

Range of variables

Information may be sought from:
• written sources
• individuals, including:
  ◊ stakeholders
  ◊ team members
  ◊ specialists
  ◊ family, support network
• group meetings
• other agencies
• clients

Reports may be:
• log books
• administration files
• timesheets
• expenses
• client reports/case notes
• incident reports
• court reports
• reports to funding, policy or legal bodies
• reports to case management conferences

Relevant people will include:
• inside the organisation
• specialist organisations
• community groups/leaders
• team members
• family and support networks of clients
• external organisations

Evidence Guide

Critical aspects of evidence:
• worker demonstrates ability to collect, collate and store information
• worker demonstrates ability to prepare and present information in a range of formats that meets the needs of the client

Underpinning knowledge:
• available sources of information
• organisation polices and procedures relating to reporting and records systems
• research methods and information gathering
• interviewing methods
• the range of report writing which is required of the organisation for internal and external purposes
• appropriate documentation required for specific types of reporting

Underpinning skills:
• report writing
• a range of oral and written communication skills
• research

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace eg. prepared reports etc.
• assessment may be conducted on one occasion but must include assessment of the normal range of information and presentation of information

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCINF4A Manage the organisation's information systems

Coordinating information systems including as a supervisor of a work area/program.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Identify and address information requirements               | • information requirements are identified in terms of their relevance to organisation and worker goals and objectives and expected outcomes for clients  
• relevant information is collected and analysed and used to inform decision making  
• sources of relevant information are identified, utilised and periodically evaluated  
• options for information collection and dissemination are identified, evaluated and implemented so that maximum use is made of the organisation’s resources and of the community |
| 2. Supervise day to day processes for collection, use, storage and dissemination of information | • issues arising from day to day operation of information systems are elicited, monitored and verified  
• staff are provided with information about relevant policies and procedures including confidentiality, ethics and security protocols, and management is advised of any breaches  
• advice on complex information requests is provided as required  
• processes and appropriate administrative procedures for dealing with information requests and exchange are developed, implemented and evaluated  
• contribute to design of administrative procedures and policies |
### 3. Establish and manage systems to record, store, process and distribute information

- strategies are developed and implemented to ensure all aspects of information collection and storage, dissemination and disposal complies with relevant organisational and statutory requirements
- the methods used to record and store information are periodically re-evaluated for effectiveness, efficiency, security and integrity, and new methods are introduced as necessary
- any substantial breakdowns in the recording, storing and accessing of information are analysed for cause and effect, and corrective action is taken to minimise impact
- systems are established and implemented to ensure appropriate availability of information for clients and the organisation
- currency validity and usefulness of information is monitored and appropriate actions taken for disposal or storage
- the application of available technology is investigated and analysed for appropriateness to day to day and specific operations
- staff is appropriately informed about the correct use of equipment in accordance with manufacturer's specifications, and occupational health and safety guidelines
- access for staff to training and operation of current and emerging technology is investigated and integrated into planning for day to day operations
- the application of correct operating and safety procedures is monitored on a regular basis to ensure improvements to work practices and compliance with occupational health and safety and other guidelines

### 4. Support and supervise the development of information and educational resources

- guidelines for the production of educational and informational resources are developed in consultation with clients and stakeholders
- appropriate expertise is recruited to develop the designated information and educational resources to optimise their impact
- opportunities are provided for users of organisational information to advise on the development of information and educational resources
- relevant cultural considerations are incorporated in the development of information/education resources

### Range of Variables

*The contexts for managing information systems include:*

- management of a work unit/major program area

*Managing information systems will be carried out within requirements established by:*

- commonwealth and state legislation
- organisational policy and procedures
- relevant program standards
- informal and formal arrangements with government, non-government and other service providers to obtain information relating to clients and services
- computer based recording systems
• electronic banking

Financial and technological resources required for system may include:
• manual filing systems
• computerised filing software and hardware

Identifying information requirements include:
• monitoring work output and relationship with obtaining outcomes, assessing availability of statistics to assist in monitoring workload, setting up dialogue with workers/supervisors about how to improve work practices through the use of information technology

Establishing systems to obtain information includes:
• assessing available technology and its application to work practices
• identifying and preparing submissions for resources needed for new systems
• identifying training needs associated with implementation of new systems and either developing training to support this or investigation of possible training service providers

Evidence Guide

Critical aspects of assessment:
• assessing information requirements
• designing work systems that integrate technology
• designing/assessing training that will support introduction of new technology in work practices
• demonstration of knowledge related to applicable organisation and legislative requirements

Underpinning knowledge:
• application of information technology
• work analysis models/systems
• relevant policy and procedures and work systems
• systems analysis models/theories
• relevant legislation
• relevant current and emerging information technology
• consultation processes and techniques
• communication dissemination models
• occupational health and safety policies and procedures

Underpinning skills:
• assessment, review and evaluation
• analysis
• planning
• consultation/facilitation
• report writing
• application of current/emerging technology
• communication/dissemination strategies
• supervision

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment may be conducted on one occasion but must include all aspects of managing the organisations information systems
Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCINF5A Meet statutory and organisational information requirements

Ensuring the information system of the organisation is effective and efficient.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Identify information requirements | • information requirements are identified in relation to organisation and worker goals, objectives and expected outcomes  
• information needs are collected, analysed and prepared in ways to inform decision making |
| 2. Review options for systems to obtain information | • sources of information are identified and periodically evaluated  
• options for information systems are identified, evaluated and prepared in ways that users can contribute to their development  
• financial and technological resources required for systems are identified and evaluated |
| 3. Establish and manage systems to record and store information | • the methods used to record and store information are periodically re-evaluated for effectiveness, efficiency, security and integrity and new methods suggested are introduced as necessary  
• any substantial breakdowns in the methods of recording, storing and accessing information are analysed for cause and effect, and corrective action is taken  
• systems are established and implemented to ensure availability of information especially for direct use of clients  
• validity and usefulness of information is monitored and appropriate actions taken for disposal or storage |
| 4. Support and supervise the development of information and educational resources | • guidelines in terms of content and format are developed in consultation with clients and other stakeholders, for the production of educational and informational resources  
• appropriate expertise is recruited to develop the designated information and educational resources  
• opportunities are established for users of information to monitor and advise on the ongoing development of information and educational resources |
| 5. Provide staff training | • worker’s training needs in relation to the information acquisition system, information record and storage system, and the preparation of educational resources, are determined  
• training, or retraining is organised in accordance with the competency standards required, the training needs analysis and the organisation’s policy |

Range of Variables

*The contexts for managing information systems include:*  
• management of a work unit/major program area

*Managing information systems will be carried out within requirements established by:*  
• commonwealth and state legislation  
• organisational policy and procedures
• relevant program standards
• informal and formal arrangements with government, non-government and other service providers to obtain information relating to clients and services
• computer based recording systems
• electronic banking

Financial and technological resources required for system may include:
• manual filing systems
• computerised filing software and hardware

Identifying information requirements include:
• monitoring work output and relationship with obtaining outcomes, assessing availability of statistics to assist in monitoring workload, setting up dialogue with workers/supervisors about how to improve work practices through the use of information technology

Establishing systems to obtain information includes:
• assessing available technology and its application to work practices
• identifying and preparing submissions for resources needed for new systems
• identifying training needs associated with implementation of new systems and either developing training to support this or investigation of possible training service providers

Evidence Guide

Contexts for assessment:
• this unit of competence will be most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions

Critical aspects of assessment:
• assessing information requirements
• designing work systems that integrate technology
• designing/assessing training that will support introduction of new technology in work practices
• demonstration of knowledge related to applicable agency and legislative requirements processes listed in the range of variables

Underpinning knowledge:
• application of information technology
• workload analysis models/systems
• operations of the agency
• relevant policy and procedures and work systems
• systems analysis models/theories
• relevant legislation
• range of current and emerging information technology
• consultation processes and techniques
• communication dissemination models

Underpinning skills:
• assessment of information needs
• analysis
• planning
• consultation/facilitation
• report writing
• running reviews
• accessing/researching current emerging technology
• marketing technology
• communication/dissemination strategies
Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace eg. observation of recording systems, portfolios, testimonials from clients and colleagues
• assessment may be conducted on one occasion but must include all aspects of managing the organisations information systems in the workplace

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCINF6A Manage information strategically

Providing education/information about services or programs for the public.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Develop and implement strategies for collection, verification and use of information to achieve organisational objectives | • the needs of the organisation and its clients are used as the basis for developing information strategies which reflect current relevant legislation  
• guidelines and strategies are developed based on analysis of current and emerging technology to improving work practices  
• factors impacting on strategic development of information technology across the organisation are identified, analysed and addressed in planning  
• processes for consultation on the application of information technology to achieve goals and outcomes are developed and implemented |
| 2. Facilitate strategies for inter-agency information sharing and use | • high level liaison with a range of stakeholders within and outside the organisation is undertaken and integrated into planning processes  
• advice is prepared and disseminated to appropriate personnel on relevant legislation and organisation procedures relating to the collection, verification and use of information |
| 3. Monitor and upgrade organisation’s strategic management of information | • processes for periodic review of information management are identified and implemented to ensure ongoing efficiency and effectiveness  
• the effectiveness of existing procedures and systems is monitored, to determine the capacity to meet client needs and organisational aims, objectives and standards  
• required changes are implemented where appropriate and as resources permit |

Range of Variables

Managing information strategically will be carried out within requirements established by:

- Commonwealth and State legislation
- agency policy and procedures
- relevant program standards
- copyright legislation
- established community communication processes

High level liaison includes:

- negotiating information sharing arrangements with a range of government, non-government and other service providers required for client, service delivery, or program management

Evidence Guide

Critical aspects of assessment:

- analysis of organisational information needs
- development of strategies for information management across range of functions
- development of protocols for information sharing, storage, disposal across agencies
- evidence of competence requires demonstration of knowledge related to applicable agency and legislative requirements
Underpinning knowledge:
• Strategic planning models, theories and practices
• operations of government and non-government agencies
• relevant legislation
• range of stakeholders
• financial management
• marketing models/processes

Underpinning skills:
• systems analysis
• strategic planning
• preparation of high level advice

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the
  workplace
• assessment may be conducted on one occasion

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and
  under the normal range of workplace conditions
**CHCNET1A Participate in networks**

Participating in a network in order to gather information, forge links with other workers and services and to promote activities.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
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</table>
| 1. Identify and select appropriate networks | • networking needs are identified and prioritised in order to enable the organisation and the worker to optimise client service delivery  
• networks relevant to the work role, the organisation’s priorities and its target groups are identified and prioritised |
| 2. Make effective use of relevant networks | • contributions appropriate to the network are provided within the principles and resource constraints of the worker and the organisation  
• information and other support which can be provided by the network are identified and sought to optimise client service delivery  
• knowledge of the values, beliefs and perspectives of network participants is used to inform communication within the network  
• appropriate confidentiality measures are implemented to protect the client, the organisation and the network  
• ongoing participation in networks is monitored against the benefits to the worker, organisation and client group  
• outcomes in networks are reported to the worker’s own organisation and other stakeholders where appropriate |

**Range of Variables**

*Networks may be informal and include:*  
• other workers, particularly those in the community services industry  
• trainers, teachers and academics  
• contacts in policy and funding bodies

*Networks may be formal and include:*  
• local interagency networks  
• interest and support groups  
• regional, specialist and peak associations  
• professional/occupation associations

*The purposes of networks and networking may include:*  
• learning about the role, services and resources of other organisation  
• learning about the roles and resources of other workers  
• providing advice and information about own service and organisation  
• peer support and review  
• professional development  
• maintaining coordination among organisations and workers  
• supporting joint programs or activities  
• providing information for policy development  
• supporting the interests of young people
Evidence Guide

Critical aspects of evidence:
- participation in both formal and information network
- participate in a network as a member not representing an organisation
- participate in a network as a representative of the workers' own organisation

Underpinning knowledge and skills:
- oral communication skills including asking questions, listening to information, providing information. Assessors should particularly look for workers engaging in interpersonal exchanges, clarifying meaning and maintaining interaction, for the purposes of establishing, and maintaining relationships; exploring issues; and problem solving. Assessors should also look for the ability to elicit and give factual information and opinions

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace environment
- assessment may be conducted on one or more occasions but must include a range of network types relevant to the workplace

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCNET2A Maintain effective networks

Establishing and maintaining formal and informal groups which directly impact on the effective operation of the organisation.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
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</table>
| 1. Develop cooperative working relationships and strategic alliances with other organisations | • information about relevant services, organisations, and key people is gathered and stored so it is up to date and accessible  
• information about own service is provided to other organisations on request, and liaison with staff from relevant organisations occurs on a formal and informal basis to optimise client service delivery  
• wherever possible, sharing of resources with other organisations to overcome duplication in service delivery is carried out |
| 2. Represent the organisation | • a positive image of the organisation is promoted at every available opportunity  
• issues, policies and practices of the organisation are effectively communicated to a range of audiences in an appropriate format  
• complaints about services are handled in accordance with the organisation's procedures |
| 3. Maintain networks | • networks and other work relationships are maintained to provide identifiable benefits for clients and the organisation  
• appropriate time and effort is applied to establishing and maintaining networks which assist achievement of work outcomes  
• protocols for communication between network participants and services are followed including those relating to confidentiality  
• advocacy is provided to develop working relationships between client and other organisations/agencies  
• cultural considerations within operation of networks are identified and integrated into communication processes |

Range of Variables:

Groups to which the organisation is promoted include:
• internal and external clients  
• professional networks  
• managers  
• funding bodies  
• political groups  
• community groups and associations

Networks include:
• formal and informal groups which are directly related to work activities or which make a valuable contribution to effective performance
Evidence Guide

Critical aspects of assessment:
• maintaining a network of formal and informal groups relevant to the work situation
• ability to represent organisation in both formal and informal settings in a positive manner

Underpinning knowledge:
• approaches to networking
• relevant organisations and services
• funding bodies and lines of contact
• relevant key bodies/individuals
• marketing techniques applicable to the service or organisation
• communication techniques
• communication and interpersonal

Underpinning skills:
• promotion
• networking
• negotiation

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment may be take place on one occasion but must include a range of group settings/networks

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCNET3A Develop new networks

Setting up formal networks which will benefit the organisation and the clients.

<table>
<thead>
<tr>
<th>Elements</th>
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</table>
| 1. Develop and maintain appropriate networks | • organisational, professional and Individual networking needs are identified, prioritised and appropriate new networks are established as required to meet client needs and organisational objectives  
• significant cultural practices, needs and traditions are incorporated into the networking strategy and its development  
• strategies to develop effective new networks are implemented in consultation with key people and in accordance with organisational objectives  
• information about new network is made available to other staff and others as appropriate  
• processes for engaging relevant community members in collection and dissemination of information are developed and implemented as appropriate to ensure effective operation of the network |
| 2. Reflect social and cultural awareness in developing and maintaining networks | • potential discrimination or culturally based obstacles to effective networks are identified and strategies to avoid them are developed and implemented  
• cultural differences and diversity are valued as a resource in networks and integrated into practices, relationships and strategies wherever relevant  
• where individual relationships interfere with the effective operation of networks, timely remedial action is taken in accordance with organisational procedures, to ensure maximum benefit to clients  
• effectiveness and relevance of networks is regularly evaluated against organisational goals and client needs in consultation with key people, and appropriate modifications are made as necessary  
• evaluation of the effectiveness of networks includes consideration of issues related to cultural expectations, client needs and organisation's philosophy |

### Range of Variables:

*Formal networks may include:*

- key people
- local organisations
- interest and support groups
- lobby groups
- regional specialist and peak associations
- advisory committees
- associations
- businesses
- law enforcement agencies
- government ministers/departments
Networks may serve the purpose of:
• achieving corporate objectives
• accessing the services and resources of other organisations
• promotion of organisation and/or programs
• strategic planning
• encouraging coordination amongst organisations and workers
• enhancing service delivery

Networking needs may be as a result of, or leading to:
• new government policies
• new or reviewed strategic plan
• new organisations/services starting up
• restructuring of organisation
• enhanced service delivery
• funding imperatives

Strategies for the development of new networks may include:
• liaison with relevant government, community, business and other representatives
• participating and managing formal network committees
• negotiating with relevant organisations for network participation
• liaison with other network organisations

Evidence Guide

Critical aspects of assessment:
• networks developed meet the needs of the organisation and its clients

Underpinning knowledge:
• power relationships within and between organisations
• the values and limitations of networks
• the dynamics of networks
• processes of initiating and supporting community development planning
• strategic planning
• existing relevant networks
• lobbying in the context of organisational protocols

Underpinning skills:
• negotiation
• reporting and record keeping
• lobbying
• dealing with diverse and/or specific cultural groups

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment may take place on one occasion

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG1A Follow the organisation’s policies, procedures and programs

<table>
<thead>
<tr>
<th>Elements</th>
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</table>
| 1. Follow organisational guidelines | • workplace instructions and policies are followed  
• organisational programs and procedures are supported within the job role  
• organisational resources are used for the purpose intended  
• clarification is sought and obtained when necessary |
| 2. Work ethically | • decisions and actions are within the job description and are consistent with the organisational philosophy  
• prompt and consistent performance of duties is applied to all workplace activities  
• inappropriate gifts are not accepted  
• client resources and possessions are used for the purpose intended  
• care is taken to behave in a reasonable and careful manner at all times  
• confidentiality is maintained  
• difficulties in carrying out duties are reported to appropriate person/supervisor |

Range of variables

Organisational guidelines relevant to work role may include those relating to:
• administrative systems of the workplace including: filing; record keeping; workplace programs and timetable management systems; use of equipment; staff rosters  
• workplace agreements  
• job descriptions  
• occupational health and safety  
• grievance procedures  
• confidentiality requirements  
• appropriate relationships with clients  
• gifts and gratuities

Workplace instructions and policies may be:
• written or verbal

Reports may be:
• notes  
• memos  
• records  
• letters  
• reports via phone  
• face-to-face reports

Evidence Guide

Critical aspects of assessment:
• relevant policies, protocols, guidelines and procedures of the organisation in relation to workers activities are followed
**Underpinning knowledge:**
- organisational policies, procedures and programs relating to the work role
- organisational occupational health and safety policies and procedures
- organisational philosophy

**Underpinning skills:**
- language, literacy and numeracy competence appropriate to the requirements of the organisational policies and procedures. This may vary from listening skills when workplace instructions are delivered verbally, to reading skills when worker has to refer to an instruction manual. Language used may be English or community language

**Resource implications:**
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

**Consistency in performance:**
- assessment may include observations, questioning and evidence gathered from the workplace environment
- assessment may be conducted on one occasion but must include normal range of workers’ activities

**Context of assessment:**
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCOR2A Work with others

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Plan own workload with supervisor | • assistance and direction is actively sought as required  
• sequence of tasks is planned with supervisor  
• strategies to cope with unexpected demands are developed with supervisor |
| 2. Communicate with others about work matters | • information relevant to the work is shared with co workers  
• communication is clear, concise and focused on the issue  
• opinions and suggestions of others are listened to appropriately  
• workplace procedures are used to address concerns |
| 3. Work cooperatively with others | • different roles and responsibilities are identified and respected  
• rights of other workers are respected  
• work area is kept well organised and safe in accordance with relevant standards/policies  
• assigned tasks are completed according to planned workload |

### Range of variables

Co workers may include:
- other staff
- unpaid workers
- students on placements
- resources workers
- ancillary staff
- staff from other related organisations/agencies

*Information which could be communicated with co workers includes:*
- suggestions about the service
- equipment or materials required
- relevant information about a client
- opinions and suggestions

Communication may be in:
- English
- community language as required by the workplace

Workloads may be recorded in the following manner:
- on whiteboards
- on rosters
- in diaries
- in verbal instructions

### Evidence Guide

Critical aspects of assessment:
- knowledge of and adherence to own and others roles and responsibilities in the workplace
- work cooperatively with other workers
Underpinning knowledge:
- roles and responsibilities of self and others in the workplace
- grievance procedures of the organisation
- worker's rights and responsibilities as outlined in awards, workplace agreements, legislation etc.
- working conditions as outlined in award, workplace agreement, policy manuals etc.

Underpinning skills:
- ability to work with others cooperatively
- positive communication skills including active listening and appropriate use of body language
- language, literacy and numeracy competence appropriate to the requirements of the organisation, job role and client group. Assessors should look for language skills such as asking questions, clarifying, listening for instructions. Language used may be English or a community language

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- assessment may be conducted on one occasion but must include the worker interacting and co operating with the normal range of other workers from the workplace

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCORG3A Participate in the work environment

Working effectively as an individual and in work groups to contribute to achievement of organisational objectives.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Contribute to the effective operation of the workgroup | • job responsibilities of the worker and their contribution to service delivery is identified  
• work is carried out within defined job role and responsibilities  
• assistance and direction is sought and obtained as required  
• work complements that of others according to policies and rules of workplace practice  
• activities are completed to the standard expected in the workplace  
• carries out set tasks in a positive and courteous manner  
• resources needed to carry out own work duties are identified  
• shortages of resources are dealt with according to organisational practices  
• work area is kept well organised and safe in accordance with relevant standards/policies |
| 2. Review and develop own work performance | • own work is monitored according to requirements for job quality and customer service  
• work requirements unable to be met are reported to supervisor  
• a need for additional support to improve performance is communicated clearly to supervisor/appropriate person  
• need for training is reported to supervisor, if required  
• where appropriate, training is undertaken  
• support and supervision opportunities are undertaken as required |
| 3. Work cooperatively with others | • problem solving is used when necessary so that work is completed according to organisational policies and practices  
• workplace relationships respect individual differences of workers  
• different roles and responsibilities are identified and respected  
• displays appropriate behaviour in the workplace likely to promote cooperation  
• information is shared with others in order to complete set activities  
• conflicts in the workplace are reported to supervisor |
| 4. Contribute to the development of policies, practices and structures of an organisation | • concerns regarding administrative policies, practices and procedures are reported to supervisor  
• concerns regarding job responsibilities are reported to supervisor  
• information, ideas and suggestions are provided to supervisor when requested  
• participate in staff meetings/working groups, if required |
Range of Variables

The contexts for working with others include:
• full time, part time, casual employee of an organisation government, non government
• working within a voluntary capacity for an organisation

Working with others will be carried out within requirements established by:
• state and commonwealth legislation
• organisational policy and procedures
• relevant program standards

Organisational requirements/constraints may include:
• time
• money
• other resources

Resources may be:
• linen supplies
• pamphlets
• cleaning equipment
• office supplies

Organisational practices dealing with shortages of resources may include:
• telling a supervisor
• ordering more supplies

Reports to supervisors may be:
• provided in person or by telephone
• through discussion
• provided in writing or using workplace forms eg, memos, notes
• email and electronic transfers

Communicating the need for additional support may be:
• in writing according to organisational practices
• conveyed in verbal exchanges
• during meetings

Information shared with others may be:
• by note/message/memo
• in person or by phone
• email and electronic transfers

Policies, practices and procedures include those relating to:
• equal employment opportunity
• occupational health and safety
• workplace harassment
• grievance resolution
• first aid
• infection control
• workplace behaviour

Evidence Guide

Critical aspects of assessment:
• work is carried out within own role, responsibilities and organisational objectives in an effective manner
• worker interacts with both individuals and work groups in a co operative manner
Interdependent assessment of units:
• assessment will be in conjunction with all other compulsory units in the package

Underpinning knowledge:
• organisational mission, philosophy, organisation structure, policies and procedures
• legislation relevant to organisation and work carried out, including occupational health and safety

Underpinning skills:
• awareness and understanding of effective teams operation
• time management and work planning
• basic negotiation
• effective communication and interpersonal skills

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace environment, especially testimonials from colleagues
• assessment is recommended to be conducted on more than one occasion or information for assessment gathered over time
• assessment must include working with both individuals and work groups in the organisation/service

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG4A Follow the organisation's occupational health and safety policies

Applying relevant occupational health and safety legislation and codes of practice, including duties and responsibilities for all parties under the general duty of care and capacity to render first aid as required.

<table>
<thead>
<tr>
<th>Element</th>
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</tr>
</thead>
</table>
| 1. Follow workplace procedures for hazard identification and risk control | • hazards in the work area are recognised and reported to supervisor according to workplace procedures  
• workplace procedures and work instructions for controlling risks are followed accurately  
• workplace procedures for dealing with accidents, fires and emergencies are followed where necessary |
| 2. Contribute to the management of occupational health and safety | • occupational health and safety issues are raised with designated personnel and co workers as appropriate  
• contributions are made as appropriate to workplace occupational health and safety discussions |
| 3. Utilise and implement strategies as directed to prevent infection in the workplace | • the environment is kept clean and tidy in accordance with organisational procedures  
• personal hygiene practices as laid down by legislation and the organisation, are followed  
• any items which may be contaminated, are disposed of according to organisational procedures and guidelines  
• universal precautions are followed |
| 4. Utilise strategies to prevent stress overload | • nominated rest time and breaks are followed  
• sources of stress are identified and issues raised with supervisor  
• work roles are clarified and followed |
| 5. Work in a safe manner | • defined procedures are followed to ensure personal safety  
• all work is carried out in a manner which ensures personal safety  
• organisational security measures are followed  
• manual handling procedures are followed |

Range of Variables:

This unit is based on the National Guidelines for Integrating Occupational Health and Safety Competencies into National Industry Competency Standards [NOHSC: 7025 1994]

Reports identifying workplace hazards may be verbal or written and may include:

• memos
• specially designed report forms
• phone messages
• notes
• reporting face to face
Relevant workplace procedures will include:
- hazard policies and procedures
- emergency, fire and accident procedures
- procedures for the use of personnel clothing and equipment
- hazard identification and issue resolution procedures
- job procedures and work instructions

Hazards include:
- workplace stress
- manual handling
- toxic substances
- body fluids
- infections
- fire

Supervisor may be:
- nominated personnel
- occupational health and safety nominee

Work instructions may be:
- given verbally
- written
- in English
- in community language
- provided visually on video, instructions sheets

Workplace procedures for controlling risks include:
- manual handling techniques
- strategies for reducing the amount of manual handling required

Indications of stress may include:
- health problems
- changes in behaviour
- frequent absences
- negative attitudes
- unaware of own stress levels

Rest time and breaks may include:
- morning tea, lunch, dinner breaks, etc.

Workplace procedures may include:
- grievance procedures
- team meetings
- debriefing procedures following crisis

Items which may be contaminated may include:
- syringes
- clothing
- food

Working in a manner which ensures personal safety may include:
- carrying communication equipment
- wearing protective clothing
- carrying alarms

Organisational security measures may include:
- locking doors
Evidence Guide:

Required Certification:
• current Level 2 First Aid Certificate or equivalent

Critical aspects of evidence:
• ability to work safely, and follow the organisations occupational health and safety policies and procedures

Underlying knowledge and skills:
• significant hazards in the workplace both indoors and outdoors
• location and use of safety equipment such as fire extinguishers and emergency units and alarms
• workplace procedures that apply to fire, accidents and emergency situations
• potential hazards in the workplace and the risks/potential risks of certain behaviours, layouts/features
• universal precautions and infection hazards
• lifting and transfer techniques
• basic knowledge of first-aid including:
  • cardiopulmonary resuscitation
  • broken bones
  • poisons
  • bandaging
  • bleeding
• implementation of practices to prevent or minimise risk
• awareness of legislative requirements and best practice approaches to occupational health and safety
• understanding of rights and obligations of employees and employers regarding occupational health and safety
• application of safe handling practices and other safety procedures
• proper use of equipment
• reading and writing skills literacy competence required to fulfil job roles in a safe manner and as specified by organisation/service. The level of skill may range from the ability to understand symbols used in occupational health and safety signs, to reading workplace safety pamphlets or procedure manuals, to reading labels and handling chemicals such as cleaning fluids. Literacy support available in the workplace may range from having access to support or assistance from expert/mentor/supervisor, to having no communication supports available. Literacy may be required in English or a community language depending on the language used in pamphlets or workplace manuals
• oral communication skills language competence required to fulfil job roles in a safe manner and as specified by the organisation/service. Assessors should look for skills in asking questions, providing clear information, listening to and understanding workplace instructions, and clarifying workplace instructions when necessary. Service/organisation may require competence in English or community language, depending on client group

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace environment
• assessment may be conducted on one occasion but should include normal range of workplace activities
Context of assessment:
- competence is demonstrated in the context of an established occupational health and safety system
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCORG5A Maintain an effective work environment

Meeting individual responsibilities within a work group.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| **1. Work to achieve identified outcomes** | - own work roles and responsibilities are defined and agreed with appropriate people  
- work plans are developed and implemented to ensure:  
  ◊ desired outcomes are achieved  
  ◊ objectives are met  
  ◊ agreed timeframes are met  
  ◊ compliance with relevant guidelines and procedures  
  ◊ contingencies are managed  
  ◊ duty of care responsibilities are met  
  ◊ ethical practice  
  ◊ the work of the organisation is promoted  
- where appropriate to workrole, an understanding of relevant legislation and awards is incorporated into work place practices and decisions  
- where relevant to workrole, unpaid workers and others are provided with appropriate training, briefing and supervision  
- where problems arise in meeting work plans, action is taken as appropriate to re-negotiate or seek assistance |
| **2. Establish and maintain appropriate work relationships** | - effective communication and interpersonal skills are used to ensure all workplace interactions contribute to achievement of organisational objectives and promotion of the community services industry  
- workplace relations reflect consideration of the full range of individual and cultural differences  
- any issues related to the wellbeing of work colleagues are dealt with promptly and in accordance with organisational procedures  
- potential and actual conflicts in the workplace are handled to minimise disruption |
| **3. Facilitate operation of the workgroup** | - active participation in all team processes is undertaken to ensure team objectives are met  
- individual responsibilities within the team are achieved to the identified standard and timeframe  
- individuals for whom the worker is responsible are informed of standards of workplace performance in an appropriate manner  
- the range of individual skills and knowledge are developed and utilised to enhance team performance  
- appropriate effort is applied to maximise effective communication and to ensure issues are resolved within the team, and conflict is resolved |
| **4. Review and develop own performance** | - own performance is regularly monitored against workplans, organisational objectives and client needs  
- opportunities for formal and informal development of skills and knowledge are sought out and accessed to optimise performance |

**Range of Variables**
Teams include:
- formal and informal arrangements
- workgroups including members from outside the organisation

The context for creating, maintaining and enhancing productive working relationships includes with:
- clients
- significant others
- unpaid workers
- staff for whom worker is responsible
- peers
- supervisors

Guidelines and Procedures include:
- occupational health and safety
- equal employment opportunity
- harassment
- first aid
- grievance management
- infection control
- workplace behaviours

Creating, maintaining and enhancing productive working relationships will be carried out within requirements established by:
- state and commonwealth legislation
- organisational policy, procedures and standards

Evidence Guide

Critical aspects of assessment:
- demonstrate effective team operation
- meet legal, legislative and industrial requirements
- undertake assessment of own training and development
- ability to manage conflict

Underpinning knowledge:
- organisational mission, philosophy, organisation structure, policies and procedures
- legislation relevant to organisation and work carried out
- effective team management

Underpinning skills:
- team building skills
- communication
- time management and prioritising
- work planning and evaluation
- interpersonal skills

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- assessment may be conducted over one or more occasions
Context of assessment:

- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG6A Coordinate the work environment

Undertaking supervisory and coordinating activities in work groups in community service organisations.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Contribute to and promote effective work practices | - effective ways of working to sustain ongoing health and morale are identified and implemented routinely  
- work plans are developed and implemented to ensure:  
  ◊ client needs are addressed  
  ◊ desired outcomes are achieved  
  ◊ objectives are met  
  ◊ agreed timeframes are met  
  ◊ compliance with relevant guidelines and procedures  
  ◊ contingencies are managed  
  ◊ duty of care responsibilities are met  
  ◊ ethical and non discriminatory practices  
  ◊ the work of the organisation is promoted  
- strategies are developed and implemented in consultation with appropriate people to maximise work performance and outcomes, including addressing barriers and constraints  
- where relevant to workrole, effective measures are implemented to ensure new and existing staff:  
  ◊ are fully informed of what is expected of them  
  ◊ are provided with appropriate orientation, induction and development opportunities  
  ◊ contribute to ongoing review of workplace practices  
  ◊ have written workplans which are regularly reviewed  
- all effort is made to implement processes and practices which promote cooperative work practices and maintain positive relationships with staff and management  
- responsibility for own behaviour is taken and ways to developing effective working relationships are identified and implemented |
| 2. Promote effective workplace relations       | - effective communication including open discussion and active listening is modelled and promoted in the workplace  
- potential and actual conflict situations are identified, and appropriate strategies to deal with these are developed and implemented, to minimise effects on the workplace and address rights and responsibilities of all parties  
- throughout conflict resolution processes access to appropriate support, mediation, facilitation and debriefing for parties is assured within organisational constraints  
- every effort is applied to resolve issues which may disrupt work unit activities |
3. Facilitate work group activities

- when conducting meetings the purpose is clarified, procedures are agreed, roles and responsibilities are negotiated, agreed timeframes are adhered to, and equality of participation and input by group members is maintained
- feedback on operation of group processes is sought, suggestions for change encouraged and appropriate action implemented
- feedback is provided in a supportive manner appropriate to individuals and the group

4. Develop and implement staffing processes as required

- confidentiality in relation to staff processes is maintained according to organisational policy and to protect individuals
- planning is undertaken as appropriate to identify areas of need and proposals are developed to address them including resourcing staffing arrangement
- participation in recruitment processes is undertaken as required
- if staff performance is unsatisfactory, counselling and support is provided to improve performance
- staff performance issues are addressed as required in accordance with organisations procedures
- staff access to appropriate training is encouraged and facilitated to enable the achievement of outcomes in the workplace and organisation

5. Advocate for workplace health and safety and fair employment practices

- commonwealth and state legislation and organisational guidelines relating to occupational health and safety, equal employment opportunities and anti discrimination in the workplace are made known, promoted and modelled to organisational staff and management
- work practices are negotiated, developed and implemented within the above legislative and organisational guidelines
- individual workers rights and obligations are documented and communicated in a manner and language that can be clearly understood by relevant parties
- where there are breaches of relevant workplace legislation, timely and appropriate action is taken according to level of responsibility in the organisation

Range of Variables

Staffing requirements may cover the following staff:
- permanent/casual
- temporary/contract
- paid/unpaid
- full time/part time
- trainees
- secondments and work exchanges

Staffing proposals will include:
- salary conditions
- terms of engagement
- hours of work
• resources costs, equipment, office space, furniture, travel
• implications for the organisation
• outcomes and performance requirements
• skills, education, experience
• delegations, accountability
• team members
• supervision

Organisational policies and procedures will relate to:
• administrative processes
• management and decision making processes
• recruitment and employment practices
• grievance, complaints and discipline processes
• occupational health and safety
• accounting of income and expenditure
• employment conditions
• recruitment and termination practices
• use of equipment and venue
• training and development practices
• career development and progression
• contracts
• accountability
• induction
• monitoring
• rosters

Management may be by:
• voluntary community management committee
• board of management
• collective
• government program or unit director
• project management committee

Evidence Guide

Critical aspects of assessment:
• development of effective working relationships with all staff
• positive communication with all staff
• establishment of effective procedures to maximise staff work performance

Underpinning knowledge and skills of:
• effective workplace communication
• organisation policies and procedures
• relevant industrial relations conditions, requirements and awards
• broad implications of relevant legislation
• legal, health and safety requirements as they relate to the organisation
• computer hardware and software technology, as required by the workplace
• recruitment techniques
• basic contract management

Resource implications:
• access to appropriate workplace where assessment can be conducted

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment should be gathered principally from material drawn from workplace or from work experience in a relevant simulation
Context of assessment:
• it is recommended that this unit be principally assessed in the workplace
**CHCORG7A Manage workplace issues**

Implementing appropriate people management processes and structures to maximise work outcomes.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</thead>
</table>
| 1. Manage staff planning and recruitment    | • staffing requirements are assessed and recommendations implemented in the context of available resources and organisational priorities  
• job specifications and position responsibilities are developed through appropriate consultation and agreement  
• staff are recruited as required using timely and appropriate processes and providing all relevant documentation as required by the organisation |
| 2. Manage work allocation                    | • work allocations optimise the use of resources and the existing competencies of staff  
• team and individual responsibilities and authority are clearly defined, agreed and communicated  
• workers have appropriate access to, and are supervised by, the people best able to satisfy their agreed work and development needs  
• where work allocations prove to be unrealistic or organisational demands change, adjustments are made which minimise the impact on resources and client service delivery  
• mechanisms are put in place to continually evaluate and improve work practices |
| 3. Evaluate workgroup effectiveness          | • constructive feedback is provided in an appropriate way to maximise personal and organisational effectiveness and includes:  
  ◊ recognising performance and achievement and encouraging self assessment  
  ◊ keeping details of feedback sessions in line with organisational guidelines  
  ◊ encouraging individuals to take responsibility for their own decisions and actions  
• where staff counselling is undertaken it is within organisational guidelines and to individual skill levels  
• referrals are made to counselling services as appropriate  
• all discussions with individuals are designed to encourage and assist them to take responsibility for their own decisions and actions  
• appropriate work is undertaken to address areas of potential conflict in a timely way so impact on workplace performance and relations is minimised  
• appropriate mechanisms are implemented to ensure the workplace is safe and healthy and bias and discrimination are minimised |
4. Implement disciplinary and grievance procedures

- where disciplinary action is taken it meets organisational and legal requirements
- all records of such actions are kept according to organisational policies and procedures
- appropriate grievance procedures are implemented
- where difficulties arise in implementing action or procedures, advice is sought from appropriate sources and feedback is provided to contribute to evaluation processes

Range of Variables

The context for managing people includes:
- management of a work unit project team organisation
- government/non government organisations

Managing people will be carried out within requirements established by:
- state and commonwealth legislation
- agency policy and procedures
- relevant program standards
- recognised good human resource management practice

Disciplinary and grievance procedures take place in a framework of:
- statutory procedures
- organisational procedures including joint agreements between employers and employees

Counselling is concerned with matters of a personal nature which affect the individual’s behaviour at work

Evidence Guide

Critical aspects of assessment:
Competency is to be demonstrated in:
- planning and recruitment of staff
- allocating work
- managing and facilitating teams
- coaching, counselling of staff
- managing staff performance

Underpinning knowledge:
- organisational objectives, policies and procedures
- human resource management theory, principles and practices

Underpinning skills:
- team management
- effective interpersonal and communication skills
- managing people

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment
**Consistency in performance:**
- assessment may include observations, questioning and evidence gathered from the workplace
- assessment may be conducted over more than one occasion or use material drawn from the workplace for a period of time
- assessment must include the range of management processes in the workplace

**Context of assessment:**
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCORG8A Establish and manage new programs or services

Establishing new programs or services, leading organisational restructure, and developing new structures and systems.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
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</table>
| 1. Complete strategic planning activities | • the need for development and change is researched, assessed and identified and all relevant people are consulted in an appropriate way  
• goals and objectives consistent with the purpose and philosophy of the organisation are clarified, negotiated and agreed with key stakeholders and target groups  
• risks associated with implementing the strategy are recognised and steps taken to maximise outcomes to ensure compliance with duty of care and meet all objectives  
• the proposed strategy is evaluated against existing programs and services, and gaps identified  
• negotiations are carried out in a way which generates support and which takes account of the viewpoints of key stakeholders  
• financial cost and resource requirements are identified and assessed  
• where required resources are not immediately and readily available, submissions are made to potential relevant funding sources  
• appropriate structures are implemented to oversee the task as relevant |
| 2. Manage implementation of new program or service | • implementation plans are developed to suit a variety of contexts and to cope with contingencies  
• appropriate support is provided to those involved in implementing the strategy to ensure original aims and objectives are pursued  
• policies and procedures to manage the use of staff, equipment and other physical assets are established, monitored and reviewed on a regular basis  
• all operational details including timeframes, resources, staffing limits and financial procedures are conveyed in an appropriate manner, to relevant personnel  
• a budget is developed and expenditure and resources are monitored in line with organisational procedures and planned outcomes  
• the project or strategy is implemented in line with all relevant guidelines and legal requirements |
| 3. Establish and manage organisational and operational arrangements | • a structure consistent with the purpose, philosophy and roles of the organisation, and which meet industrial, legal and policy requirements is determined in conjunction with key clients and stakeholders  
• documentation systems and processes are developed to ensure all legal requirements are met and are submitted to relevant decision makers for authorisation as appropriate  
• required records are maintained and kept to ensure legal organisation and statutory requirements are met  
• appropriate promotional activities are developed and directed at stakeholders, target groups and relevant personnel within the organisation to optimise effectiveness and support |
|---|---|
| 4. Undertake appropriate evaluation and reporting | • the evaluation strategy and related techniques devised to collect and analyse data meet the needs of decision makers, funding organisations and other people and groups with stake in strategy  
• the criteria to be used to judge the value and effectiveness of the strategy are defined in consultation with relevant people  
• the views of interested parties are actively sought at regular time intervals and used to inform the ongoing development and implementation of the strategy  
• progress in implementing of the strategy is regularly monitored against the agreed plan  
• evaluation information is used for project or strategy revision, ongoing development and implementation |

**Range of Variables**

The contexts for planning, managing and evaluating programs and services includes:
• managing projects or strategies internal to the organisation/agency  
• managing projects or strategies across organisation/agencies  
• managing projects in collaboration with the community or community-based organisations

Planning, managing and evaluating programs and services will be carried out within requirements established by:
• organisational missions, philosophy, outcomes and goals  
• quality standards  
• organisational policy, procedures and program standards  
• state and commonwealth legislation and other statutory requirements  
• international conventions on the rights of children and young people  
• duty of care, code of ethics, professional standards, organisational standards

Evaluating feasibility of programs or services includes:
• direction and outcomes are evaluated against existing and future organisational mission, objectives and outcomes for consistency and congruity  
• stakeholders impacted on by project or strategy are involved as much as is appropriate in setting the direction, providing input eg. content and/or process, and marketing

Identifying and acquiring resources includes:
• preparing submissions  
• liaising with key stakeholders and assessing the availability and accessibility to funding
Evidence Guide

Critical aspects of assessment:
- ability to devise, initiate, manage and evaluate programs and services
- evidence of competency requires demonstration of knowledge related to applicable agency and legislative requirements

Underpinning knowledge:
- project management models/processes
- submission writing protocols
- funding sources and submission protocols
- referral protocols
- range of services available across organisations
- marketing models/systems
- financial management models/systems
- people management models/systems
- general management principles/models
- change management models/principles

Underpinning skills:
- project management
- financial management
- people management
- communication
- delegation

Resource implications:
- access to appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment

Consistency in performance:
- it is recommended that assessment be conducted over more than one occasion and that competence be demonstrated in the planning, implementation and evaluation of at least one new program

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCORG9A Manage projects and strategies

Initiating, planning, implementing and evaluating project management activities.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Consider the need and scope for the project/strategy | - in considering the need for the project or strategy, the extent to which existing initiatives and services already address the needs and issues is reviewed, and the results incorporated into the scoping report  
- the rationale and underpinning values and beliefs for the proposed project or strategy is clearly articulated to key stakeholders and their views and involvement are sought as appropriate  
- a concept plan is developed and submitted to decision makers for consideration and approval prior to proceeding to the project plan stage |
| 2. Prepare a project plan | - the project plan developed incorporate relevant literature and other information  
- the project plan developed identifies:  
  ◊ a set of aims and specific and assessable objectives which address identified needs  
  ◊ a proposed timetable for the project/strategy  
  ◊ financial costs of project/strategy and relationship with available resources  
  ◊ benefits to client of the proposed project/strategy  
- the plan takes account of the anticipated context and specific nature of the people who will be involved in developing and implementing the project/strategy  
- appropriate level of consultation is undertaken with all those who make a contribution to the proposed project/strategy and their views are clearly and accurately reported  
- aspects of the plan are negotiated with relevant people as required |
| 3. Identify and acquire resources to make implementation of project plan possible | - funding options for implementing the plan are developed  
- where resources are not available, funding proposals are made to relevant bodies as appropriate  
- funding submissions made are in accordance with any guidelines available from the funding and written in a format acceptable to decision makers  
- appropriate liaison and negotiation are undertaken with decision makers and potential funding bodies to advance the case to acquire resources |
| 4. Promote and advertise project/strategy | - a marketing/promotion strategy is developed and submitted for approval to decision makers prior to project implementation  
- variety of appropriate communication media is utilised to promote the project to the target audience |
5. Manage implementation of project/strategy

- support is given to those who are involved in implementing the project or strategy to establish and maintain clarity about the aim and objectives to be pursued
- logistical details of time scales, place, resources, staffing, limits of and administrative procedures of income and expenditure, are conveyed clearly, and in an appropriate manner, to those implementing the project/strategy
- policies and procedures are established, monitored and reviewed on a regular basis to manage the use of staff, equipment and other physical assets
- a project budget is developed and expenditure and resources are monitored against the budget, in line with organisation policies, procedures and planned time scales
- risks associated with implementing the project or strategy are identified and steps taken to maximise high quality project outcomes
- strategies are implemented to ensure the project/strategy is implemented in line with relevant guidelines and legal requirements and is sufficiently flexible to suit a variety of contexts and to cope with contingencies
- strategies are implemented to ensure the project or strategy is adapted in the light of feedback, and to take account of the changing social, political and economic context

6. Evaluate and report on project/strategy

- in choosing an evaluation strategy a variety of models are examined
- the evaluation strategy employs appropriate techniques to collect data taking into account the nature of information, time and resource constraints, and the views of people and groups who have a stake and interest
- the implementation of the project or strategy is regularly monitored against the agreed plan
- the collection, collation and reporting of evaluation information meets the standards and needs of decision makers, funding agencies and other people and groups with a stake in the project/strategy
- evaluation information collected is used for project/strategy revision, ongoing development and implementation and possible future directions

Range of Variables

Projects may:
- include events and campaigns of social, cultural, economic and political significance
- relate to employment creation, health, housing, legal advocacy initiatives
- address the interests of either individual clients, groups or communities

Strategies may relate to:
- awareness raising and community education
- political lobbying
- community participation initiatives
- advertising to attract participation
Factors to be addressed in the design of projects/strategies will include:
• analysis of social, political and economic factors and trends
• assessment of actual and potential impacts both positive and negative for clients

Evidence Guide

Critical aspects of assessment:
• ability to establish, manage and evaluate projects and services
• evidence of competency requires demonstration of knowledge related to applicable organisation and legislative requirements

Underpinning knowledge:
• project management models/processes
• business and strategic planning
• funding sources and submission protocols
• range of services available across organisations
• marketing models/systems
• financial management models/systems
• people management models/systems
• general management principles/models

Underpinning skills:
• project planning and management
• financial/resource management
• people management
• research and evaluation

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace setting eg. portfolios, completed reports on projects etc.
• assessment is recommended to be conducted on more than one occasion and should include each phase of managing a project ie. scoping, preparation, promotion, management and evaluation

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCOR10A Manage organisational change

Fostering and implementing constructive and beneficial change in a complex organisation.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Ensure practices of the organisation are appropriate | - processes are designed and implemented to continually review the relevance of the organisation's philosophy in the light of the needs of clients and key stakeholders  
- ongoing evaluation is undertaken to ensure organisational practices are consistent with its philosophies and policies and positively contribute to meeting client and stakeholder needs  
- ongoing monitoring is undertaken of organisational policies and practices to ensure they:  
  ◊ do not support discrimination  
  ◊ promote ethical behaviour  
  ◊ meet duty of care responsibilities  
  ◊ are based on principles of natural justice  
  ◊ meet funding requirements  
  ◊ continue to be relevant |
| 2. Respond to change in the community | - appropriate strategies are implemented to provide accurate and current information on trends and changes in the community which may impact on the organisation and its clients  
- social, political and economic trends are identified, anticipated and assessed for their impact on the organisation, the community and the client group  
- where required expert advice and/or research is commissioned to provide access to detailed information about trends and the likely impact of changes  
- membership of professional associations, research organisations and networks is used to keep current with information and trends  
- management and work practices are assessed and revised as appropriate to reflect trends and research findings |
3. Initiate and implement organisational change within a planning framework

- requirements and opportunities for change in policies and practices are identified, developed and promoted to relevant staff, clients and stakeholders
- the nature and scope of required changes are defined, and strategies developed to successfully implement them, including:
  - determining budgetary considerations
  - appropriate consultation, negotiation and communication
  - addressing possible barriers
  - promoting effects and benefits of change
  - risk assessment
- changes which are identified and implemented reflect:
  - consideration of a range of alternatives
  - appropriate consultation and communication with staff, client and stakeholders
  - current accepted good practice
  - appropriate levels of planning
  - organisational quality assurance processes
  - provision of relevant training
- processes are put in place to ensure outcomes of changes are evaluated against expectations and previous performance

## Range of Variables

*Trends may include*
- social, political and economic trends driven from a variety of sources

*Organisational change may relate to:*
- nature and focus of service, programs and activities
- service users/funding providers
- staff requirements
- employment and work practices
- management decision making processes
- building and other resources
- levels and sources of funding
- legislative and statutory framework
- technological changes
- internal and external policies
- community expectations

*Research sources will include:*
- statutory/government bodies
- commonwealth and state government reports
- peak bodies
- political party policy
- academic studies
- Commission of Inquiry, Royal Commissions, Senate Inquiries Reports
- professional associations journals and projects
- conferences, seminars, visiting speakers
- publications, newsletters
- media
- social action and research bodies
Evidence Guide

Critical aspects of assessment:
- developing and implementing organisational policies and procedures indicated in the Range of Variables
- consulting research sources identified in the Range of Variables
- working with aspects of organisational change as identified in the Range of Variables

Underpinning knowledge:
- a range of approaches to organisational planning and management
- community consultation mechanisms
- marketing and promotion
- organisational change strategies
- relevant government policies and systems
- principles and practices of change management theory
- scope and operation of the industry
- the services and products of the research sources listed in the range of variables
- funding/income strategies

Underpinning skills:
- continuous improvement principles and practices
- literacy
- communication and negotiating with senior level decision makers and community leaders
- preparing and delivering public presentations
- community consultation
- planning and review processes
- coordinating a complex range of issues and relationships
- analysis
- leadership and motivation
- service quality maintenance
- financial management and maintenance

Resource implications:
- access to appropriate workplace where assessment can be conducted or

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- it is recommended that assessment take place on more that one occasion or evidence gathered that provides evidence of competence over a period of time

Context of assessment:
- this unit is most appropriately assessed in the workplace under the normal range of workplace conditions
### CHCORG11A Lead and develop others

Achieving identified work outcomes through managing, leading and developing individuals and teams in the work group or organisation.

<table>
<thead>
<tr>
<th>Element</th>
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</table>
| 1. Provide leadership, direction and guidance to the organisation | • briefings on work goals, plans and operational issues are provided regularly to work groups to minimise role ambiguity and maximise effectiveness  
• encouragement is provided to develop new and innovative work practices and strategies to optimise work outcomes and better meet client needs  
• a high standard of performance and practice is modelled to staff  
• leadership and supervision appropriate to changing priorities and situations is provided and takes into account the differing needs and backgrounds of individuals, the requirements of the task and client needs  
• diversity in knowledge, skills and approaches of individuals is utilised to enhance work outcomes  
• principles and practices of equal employment opportunity, occupational health and safety and participative work practices are modelled and promoted to staff |
| 2. Maximise own performance outcomes | • effective time and work management techniques including monitoring workflow and outcomes are used to meet priorities and achieve identified objectives  
• work is planned and progress monitored to minimise effects of unexpected outcomes  
• all work undertaken complies with established policies and procedures especially those relating to anti-discrimination and occupational health and safety  
• work practices are reviewed and revised regularly to assist achievement of identified objectives  
• opportunities are sought and taken for continuous self-development/learning |
| 3. Manage effective work relationships | • the link between the function of the group, the goals of the organisation and the responsibilities of individuals are clearly articulated and communicated to staff routinely  
• participative decision making processes are used routinely to allocate responsibilities and develop, implement and review work of the group  
• where relevant, conflict is identified and resolved with minimum disruption to workgroup function and in accordance with organisational procedures  
• allocation of tasks is within the competence of staff and is supported by appropriate delegation and training  
• interpersonal styles and methods are adjusted to the social and cultural context  
• communication and interaction with colleagues and management reflects a variety of appropriate techniques |
4. Manage and improve the performance of individuals

- the performance of the group in achieving objectives is monitored, reviewed regularly and used as the basis for further allocation of work
- individual outcomes are monitored and reviewed in consultation with the workgroup to measure and assess progress against objectives and identify issues for attention or further work
- work practices are revised as required to achieve workgroup and corporate goals
- performance problems are addressed in a fair, constructive and timely manner in accordance with relevant guidelines, procedures and natural justice
- individual and group progress is monitored and regular feedback provided to optimise achievement of organisational objectives
- support is provided to the work group to develop mutual commitment and cooperation
- workgroup effectiveness is promoted and encouraged through active participation in group activities and communication processes

5. Support, participate and review group development

- development plans are put in place for each staff member with relevant development activities identified
- an action plan to meet individual and group training and development needs is developed, agreed and implemented
- staff are encouraged and supported in applying skills and knowledge in the workplace
- relevant specialist training which is required is identified and delivered, if required
- appropriate training is arranged and provided to meet individual and organisational needs
- staff are encouraged and supported to attend training courses and to take up other development opportunities

6. Support and develop managers

- managers are provided with personal and career development opportunities from within and outside of the organisation
- regular meetings are held with managers to review, adjust and develop strategies and priorities
- priority tasks are agreed and achievement of work plans is monitored to maximise organisational effectiveness
- the overall performance of managers is monitored and feedback provided regularly in an appropriate manner
- opportunities are provided for targeted professional development

Range of Variables

Relevant information affecting the workgroup can include:

- relevant legislation
- corporate and strategic plans, including Human Resource Management and Human Resource Development strategic plans
- work area business plans
- industrial awards
- personnel management guidelines and circulars
- quality standards

Training and development opportunities can include:
• formal internal and external courses
• on the job training
• placements at the same level, work experiences and assignments, and higher duties
• assisted formal study
• conference and seminar attendance
• support for professional development activities
• induction and orientation

Procedures and guidelines can include:
• financial/administrative procedures
• fraud prevention
• occupational health and safety

Evidence Guide

Critical aspects of evidence:
• works effectively in a team environment
• uses both participative and consultative management practices
• provides appropriate development opportunities

Underpinning knowledge:
• human resource development and management principles and practices
• budget processes
• effective team management

Underpinning skills:
• effective communication and interpersonal skills including:
  ◊ language competence required to fulfil the procedures of the organisation/service. Language used may be English, signing or a community language
  ◊ literacy competence required to fulfil the procedures of the organisation/service. Language used may be English or a community language
  ◊ negotiation
• time management and work planning
• awareness and understanding of effective individual and team operations

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• it is recommended that assessment take place on more than one occasion

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCORG12A Review organisational effectiveness

Managing the continuous improvement of practices of the organisation.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Respond to the external environment | • strategies are implemented to continually identify and analyse relevant external trends in terms of their impact on the organisation, its clients and the community  
• strategies are implemented to ensure organisational practices and policies reflect current statutory and legislative requirements  
• best practice and comparison data is gathered and used to identify potential areas for improvement to respond to changes and trends  
• mechanisms are implemented to collect feedback from clients, target groups and the community which is used to review organisational effectiveness and the relevance of strategic and business plans |
| 2. Implement continuous improvement | • appropriate mechanisms for performance evaluation are used to measure organisational effectiveness including review of:  
◊ financial and personnel performance data  
◊ client satisfaction levels  
◊ compliance with current legislative/statutory requirements  
◊ protocols, practices and procedures  
◊ staff competency levels  
◊ staff planning, recruitment and training  
◊ information technology  
• organisational practices and procedures are revised as appropriate to reflect the outcomes of performance evaluation  
• consultation, including with staff and relevant industrial parties, is undertaken to facilitate implementing organisational improvements  
• appropriate quality assurance procedures are developed and routinely applied and are reviewed for continuing relevance |
| 3. Refocus the organisation/service | • information is regularly collected on changing client and community needs and used to review the continuing relevance and effectiveness of services provided  
• where there are indicators that organisational services, practices and directions need to change to reflect changing client requirements, the policy or financial environment or community directions, a full range of options are explored to ensure that revisions are appropriate and meet needs  
• where appropriate, alterations are made to strategic plans and organisational objectives and priorities, to reflect changing directions in service delivery  
• consultative processes are routinely used to ensure staff, clients and stakeholders support changed arrangements  
• appropriate training is provided for staff to enable maximum outcomes from continuous improvement processes |

Range of variables
Service/agency improvement options may include:
- continuous improvement processes
- best practice management approaches
- process re-engineering
- quality assurance mechanisms

Relevant trends and developments may include:
- political/social
- economic
- demographic
- changes in technology
- impact of changing policies and services

Internal trends/developments may include:
- level of staff skill and commitment
- industrial relations issues
- staffing levels
- changes to staff and management
- new policies and work practices
- quality assurance standards
- client expectations

Evidence Guide

This unit is based on the Small Business Management cross-industry competency standards Aug 1995 of the same name.

Critical aspects of evidence:
- practices are developed and implemented which improve organisational effectiveness
- consultation occurs with staff and other relevant parties

Underpinning knowledge:
- strategic planning principles and approaches
- process re-engineering
- quality assurance
- organisational management and development

Underpinning skills:
- effective communication and interpersonal skills including:
  - language competence required to fulfil the procedures of the organisation/service.
  - literacy competence required to fulfil the procedures of the organisation/service.
- negotiation
- time management and work planning
- awareness and understanding of effective individual and team operations

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- it is recommended that assessment take place on one or more occasions to enable assessment of all aspects of competence in review of organisation effectiveness
Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG13A Manage organisational strategic and business planning

Undertaking ongoing strategic planning to assist in continual improvement of the service or organisation.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Formulate a strategic and business plan | • the desired direction and goals of the organisation are developed in consultation with relevant stakeholders to reflect client needs
• the strategic plan is developed on the basis of information obtained through research into client needs, resource requirements, interests of key stakeholders and business viability
• a financial plan is formulated to estimate cash flow projections, provide budgetary information and define implementation/service plans
• the work/service plan is formulated, and aims at supplying services which meet client expectations and satisfies quality assurance criteria
• the plan identifies options for delivery of service in accordance with budgetary constraints, human resource requirements, client requirements and agency objectives
• promotional strategies are developed to communicate benefits of the service to the clients
• risk management strategies are developed according to agency needs
• all aspects of the business plan are mutually supportive |
| 2. Apply the strategic and business plan | • appropriate operational and revenue control systems are implemented and routinely evaluated for their ability to provide systematic support to the agency
• systems and key performance indicators and targets are identified and used to monitor agency performance and client satisfaction
• the organisation's business plan is clearly communicated to relevant stakeholders and staff to ensure their understanding and support
• appropriate organisational structures are designed/redesigned and implemented to optimise achievement of organisational goals and stakeholder expectations |

Range of variables

The strategic plan will depend on:
• size and scale of the service/organisation
• the client focus and needs
• the level of available funding and the need to raise finance
• the level of risk involved
• service/organisational philosophy
• the community within which it operates

The strategic plan should include:
• mission, goals and objectives
• strategies for achieving goals
• work plans
• income and expenditure statement
- cash flow forecast
- quality assurance mechanisms
- performance measures

The financial plan takes account of:
- current financial state of the organisation
- financial performance to date
- a review of financial inputs required sources and forms of finance
- projections of likely financial results budgeting
- risks and measures to manage or minimise risks
- forms of finance including working capital, fixed capital, debt and equity capital

Sources of finance may be:
- through donations
- financial institutions
- industry sources
- government sources
- borrowing/investments
- commercial activities

Projections may include:
- resource requirements
- estimates of profit and loss
- cash flow estimates

Stakeholders may include:
- providers of finance
- clients
- suppliers of resources
- community
- industry associations
- workers
- management
- government and/or funding bodies

Evidence Guide

Critical aspects of assessment:
- business plan is part of and assists in improvement of the service or organisation
- consultation with relevant people take place
- business plan meets legislative and legal requirements

Underpinning knowledge:
- strategic planning principles and approaches
- process re-engineering
- quality assurance
- organisational development and management

Underpinning skills:
- negotiations
- time management and work planning
- awareness and understanding of effectiveness of individuals and teams in the service
- effective communication and interpersonal skills including:
- language competence required to fulfil the procedures of the organisation/service. Language used may be English, signing or a community language
- literacy competence required to fulfil organisation's procedures. Language used may be English or a community language
• numeracy competence required to complete financial plans for the organisation

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment may take place on more than one occasion but must cover assessment of all aspects of formulating and applying a business plan

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG14A Manage a service organisation

Planning and monitoring the development direction and changes of a complex organisation, range of programs or major program area.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
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</table>
| 1. Coordinate organisational planning | - appropriate strategic alliances are identified and participation is negotiated and maintained  
- the overall purpose and philosophy of the organisation are identified and translated into a written or recorded set of aims and objectives which are clearly understood, measurable and attainable and evaluated as appropriate  
- appropriate corporate planning processes which maximise consultation and devolution of planning, are implemented  
- appropriate corporate planning process which ensure responsiveness to client needs are implemented  
- appropriate consultation is undertaken with relevant people and agencies  
- appropriate management structure and process is established to coordinate corporate planning, advise decision makers and to reflect principles and philosophy of the objectives  
- the way in which the values and beliefs of workers and stakeholders may influence the defined organisational purpose and philosophy is analysed and communicated to all relevant participants  
- resources are made available as appropriate to support the planning processes at all levels  
- systems, processes and timeframes are developed for all aspects and components of the planning process |
| 2. Design and implement the structures and process of the organisation | - an appropriate structure is determined for the organisation to match organisational philosophy and purpose  
- lines of decision making and accountability are developed, agreed, implemented and monitored  
- budgets are prepared in line with the strategic plan and make allowance for all requirements and components of planning and implementation of programs and services  
- financial accountability systems are established which meet agreed organisation best practice provisions  
- planning guidelines provide for inclusion of appropriate statutory, legislative and practice provisions  
- planning guidelines and systems are developed which are clear, fully documented and accessible to all involved |
| 3. Implement evaluation processes | - appropriate consultations are held with stakeholders to examine issues and trends; and outcomes are advised to decision makers as required  
- all required reporting is completed in a timely way in accordance with organisational requirements  
- appropriate evaluation arrangements are identified, developed and implemented with representation from relevant stakeholder groups  
- advice is prepared and provided to decision makers within the negotiated format and timeframe |
| 4. Enable organisation to meet legal requirements | • mechanisms are implemented to ensure relevant commonwealth, state and local government legal requirements are identified and adhered to  
• information about current legal requirements is updated regularly and if appropriate, proposals to modify organisational policy and procedures developed |
|---|---|
| 5. Establish the profile of the organisation and market its services | • formal and informal networks are used as channels to communicate the organisation's activities and achievements  
• a range of communication mediums and activities are used to convey information about the activities and achievements of the organisation to encourage support and interest  
• opportunities to promote the organisation through media, government and the community are sought and utilised  
• confidentiality and sensitivity is displayed in the details, content and extent of public comment on organisation's activities |
| 6. Give direction for the effective management of the organisation | • when required policies and procedures for the employment role of the organisation are developed, articulated and their implementation monitored  
• problems in implementing defined procedures are addressed promptly to ensure resolution  
• reports which comprehensively and accurately describe the organisation's activities and achievements are prepared and presented to relevant stakeholders and management, as required  
• when required, management board meetings are serviced to ensure effective and informed deliberations and decision-making  
• mechanisms for effective coordination of activities and services are identified and implemented |
| 7. Manage changes in the organisation | • policy, social, political and economic trends are identified and assessed for potential impact on the organisation  
• management and work practices are assessed and revised relative to social, political and economic trends and impacts  
• indicators for change within the organisation are defined and monitored  
• opportunities for positive change are identified and promoted and appropriate work is undertaken to maximise support from staff, clients and stakeholders |

**Range of Variables**

*Strategies for the development of policies, practices and standards may include:*
• change management  
• organisational development

*Indicators for change include:*
• staff  
• management committee  
• organisational executive management turnover
• user involvement
• level of commitment to organisation's aims and objectives
• relationship with external agencies
• change in government policies and associated change in organisational focus

*Communication designed to promote the organisation include:*
• verbal presentations
• letters
• brochures
• fliers and other written advertisements
• poster and other artwork and audiovisual advertisements

*Organisational change related to:*
• nature and focus of service, programs and activities
• changing service users
• staff requirements
• employment and work practices
• management decision making processes
• membership changes
• new buildings and other resources
• different levels of funding
• legislative change
• technological change
• external policy change

*Strategic alliances will include:*
• industry networks
• professional associations
• other key agencies/organisations
• political parties and committees
• key government officers
• ministerial advisers and staff
• ministerial advisory committees
• key public policy and decision makers
• funding agencies
• business leaders
• community leaders
• social/economic/political researchers, analysts and advisers
• media
• special interest groups
• specialist services

*Evidence Guide*

*Critical aspects of assessment:*
• strategic planning
• managing organisational change
• developing strategies for adapting organisation to changes
• designing strategies to involve and communicate with all major stakeholders

*Underpinning knowledge:*
• best practice including:
  ◊ management systems and principles
  ◊ performance standards
  ◊ accountability
  ◊ training and skills development and recognition
  ◊ administrative systems and principles
◊ service quality development
◊ consumer focus
◊ enterprise agreements
◊ performance monitoring and review
• statutory and legislative requirements including:
  ◊ occupational health and safety
  ◊ industrial relations/enterprise contracts
  ◊ non discrimination
  ◊ equal employment opportunities principles and practice
  ◊ funding/service contracts/agreements
  ◊ corporate affairs/incorporation/Australian Securities Commission
  ◊ taxation

_Underpinning skills:_
• strategic thinking
• decision making
• environmental scanning
• analysis/evaluation
• facilitation
• high level liaison
• high level oral and written communication

_Resource implications:_
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

_Consistency in performance:_
• assessment may include observations, questioning and evidence gathered from the workplace
• it is recommended that assessment take place on more than one occasion to enable all aspects of managing a service organisation to be assessed

_Context of assessment:_
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG15A Promote the organisation

Developing and implementing promotional strategies and activities to maximise organisational effectiveness.

<table>
<thead>
<tr>
<th>Element</th>
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</table>
| 1. Design and implement a promotional strategy | - a profile of all potential users of the organisation is developed and maintained as part of the organisational strategic and business plan  
- resources required to effectively promote the service are assessed and obtained  
- promotional materials are developed and made accessible to all target groups |
| 2. Monitor, evaluate and review the promotion strategy | - goals for service use by identified client groups are set and monitored in accordance with organisational procedures  
- feedback mechanisms are established and utilised to review and evaluate the impact of service provision and promotional strategies  
- service provision and promotional activities are adjusted as appropriate |

Range of Variables:

*Resource needs will include:*
- staff and physical equipment/materials required to promote the organisation effectively

*Promotional materials will include:*
- activities such as workshops/forums/presentations/information displays  
- articles or advertisements in local or national media  
- information about the funding program and organisational eligibility criteria

*Appropriate people will include:*
- clients  
- colleagues  
- funding bodies  
- other related service providers as appropriate  
- other key stakeholders  
- community health workers

*Feedback mechanisms may include:*
- surveying clients by questionnaire, informal discussion and/or focus groups

**Evidence Guide**

**Critical aspects of assessment:**
- effectively promotes the organisation using appropriate strategies

**Underpinning knowledge**
- knowledge of the users and potential users of the service considering cultural backgrounds, social circumstances, range of abilities and disabilities  
- factors which lead to a client being eligible and having priority for service  
- factors which might hinder access to service  
- funding program guidelines  
- organisational guidelines for service  
- marketing/promotional techniques appropriate to the client group and community
- range of local community services and health agencies

**Underpinning skills:**
- research
- marketing/promotion
- communication
- networking
- research
- budgeting
- report writing
- evaluation
- presentations
- negotiation

**Resource implications:**
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

**Consistency in performance:**
- assessment may include observations, questioning and evidence gathered from the workplace eg. promotional material developed, written strategies for targeting audience etc.
- it is recommended that assessment take place on more than one occasion to ensure that all aspects of promotion are assessed ie design, monitor and evaluate promotional strategy

**Context of assessment:**
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCORG16A Manage training

Planning, developing and implementing training as a specialist activity to address individual skill levels to optimise organisational performance.

<table>
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</table>
| 1. Maintain training records | • an appropriate means of storing and accessing information on trainees, training programs and equipment, materials and resources is established and maintained according to:
  ◊ organisational policies and procedures
  ◊ legislative requirements
  ◊ need to protect confidentiality
  • training records are stored securely and are made available to authorised persons and trainees when required according to organisational procedures |
| 2. Report and advise on training | • reports on training related matters are prepared and provided to teams and management as required in accordance with organisational policies and procedures
  • the impact of training on skill levels and improvements in service are identified and communicated to relevant personnel
  • recommendations are made to teams and management on desirable future training initiatives based on organisational objectives and identified training needs
  • information on training techniques and trends, as well as training literature is maintained and made accessible to staff
  • implementation of current training trends and practices is promoted in the organisation |
| 3. Manage training expenditure and resources | • the training budget is prepared and written to reflect organisational resourcing and budget limits and training need priorities
  • records of training including expenditure and costs are maintained and used to develop recommendations for future action
  • required training resources are maintained according to organisational procedures
  • appropriate training resources and materials are made available as required
  • appropriate staff are allocated to training activities
  • funding sources are accessed wherever available to assist in providing training opportunities |
| 4. Maintain training activities within organisational and legal requirements | • training activities are managed and evaluated to determine effects on achieving organisational goals and to ensure compliance with relevant policies, awards and legislation
  • training activities are managed to take due account of relevant training reform policies and initiatives |
Range of Variables

The contexts for managing training include:
• as a manager of a training and development unit/branch/section
• as a manager of a work area/unit/program

Managing training will be carried out within requirements established by:
• organisational mission, direction, policies
• relevant human resource management policies and procedures
• state and commonwealth legislation
• organisational policies and procedures
• relevant program standards
• adult learning principles and education policy
• training and development principles
• resourcing arrangements
• competency based training principles and practices
• relevant professional bodies

Evidence Guide

Critical aspects of assessment:
• develops systems for planning, delivering and monitoring training
• manages budget processes
• applies current trends and practices in training
• applies legislative requirements

Underpinning knowledge:
• principles and practices of human resource development
• organisational strategic directions and objectives
• national policy and principles related to training
• strategic and financial planning models/principles

Underpinning skills:
• report and submission preparation
• financial analysis and planning
• application of information technology

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• assessment may take place on one occasion but must include all aspects of managing training

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCOR17A Implement and monitor occupational health and safety policies, procedures and programs

Implementing and monitoring relevant occupational health and safety legislation and codes of practice, including duties and responsibilities for all parties under the general duty of care and capacity to render first aid as required.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Provide information to the work group about occupational health and safety and the organisation's occupational health and safety policies, procedures and programs</td>
<td>• relevant provisions of occupational health and safety legislation and codes of practice are accurately and clearly explained to the work group&lt;br&gt;• information on the organisation's occupational health and safety policies, procedures and programs is provided in a readily accessible manner and is accurately and clearly explained to the work group&lt;br&gt;• information about identified hazards and the outcomes of risk assessment and risk control procedures is regularly provided</td>
</tr>
<tr>
<td>2. Implement and monitor participative arrangements for the management of occupational health and safety</td>
<td>• organisational procedures for consultation over occupational health and safety issues are implemented and monitored to ensure that all members of the work group have the opportunity to contribute&lt;br&gt;• issues raised through consultation are dealt with and resolved promptly or referred to the appropriate personnel for resolution&lt;br&gt;• the outcomes of consultation over occupational health and safety issues are made known to the work group promptly</td>
</tr>
<tr>
<td>3. Implement and monitor the organisation's procedures for identifying hazards and assessing and controlling risks</td>
<td>• existing and potential hazards in the work area are identified and reported so that risk assessment and risk control procedures can be applied&lt;br&gt;• work procedures to control risks are implemented and adherence to them by the work group is monitored&lt;br&gt;• existing risk control measures are monitored and results reported regularly&lt;br&gt;• inadequacies in existing risk control measures are identified in accordance with the hierarchy of control and reported to designated personnel&lt;br&gt;• inadequacies in resource allocation for implementation of risk control measures are identified and reported</td>
</tr>
<tr>
<td>4. Implement the organisation's procedures for dealing with hazardous events</td>
<td>• workplace procedures for dealing with hazardous events are implemented whenever necessary to ensure that prompt control action is taken&lt;br&gt;• hazardous events are investigated to identify their cause in accordance with investigation procedures&lt;br&gt;• control measure to prevent recurrence and minimise risks of hazardous events are implemented</td>
</tr>
<tr>
<td>5. Implement and monitor the organisation's procedures for providing occupational health and safety training</td>
<td>• occupational health and safety training needs are identified accurately, specifying gaps between occupational health and safety competencies required and those held by work group members&lt;br&gt;• arrangements are made for fulfilling identified occupational health and safety training needs</td>
</tr>
<tr>
<td>6. Implement and monitor</td>
<td>• occupational health and safety records for work area are</td>
</tr>
</tbody>
</table>
the organisation's procedure for maintaining occupational health and safety records | accurately and legibly completed
---|---
• aggregate information from the area's occupational health and safety records is used to identify hazards and monitor risk control procedures within work area

Range of Variables

This unit is based on the National Guidelines for Integrating Occupational Health and Safety Competencies into National Industry Competency Standards NOHSC: 1994

In accordance with all relevant occupational health and safety legislation, particularly:

- general duty of care
- requirements for the maintenance and confidentiality of records of occupational injury and disease
- provision of information and training
- regulations and codes of practice relating to hazards present in the work area
- health and safety representatives and occupational health and safety committees
- issue resolution

Hazardous events include:

- accidents
- fires/emergencies

Procedures for dealing with them include:

- evacuation
- chemical containment
- first aid procedures

Workplace procedures include those for:

- inspection
- housekeeping
- consultation processes, either general or specific to occupational health and safety
- training and assessment
- specific hazard policies and procedures
- occupational health and safety information
- occupational health and safety record keeping
- maintenance of plant and equipment
- purchasing of supplies and equipment
- counselling/disciplinary processes

Evidence Guide

Critical aspects of evidence:

- occupational health and safety policies, procedures and programs are in place in the organisation and are effective in establishing a safe working environment
- holds required certification - current level 2 First Aid Certificate or equivalent
- competence in CHCORG4A “Follow the organisation’s occupational health and safety policies” is a prerequisite for this unit

Underpinning knowledge:

- working knowledge, consistent with the elements of competence, of all applicable occupational health and safety legislation and codes of practice
- basic first aid including knowledge of:
  - cardiopulmonary resuscitation
  - broken bones
  - poisons
  - bandaging
• bleeding
• understanding the hierarchy of control the preferred order of risk control measures from most to least preferred, that is, elimination, engineering controls, administrative control, and lastly, personal protective equipment
• understanding of the significance of equal employment opportunity principles and practices for occupational health and safety
• the significance of other management systems and procedures for occupational health and safety
• literacy levels and communication skills of work group members and consequent suitable communication techniques
• occupational health and safety legislation and codes of practice
• risk control hierarchy and methods
• communication skills with the range of workers, including those with low levels of English literacy
• organisational policies and procedures
• organisational procedures for monitoring, training

Underpinning skills:
• effective communication and interpersonal skills including:
  ◊ language competence
  ◊ literacy and reading competence
• negotiation
• work planning and management

Resource implications:
• access to appropriate workplace where assessment can be conducted

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• it is recommended that assessment take place on one or more than occasions
• competence may be demonstrated working individually or under guidance of or as a member of a team with specialist occupational health and safety staff or managers

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCORG18A Establish, maintain and evaluate the organisations occupational health and safety system

This unit is based on the National Guidelines for integrating Occupational Health and Safety competencies into National Industry competency standards [NOHSC: 1994].

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Establish and maintain the framework for the occupational health and safety system in the area of responsibility | • occupational health and safety policies are developed  
• occupational health and safety responsibilities are clearly defined, allocated and included in job descriptions  
• financial and human resources for the operation of the occupational health and safety system are identified, sought and/or provided in a timely and consistent manner  
• information on the occupational health and safety system and procedures for the area of responsibility is provided and explained in a form which is readily accessible to employees |
| 2. Establish and maintain participation arrangements for the management of occupational health and safety | • appropriate consultative processes are established and maintained in consultation with employees and their representatives  
• issues raised through participation and consultation are dealt with and resolved promptly and effectively  
• information about the outcomes of participation and consultation is provided in a manner accessible to employees |
| 3. Establish and maintain procedures for identifying hazards | • existing and potential hazards are correctly identified  
• a procedure for ongoing identification of hazards is developed and integrated within systems of work and procedures  
• hazard identification is addressed at the planning, design and evaluation stages of any change in the workplace |
| 4. Establish and maintain procedures for assessing risks | • risks presented by identified hazards are correctly assessed  
• a procedure for ongoing assessment of risks is developed and integrated within systems of work and procedures.  
• activities are monitored to ensure that this procedure is adopted effectively  
• risk assessment is addressed at the planning, design and evaluation stages of any change |
| 5. Establish and maintain procedures for controlling risks | • measures to control assessed risks are developed and implemented  
• when measures which control a risk at its source are not immediately practicable, interim solutions are implemented until a permanent control measure is developed  
• activities are monitored to ensure that the risk control procedure is adopted effectively throughout the area of managerial responsibility  
• risk control is addressed at the planning, design and evaluation stages of any change  
• inadequacies in existing risk control measures are identified and resources enabling implementation of new measures are sought and/or provided |
| 6. Establish and maintain | • potential hazardous events are correctly identified |
organisational procedures for dealing with hazardous events

- procedures which would control the risks associated with hazardous events and meet any legislative requirements as a minimum are developed
- appropriate information and training is provided to all employees

7. Establish and maintain an occupational health and safety training program

- an occupational health and safety training program is developed and implemented to identify and fulfil employees' occupational health and safety training needs

8. Establish and maintain a system for occupational health and safety records

- a system for keeping occupational health and safety records is established and monitored

9. Evaluate the organisation's occupational health and safety system and related policies, procedures and programs

- the effectiveness of the occupational health and safety system and related policies, procedures and programs is assessed
- improvements to the occupational health and safety system are developed and implemented
- compliance with occupational health and safety legislation and codes of practice is assessed

**Range of Variables:**

*Areas of managerial responsibility include:*
- an entire enterprise
- a department of an enterprise

*In accordance with all relevant occupational health and safety legislation particularly:*
- general duty of care
- requirements for the maintenance of records of occupational injury and provision of training and information
- dealing with occupational health and safety committees
- health and safety representatives
- issue resolution
- to be exhibited within area of managerial responsibility which might be an entire enterprise or department of an enterprise
- involves application of relevant occupational of health and safety legislation and codes of practice, particularly general duty of care requirements for the maintenance of records of occupational injury and disease, provision of information and training, and that dealing with occupational health and safety committees, health and safety representatives and issue resolution

*Processes for consultation include:*
- occupational health and safety committees
- consultation with health and safety representatives, issue resolution procedures
- participative/consultative procedures conducted by supervisory staff within the area of managerial responsibility

*Monitors of activities may include:*
- review of written reports
- performance appraisal
- auditing procedures
Hazardous events include:
- accidents
- fires
- emergencies such as chemical spills or bomb scares

Procedures for dealing with them:
- evacuation
- chemical containment
- first aid procedures

Relevant positions for implementing the occupational health and safety system will include:
- managers supervisors
- occupational health and safety officer/manager
- first aid officers

Occupational health and safety relevant information to be communicated includes:
- worker's compensation insurance details
- rehabilitation policy

Evidence Guide:

Critical aspects of assessment:
- competence may be demonstrated working individually, or under the guidance of, or as a member of a team with, specialist occupational health and safety staff, managers or consultants
- evidence of detailed knowledge of all relevant occupational health and safety legislation and codes of practice and how they will be implemented within the area of responsibility is required
- evidence of understanding of the hierarchy of control the preferred order of risk control measures from most to least preferred, that is, elimination, engineering controls, administrative controls and, lastly, personal protective equipment is required
- evidence of understanding of the significance of equal employment opportunity principles and practices for occupational health and safety is required
- evidence of understanding of the significance of other management systems and procedures for occupational health and safety is required
- evidence of knowledge of literacy levels and communication skills of employees in the area of managerial responsibility and consequent suitable communication techniques is required

Underpinning knowledge:
- occupational health and safety legislation and codes of practice
- risk control hierarchy and methods
- management systems
- workplace procedures for fire drill etc.
- lifting requirements
- universal precautions
- first aid responses for adults and children
- relevant accreditation principles eg. QIAS and service standards

Underpinning skills and attitudes include:
- communication skills
- workplace language and literacy

Resource implications:
- access to an appropriate workplace or simulated workplace setting where assessment can be conducted
Consistency in performance:
- assessment may include observations, questioning and evidence gathered in the workplace
- it is recommended that assessment take place on more than one occasions

Context of assessment:
- this unit may be assessed on the job or under simulation
### CHCOR19A Develop and maintain the quality of service outcomes

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
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</table>
| **1. Evaluate outcomes for clients accessing the service** | - the service's philosophy, goals and objectives based on client service delivery are clearly stated and used to design criteria for evaluation  
- the effects of services on all clients are investigated and documented  
- the quality of the program is monitored according to relevant standards of the service and industry  
- a range of appropriate processes are used to review client service outcomes  
- feedback mechanisms are established and used to involve all users of the service  
- mechanisms are established to provide clients with information about evaluation results  
- all relevant parties are involved in evaluation processes  
- information gained from the evaluation is communicated to relevant parties |
| **2. Plan and implement changes/strategies to improve outcomes** | - a plan to develop the quality of service is designed and implemented with others  
- policies are designed and implemented to foster quality service  
- information about the plan and the processes to be used are provided to relevant parties  
- a plan to develop the quality of service is designed to ensure participation by all those involved  
- complaints are responded to, investigated and used as feedback to improve outcomes  
- priorities, immediate goals and long term goals for improving quality of service are included in plan  
- resources required are obtained or requested from appropriate sources |
| **3. Ensure client service standards and codes of practice** | - service criteria regarding quality are regularly communicated to all stakeholders  
- procedures are established to check that appropriate practice is carried out  
- good practice is modelled and demonstrated to all workers  
- information about good practice is provided to all stakeholders  
- examples of good practice are promoted to workers  
- workers are regularly reminded of service standards and organisational expectations  
- issues are confronted with workers and a plan for improvement developed  
- a focus on outcomes for the client is promoted |
4. Manage quality assurance processes

- appropriate planning is undertaken to ensure involvement of all parties in quality improvement processes
- continuous improvement processes are defined and their implementation is monitored to ensure quality client service delivery
- processes are implemented to promote continuous improvement in the workplace
- the outcomes of client services are continuously evaluated for impact on the local community

Range of Variables:

The process of evaluating outcomes for clients will vary according to the location of the service. Processes may include:

- observation
- review discussions
- gathering feedback from clients via surveys
- collating observations of workers and interpreting data

The effects of services on different clients may include:

- social/emotional/physical/wellbeing
- whether clients needs are met
- changing the circumstances for the client

Relevant standards which maybe used to monitor a service may be:

- licensing requirements
- quality assurance
- legal/legislative requirements
- accreditation principles
- service guidelines and policies
- occupational health and safety
- guidelines of funding body

Relevant parties/stakeholders may include:

- carers and significant others of clients
- management committee
- funding bodies
- other professionals
- workers
- clients
- community members
- experts

A plan to develop the quality of service may include the development of:

- effective reporting and complaints mechanisms
- staff training/development of management skills
- meetings and information exchanges

Procedures to check appropriate practice may include:

- observation
- gathering feedback from all involved
- coparticipating
- meetings-discussion
- auditing by outside experts
Quality assurance systems may include:
- continuous improvement systems
- accreditation systems
- quality systems
- organisation’s own internal system

Evidence Guide:

Critical aspects of assessment:
- evaluation processes are based on relevant service and industry standards
- application of a model of quality service delivery

Interdependent assessment of units:
- this unit is recommended to be assessed with other units: CHCRF23A Respond to problems and complaints about the service; CHCRF21A Promote equity in access to the service; CHCP&R4 Develop and implement policy

Underpinning knowledge:
- structure of service/organisation
- network of relevant services
- service guidelines
- knowledge of legal/legislative requirements
- Quality assurance processes relevant to service type
- Mission statements, philosophical statements of organisation
- community needs
- needs of clients of all abilities, disabilities
- cultural background, values and beliefs
- up to date knowledge of good practice
- role model
- ethics, duty of care
- rights of clients
- relevant accreditation principles eg. QIAS and service standards

Underpinning skills:
- cross cultural communication
- observation and analysis of information
- goal setting
- data collection
- leadership
- persuasive communication

Resource implications:
- access to an appropriate workplace or simulated workplace setting where assessment can be conducted

Consistency in performance:
- assessment may include observations, questioning and evidence gathered in the workplace
- it is recommended that assessment take place on more than one occasion

Context of assessment:
- this unit may be assessed on the job or under simulation
CHCORG20A Promote and represent the service

<table>
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<tr>
<th>Element</th>
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</table>
| 1. Promote community awareness of the clients, their needs and their importance | • presentations are prepared and delivered in a way appropriate to the target group  
• presentations are designed to be relevant to the concerns/interests of the target group |
| 2. Promote the service to increase its profile in the community | • stakeholders and supporters in the community are identified and their particular interest and resources are identified  
• communications are targeted to areas where the profile needs raising or clarifying  
• opportunities for the community to view and contribute to the service are facilitated  
• a range of materials and resources providing information to the community are prepared and used  
• a range of different methods of promotion are used  
• a strategy to review the profile of the service in the community is developed and in use  
• information campaigns are developed to address particular issues, as required  
• opportunities for involvement in the community are considered and utilised as relevant  
• staff participation in appropriate forums is encouraged  
• press and other publicity is utilised appropriately  
• accurate and positive information is provided to the community to develop a positive community image |
| 3. Represent the service | • the service's philosophy, purpose, policies and procedures are represented clearly and accurately  
• questions and concerns about the service are responded to and followed up  
• the service's need for resources is represented to appropriate forums/organisations  
• the perspective and experience of the service is represented to relevant forums |
| 4. Respond to negative publicity and perceptions, as required | • negative publicity and perceptions are analysed for potential outcomes and implications for the service  
• spokespersons are listened to carefully in order to develop an understanding of their position  
• advice is sought from stakeholders and supporters in the community if required  
• a spokesperson is nominated to represent the service if required  
• communications used do not exacerbate existing negative perceptions  
• organisational policies are reviewed in light of issues raised, as appropriate  
• a strategy to deal with negative publicity and perceptions is developed and implemented |
Range of Variables:

Promotion methods may include:
- public speaking
- articles and reports in local media
- press releases
- liaison
- lobbying
- leaflets
- radio interviews
- posters

Presentations may need to vary according to the needs of the target group. These variables may include:
- age
- language
- cultural beliefs and practices

Aspects that may be promoted include:
- needs for community support
- contribution of families to the workplace and/or community
- examples of achievements
- breaking down stereotypes
- dispelling myths
- changing needs in the community with regard to child care needs

Promotion and representation of the service may be targeted to:
- the local community
- specific stakeholders or key people
- specific groups within the community
- organisations who have a related role
- existing and potential referral sources
- parent groups
- service users
- government agencies
- existing and potential funding sources
- local schools etc.

Representation may be required in a range of contexts such as:
- meetings and forums
- consultation processes
- enquires to the service
- training opportunities
- conferences
- parent seminars/evenings
- community education

Managing negative publicity, as well as promoting a service may depend on:
- the financial resources of the service/organisation
Evidence Guide:

**Critical aspects of assessment:**
- developing and delivering an effective and convincing promotion of the organisation

**Underpinning knowledge:**
- current trends in client service delivery
- range of child care services and their provision of service
- ideas about issues where promotion is required relevant to the service
- awareness of current issues/concerns/debates in the child care arena
- relevant accreditation principles and service standards

**Underpinning skills:**
- communication skills, both written and spoken
- negotiation skills
- conflict resolution skills
- basic skills in presenting information clearly and with impact
- commitment to service/field
- networking skills
- being able to listen to and investigate other points of view about children's services and their practices

**Resource implications:**
- access to appropriate workplace where assessment can be conducted, or
- simulation of realistic workplace setting for assessment

**Consistency in performance:**
- assessment may include observation, questioning and evidence gathered from the workplace environment
- assessment may be conducted on one or more occasions but should include demonstration of the critical aspects of assessment and include at least three different methods of promotion

**Context of assessment:**
- assessment may be on the job or under simulation
# CHCORG21A Act as a resource to other services

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Identify needs/issues in consultation with the service | • all relevant people/stakeholders are consulted to identify main issues and relevant information  
• different perceptions about issues are identified  
• contextual pressures, restraints and resources relevant to issues are identified  
• areas of common understanding are identified |
| 2. Provide information and advice | • appropriate and relevant information materials are developed and provided in suitable formats and a timely manner to address issues and needs of services  
• meetings are organised and facilitated  
• the confidence of workers in the services is appropriately safeguarded and developed  
• alternative processes/structures to improve the service are recommended  
• innovative models for service delivery are developed and communicated  
• services which can offer additional advice or information are identified and recommended  
• appropriate information is provided to extend peoples awareness of potential outcomes and strategies |
| 3. Develop and implement models and strategies, in consultation with the service | • a range of options are discussed and an action plan is developed with relevant people  
• a process for review and follow up is included in the plan  
• strategies are implemented with service personnel as requested and needed  
• resources to implement the action plan are identified and the service supported to gain them  
• demonstrations are provided as required to assist implementation of new approaches  
• appropriate support coaching is provided to develop necessary competence  
• mediation and negotiation is undertaken as required to assist in resolving any conflict |

## Range of Variables:

*Identification of needs/issues in the service may be via:*
- observation of environment, interactions, practices, equipment, program  
- conversations  
- meetings  
- collecting and analysing data eg. promotional materials, demographic information, policies, programs  
- analyse feedback from parents, community members etc.  
- visiting service

*Issues and needs of services may include:*
- development of administration and management structures and processes  
- viability of service  
- establishment of service  
- communication difficulties
• unresolved conflict
• accountability

*Information may be provided to the service through:*
• telephone
• regional/local meetings
• written materials
• face to face

*Conflict may be between:*
• staff and management
• service and sponsoring body
• service and funding/legislative representative
• staff and staff
• service and community group

*Evidence Guide:*

*Critical aspects of assessment:*
• capacity to integrate a range of current thinking and practice in the area of service delivery to define an operational framework which meets client needs and is consistent with organisational practice
• capacity to act as an expert to influence others

*Underpinning knowledge:*
• management structures and processes relevant to the service type
• industrial relations-explain/interpret award, rights and responsibilities of different parties, places to contact for advice
• legislative requirements for service type
• the development of policies and procedures
• employment processes
• budgeting, taxation, superannuation, wages
• role of external resource person
• up-to-date knowledge of issues in the sector
• group dynamics of teams
• organisational cultures
• occupational health and safety
• resources required
• relevant accreditation principles and service standards

*Underpinning skills:*
• conflict resolution and mediation
• monitoring, coaching, demonstrating
• promotion of services
• meetings-chair, facilitate
• high level communication skills
• developing written information resources
• research information that is required
• reflective practice-awareness of personal bias
• submission writing
• lobbying

*Resource implications:*
• access to appropriate workplace where assessment can be conducted, or
• simulation of realistic workplace setting for assessment
Consistency in performance:
• assessment may include observation, questioning and evidence gathered from the workplace environment
• assessment may be conducted on one or more occasions but should include demonstration of the critical aspects of assessment and include at least three different methods of promotion

Context of assessment:
• assessment may be on the job or under simulation
CHCP&R1A Participate in policy development

Participating in research and consultation processes which inform policy development.

<table>
<thead>
<tr>
<th>Element</th>
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</table>
| 1. Assist in the policy development of the organisation | • information on impact of organisational policies on clients and relevant others is provided to supervisor when requested  
• views and opinions of clients and relevant others are provided to supervisor when requested  
• concerns regarding job responsibilities are reported to supervisor  
• suggestions on changes to policy are related to supervisor when requested |
| 2. Contribute to collection of data for research purposes | • undertake data collection in the manner prescribed  
• research and consultation with clients and relevant others is carried out under guidance of supervisor  
• organisational policies and procedures are to be followed when conducting research and consultation  
• research and consultation is completed within established timeframes  
• information is gathered in a manner which respects cultural and individual differences  
• confidentiality of information gathered is maintained  
• information gathered is provided to supervisor in the format requested |

Range of Variables

Information and feedback for policy development processes may be provided:
• verbally  
• or written  
• at formal or informal meetings

Relevant others may be:
• family members  
• other services

Consultation with clients may be:
• in language appropriate to the client group spoken, signed, gestures  
• using oral, written or visual methods  
• using third party translator/interpreter

Research and information may be sought on:
• emergencies  
• occupational health and safety  
• referrals  
• reporting  
• philosophy  
• goals, objectives, targets  
• recording  
• accountability  
• code of conduct and ethical behaviour  
• duty of care
Research and consultation may include:
- asking set questions as specified by supervisor
- helping client or relevant others to fill in a questionnaire

Evidence Guide

Critical aspects of assessment:
- worker should demonstrate participation in policy development:
  ◊ in relation to the worker's own area of responsibility
  ◊ employing either verbal or written means to provide information and feedback
  ◊ as part of a team, or as required in the workplace

Underpinning knowledge:
- organisational policies impacting on the worker's own area of responsibility
- aspects of government policies directly related to own area of responsibility
- the limits of the worker's role and competence

Underpinning skills:
- questioning and clarification, on a familiar workplace issue/topic/research policy. Language used may be English or a community language
- report writing, on a familiar workplace issue/topic/research policy. Reports may vary in complexity from filling in a set form to writing a short report. Literacy support available in the workplace to complete reports may vary from support and assistance from a supervisor to no support available. Language used may be English or community language
- group participation

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace environment
- assessment may be conducted on one occasion but should include demonstration of the critical aspects of assessment

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCP&R2A Contribute to policy development

Developing and analysing policies which impact on the client group and the work of the organisation.

<table>
<thead>
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</table>
| 1. Review existing policies | • relevant organisational and other policies are identified and assessed for their relevance and effectiveness to the organisation's objectives  
• clients and other stakeholders are consulted about their views on policies  
• reviews of policies are documented and presented in a format appropriate to the purpose of the review, the context, and the receiver |
| 2. Contribute to research for policy advice | • research and consultation strategies appropriate to the worker's role in the research process are identified, planned and implemented within time frames, resource constraints and agreed processes  
• research and consultation outcomes are collated, reported and presented in a format appropriate to the research process, the purpose of the research, the context and the receiver  
• factors impacting on the quality or outcomes of the research or consultation are identified and incorporated in reports |
| 3. Provide briefing materials on policy issues | • briefing materials are prepared as required in a format appropriate to the audience, the purpose and the context  
• on the worker's and organisation's role and expertise are drawn on for briefing materials  
• reasoned argument and evidence are incorporated into briefing materials |
| 4. Promote informed policy debate | • strategies to stimulate informed debate appropriate to the worker's role in policy development, community education or client service delivery are identified in consultation with other workers and management  
• strategies to stimulate informed debate are implemented within time frames, resource allocations and agreed processes  
• where necessary, strategies are implemented to translate policy materials into language/s easily understood by clients and other stakeholders  
• strategies are developed which enable exchange of views and information between policy initiators, clients and other stakeholders |

### Range of Variables

Policies are those which are relevant to the delivery of services by the organisation and could include those developed internal or external to the organisation.

*Research undertaken could be:*  
• survey  
• qualitative  
• quantitative  

*Information gathering and consultation techniques may include:*
• interview structured, semi-structured and unstructured, group and individual
• conversation by phone or face to face
• observation and listening
• collection of materials eg. printed material and videos
• attendance at workshops, meetings and forums
• questionnaires and other basic survey instruments

Strategies to promote informed debate will involve:
• employing a range of communication styles, modes and media
• employing any of the consultation techniques identified in the Range of Variables
• employing networking strategies

Evidence Guide

Critical aspects of assessment:
• application to policies within own organisation
• application to policies within networks or associations
• policies directly related to own work role and areas of expertise
• application for target groups relevant to the organisation
• involvement with stakeholders relevant to the organisation and the policy issue under consideration

Interdependent assessment of units:
• this unit may be assessed with CHCP&R3A Undertake research activities

Underpinning knowledge:
• organisational policies impacting on the worker, the organisation and its target groups
• government and other policies impacting on the issue under consideration, and the organisation and its target groups
• the contexts for policies, people and the organisation
• research and consultation techniques
• the limits of the worker’s own role and competence and the organisation’s role

Underpinning skills:
• analysis of evidence and arguments
• reasoning, including identification of implications and consequences of particular courses of action
• applied consultation and research methodologies
• report writing, including translation of complex concepts into simple language or images
• public speaking addressing a group
• group participation

Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• it is recommended that assessment take place on one or more than occasions to enable assessment of all aspects of policy development to take place

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCP&R3A Undertake research activities

Implementing research relevant to operations of the organisation.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</thead>
</table>
| 1. Prepare a research plan                   | • the views and interests of stakeholders are reflected in the research methodology and it and is compatible with ethical considerations  
• the research methodology is selected for suitability to the needs, purposes and resources and maximising credibility of outcomes  
• research strategies are selected and used which are appropriate to the client group, the subject matter being researched, the resources available and the outcomes sought  
• strategies for validating research outcomes are incorporated within the research plan |
| 2. Implement appropriate research strategies  | • resources needed to conduct research are determined and allocated  
• all relevant information is collected in a timely manner and recorded and stored to ensure validity, confidentiality and security  
• a representative range of people and groups with an interest in the issues is identified and consulted in appropriate ways to ensure the validity of outcomes  
• consultation is undertaken according to the agreed practices and protocol of own and other agencies  
• consideration of cultural sensitivities and ethical issues is imbedded in all consultation                                |
| 3. Organise and analyse information          | • information is organised in a form which allows analysis and is suitable for the purpose of the research  
• patterns and explanations developed are derived from the data to ensure validity and reliability                                                                 |
| 4. Report the findings of the research       | • complete and accurate details of the research methodology, information and analysis are reported in an accessible and useable style and format  
• opportunities are provided for the validation of the research findings  
• the results of the research are reported and made available to all relevant stakeholders                                                                 |

### Range of variables

*The contexts for undertaking research may include:*  
- preparation of a range of organisational information for policy development, strategic planning, marketing and promotion services, planning new services, reviewing existing services, providing advice to management  
- responsibility for research specific to a service, its clients, interests and relationship with the wider community  
- responsibility for research for specific client interests and issues
Key people or stakeholders may be:
- within the organisation
- in other areas of delivery and other services, agencies
- in the education/training field
- other specialists
- management
- community leaders
- clients of the service delivery

Evidence Guide

This unit is based on the draft national correctional services standards unit of the same name.

Critical aspects of assessment:
- carrying out research activities that are directly relevant to the organisation

Underpinning knowledge:
- current and suitable research methodologies
- consultation methods, protocols and practice
- information systems, manual and electronic
- report presentation
- cultural implications of research methods
- cultural analysis of information
- cultural knowledge and ownership issues

Underpinning skills:
- consultation methods
- complex communication
- negotiation with a wide range of known and unknown stakeholders
- interpretation and analysis of data
- networking
- written/oral presentation

Resource implications:
- access to appropriate workplace where assessment can take place

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- it is recommended that assessment take place on one or more occasions but must include all aspects of research activities - preparing, implementing, analysing, and reporting on research

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCP&R4A Develop and implement policy

Developing and applying policy initiatives in the workplace.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Research and consult with others to develop policies | • existing organisational, government and other policies relevant to the issue are evaluated to determine their currency and relevance for the organisation and its clients  
• appropriate research and consultation which will contribute to policy development is undertaken and documented in accordance with organisational policies and procedures  
• relevant stakeholders are consulted throughout the policy development process to ensure relevance and acceptance of the product  
• appropriate mechanisms are provided to facilitate open constructive discussion about policy issues and their possible resolution  
• policies are developed which reflect the culture, values and objectives of the organisation  
• resourcing implications of implementation and review mechanisms are included in policies |
| 2. Test draft policies | • an appropriate consultation plan is developed and implemented to test and review draft policies  
• policy implementation issues including monitoring and evaluation processes are discussed with relevant personnel and the policy modified as appropriate  
• changes to policies are notified to those affected in time to take remedial action |
| 3. Develop policy materials | • policy materials are prepared in a format and style to facilitate understanding and implementation of the policy  
• policy proposals are developed which acknowledge a range of sources, interest groups and applications |
| 4. Implement and review policies | • a policy implementation plan is developed and followed to ensure maximum impact of new and revised policies  
• strategies to ensure wide dissemination of policy information is developed and utilised  
• evaluation plan is developed and implemented to ensure ongoing review of policies and maximum input from clients and stakeholders  
• policies are reviewed in accordance with organisational policies and procedures  
• policies relevant to the organisation’s operation are promoted in an appropriate manner utilising a range of strategies to key clients and stakeholders  
• feedback received during marketing and promotion are utilised in the review of policies |
Range of Variables:

*Appropriate research may include:*
- state, national or local level
- written or oral sources of information

*Stakeholders may include:*
- colleagues
- clients
- families and significant others
- other organisations
- funding bodies
- community groups
- management
- government agencies

Evidence Guide

This unit is based on the Adult and Community Education National Competency Standards unit, "Develop, negotiate and initiate staffing policies."

*Critical aspects of assessment:*
- consultation with others
- draft policies are tested before implementation
- policies are reviewed for their effectiveness once implemented

*Underpinning knowledge:*
- principles and practices of policy development
- relevant policy at national and state level
- key stakeholders at local, national and state level
- organisational consultation processes
- evaluation and review processes
- organisational business and corporate plans and philosophy
- funding bodies and their requirements

*Underpinning skills:*
- documentation and report writing
- policy development
- research and consultation
- promotion

*Resource implications:*
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

*Consistency in performance:*
- assessment may include observations, questioning and evidence gathered from the workplace
- assessment may take place on one occasion but must include all stages of developing and implementing policy

*Context of assessment:*
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
## CHCP&R5A Manage research activities

Initiating, managing and acting upon research and the resultant recommendations.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Initiate research efforts | • the need for further research is identified and defined and proposals developed in consultation with relevant stakeholders  
• research concepts, designs and proposals are developed and tested with relevant stakeholders according to needs, timeframes, resources and desired outcomes  
• the feasibility of research proposals is assessed against determined criteria  
• opportunities are provided to encourage participation in research activities  
• issues related to ethics, validity and reliability are incorporated in research designs |
| 2. Identify and acquire resources | • strategies are devised and implemented to obtain and make use of the necessary human, financial and physical resources to ensure research outcomes  
• all written and oral submissions are made to obtain the resources and address the standard requirements of funding and the usual practice of the organisation |
| 3. Supervise research being undertaken | • a work plan and budget is implemented taking account of resource and time constraints and negotiated with all research workers, and participants, if relevant  
• progress against the work plan and budget is monitored on a regular basis and changes made as necessary  
• opportunities for feedback, support, advice and debriefing for research workers are created and acted on to ensure the quality of the outcomes  
• opportunities are created for stakeholders to evaluate the research findings and process |
| 4. Interpret and act on analysis of research | • the analysis and recommendations are derived from the research and satisfy the desired outcomes  
• the validity and reliability of the research findings is tested against the original research plan and confirmed with key stakeholders  
• where appropriate, recommendations are made for actioning research results |

### Range of Variables

The contexts for initiating and coordinating research include:

- preparation of a range of data:
  - policy making
  - strategic planning
  - marketing
  - service development and delivery

Initiating and coordinating research will be carried out within requirements established by:

- research codes of ethics and protocols
- organisational mission, outcomes and objectives
- organisations program standards
Criteria to assess the research proposal will include:
- the size and nature of the research sample ie. who and how many will be researched
- research methods
- purpose of research and for whom
- the human, financial and physical resources required
- the nature and scope of the information to be gathered
- the timetable

Effectiveness of the research will be based on:
- the value of its usefulness
- the feasibility of implementing the recommendations
- the findings of previous and current research
- available time and resources
- the value of the information and data
- the quality and credibility of the methodology

Resources will include:
- specialist researchers
- funding
- previous research data written, oral and audio-visual sources
- equipment eg. computer, electronic recording equipment etc.

Funding proposals will include:
- submissions
- tenders
- expressions of interest
- sponsorship
- fee for service
- contracting

Funding sources can include:
- government state and federal
- philanthropic agencies
- private business and sponsorship
- bequests, donations and other private grants
- money raised by fundraising events
- sale of resources

Support and promotion will include:
- the promotion and dissemination of information about the benefits of the research
- organisation of meetings/forums for broader involvement and interaction with stakeholders
- recruitment of people with research skills and experience
- recruitment of resources and funding

Evidence Guide

Critical aspects of assessment:
- ability to design research
- ability to interpret and analysis of research
- demonstrated ability to complete submission process
- manages people in a research environment
Underpinning knowledge:
- management of research models/practices
- project management models/practices
- research ethics and codes of conduct
- consultation models/practices
- resource management models/practices
- people management models/practices

Underpinning skills:
- development of consultation protocols
- facilitation of consultation
- high level of communication
- negotiation
- management of equipment, materials funding
- use of technology
- analysis

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- assessment may take place on one occasion but must include evidence of all aspects of managing research activities
- competence may be demonstrated working individually or under guidance of or as a member of a team with specialist occupational health and safety staff or managers

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
CHCP&R6A Coordinate policy development

Coordinating policy development processes including staff supervision monitoring existing organisation policies, managing policy evaluations, and providing policy advice.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Coordinate policy development | • policy development parameters, procedures, resources and timeframe are established and confirmed  
• consultation processes with clients, workers and external personnel are developed and utilised  
• inter-organisation cooperation in policy development is examined with a view to maximising available resources  
• supervision and support is provided to workers engaged in policy activities  
• resource allocations are monitored against approved budget |
| 2. Monitor organisation policies | • operational staff and associated organisations are regularly consulted on existing organisation policies  
• mechanisms are established to monitor inter-organisation policies and efficiently resolve gaps and problems  
• periodic status reports are provided to decision makers on the relevance of policies, on policy gaps and on recommended enhancements, and where appropriate, incorporated into policy documentation |
| 3. Provide policy advice       | • draft policies are prepared and presented to management according to established practice and management implementation requirements  
• policy evaluation procedures and time schedules are prepared and, following approval, implemented  
• processes are developed to enable the ongoing evaluation and monitoring of policy including facilitation of input from client groups, other organisations and stakeholders |

Range of Variables

**Management implementation requirements may include:**
• analysis of social, political and economic factors and trends  
• strategies to avoid discrimination  
• balanced assessment of actual and potential impacts for the organisation  
• analysis of linkages with other policies and legislation  
• media, language and presentation styles appropriate to the audience

**Strategies to promote informed debate may involve employing:**
• a range of communication styles, modes and media  
• lobbying strategies  
• consultation strategies  
• networking strategies

**Policy development processes may be related to:**
• specialist work with particular target eg. people with disabilities, Aboriginal people  
• application of specialist occupations eg. physiotherapy, law, psychology to work with or to the benefit of client groups  
• advanced work in particular issue areas eg. law, income, security
• work which integrates particular issues and particular target groups eg. housing people of NESB, legal issues for Aboriginals

Policy development processes are managed for:
• an organisation or service
• peak bodies, networks or associations
• a range of government departments or organisations
• and with reference to all target groups of relevance to the organisation or network

Evidence Guide

Critical aspects of assessment:
• managing organisation or network responses to policy initiatives by other stakeholders
• respond to initiatives by stakeholders
• using a variety of research and consultation strategies
• working as part of a team or as a sole worker
• distinguish between facts, hypotheses and opinions
• present and support a judgement, position of argument
• maintain direction and purpose within the context of competing or conflicting demands
• determining processes which are consistent with, and contribute to, objectives
• application of management competencies to policy tasks
• sophisticated analysis of a range of information and conflicting or competing perspectives and objectives
• strategic decision making which integrates purpose and effectiveness, and takes account of resource constraints

Underpinning knowledge:
• issues impacting on clients and their place in a social, political and economic context
• government and other policies as they impact on clients, their families and communities
• needs, rights and responsibilities of clients
• needs, rights and responsibilities of families, other care givers and services in relation to clients
• legislation impacting on clients, workers and organisations
• theories of human development
• the effects that values, beliefs and attitudes have on aspects of work
• the effects that culture, age, gender, sexuality, ability, class, race, religious and political beliefs may have on values, attitudes, perspectives and approaches to the situations of clients
• concepts of culture and sub-cultures
• theories of work practice
• the decision making structure, processes and delegated authorities of the organisation, network or group of organisations
• existing policies within the organisation or group of organisations, and of other stakeholders, and legislation impacting on the policy issue under consideration

Underpinning skills:
• judging and using the most appropriate communication medium for a particular situation
• interpersonal communication, in particular listening, clarifying, questioning, confronting, providing information, interpreting non verbal communication, demonstrating understanding
• conflict resolution and mediation
• communicating with people with diverse cultural, linguistic and educational backgrounds
• a high level of literacy and the ability to write for a range of purposes and audiences
• advanced communication skills, including liaison, negotiation and advocacy
• public speaking
• planning and coordination of complex activities and processes
Resource implications:
• access to appropriate workplace where assessment can be conducted or
• simulation of realistic workplace setting for assessment

Consistency in performance:
• assessment may include observations, questioning and evidence gathered from the workplace
• it is recommended that assessment take place on more than one occasion to enable all aspects of coordinating policy development to be assessed

Context of assessment:
• this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
### CHCP&R7A Manage policy development

Establishing, coordinating and promoting strategic policy development in the context of changing social and political environment.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Identify future directions in organisational services | • major social issues impacting on service provision are analysed and interpreted for effects on service provision  
• liaison is established with key stakeholders to identify future directions, coordinate the organisation's responses to emerging issues and ensure effective communication  
• relevance of agency services to high need individuals and groups are assessed and advice prepared in an ongoing manner  
• key national and state policies are closely monitored for relevance |
| 2. Manage policy development | • broad agency directions and corporate goals are developed using appropriate consultation processes  
• organisational policy is assessed against broad directions for relevance, gaps and compliance and any priorities and processes for reviewing, amending or developing policy are identified  
• resource requirements for policy development and marketing are identified and secured |
| 3. Advocate for appropriate policy development | • strategies consistent with the role and principles of the agency are determined and promoted within the organisation and externally as appropriate  
• advocacy strategies and reporting mechanisms are selected and used to target key decision makers and others with influence in the identified policy area  
• the perspectives and position of the organisation are reflected in the advocacy strategies and reporting mechanisms selected |

### Range of Variables

*The contexts for managing policy development include:*

- policy development functions  
- policy developments as part of overall management responsibility  
- government, non-government and community based agencies

*Managing policy development will be carried out within requirements established by:*

- organisation mission, objectives, outcomes and philosophies  
- government and political directions  
- community driven changes, perceived needs  
- state and commonwealth legislation  
- client needs
Evidence Guide

Critical aspects of assessment:
- Identifying future directions in organisational services including:
  - awareness of the range of social, economic, political movements and direction with government, non-government and community contexts
  - analysis of trends
  - impact on the organisation
- managing policy development including:
  - developing and facilitating appropriate consultations
  - evaluating existing policy
  - identifying gaps
  - processes to facilitate development

Underpinning knowledge:
- relevant legislation, government discussion papers
- relevant major conferences, seminars papers
- policy development models/systems
- consultation models
- organisational strategic plans

Underpinning skills:
- environmental scanning
- strategic thinking/decision making
- advocacy
- high level of written/oral
- networking
- resource management
- analysis
- marketing

Resource implications:
- access to appropriate workplace where assessment can be conducted or
- simulation of realistic workplace setting for assessment

Consistency in performance:
- assessment may include observations, questioning and evidence gathered from the workplace
- it is recommended that assessment may take place on one occasion but must include assessment of all aspects of managing policy development

Context of assessment:
- this unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
BSZ401A Plan assessment

This unit covers the requirements for planning an assessment in a specific context. The unit details the requirements for determining evidence requirements, selecting appropriate assessment methods and developing an assessment tool in a specific context.

This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
</table>
| 1. Establish evidence required for a specific context | • the evidence required to infer competency from the industry/enterprise competency standards, or other standards of performance, is established for a specified context  
• relevant unit(s) of competency is read and interpreted accurately to identify the evidence required  
• specified evidence requirements:  
• assure valid and reliable inferences of competency, authenticate the performance of the person being assessed and confirm that competency is current  
• sufficient evidence is specified to show consistent achievement of the specified standards  
• the cost of gathering the required evidence is established |
| 2. Establish suitable assessment method(s) | • assessment methods are selected which are appropriate for gathering the type and amount of evidence required  
• opportunities to consolidate evidence gathering activities are identified  
• allowable adjustments in the assessment method are proposed to cater for the characteristics of the person(s) being assessed |
| 3. Develop assessment tools appropriate to a specific assessment context | • an assessment tool is developed to gather valid, reliable and sufficient evidence for a specific assessment context  
• the assessment tool is designed to mirror the language used to demonstrate the competency in a specific context  
• clear instructions (spoken or written) are prepared including any adjustments which may be made to address the characteristics of the person(s) being assessed  
• the assessment tool is checked to ensure flexible, fair, safe and cost-effective assessment to occur |
| 4. Trial assessment procedure | • assessment methods and tools are trialed with an appropriate sample of people to be assessed  
• evaluation of the methods and tools used in the trial provides evidence of clarity, reliability, validity, fairness, cost effectiveness and ease of administration  
• appropriate adjustments are made to improve the assessment method and tools in light of the trial  
• assessment procedures, including evidence requirements, assessment methods and tools, are ratified with appropriate personnel in the industry/enterprise and/or training organisation where applicable |
Range of Variables

Assessment system may be developed by:
- the industry through the endorsed component of training packages assessment guidelines
- the enterprise
- a registered training organisation
- a combination of the above

The assessment system should specify the following:
- the purpose of assessment
- competencies required of assessors
- record keeping procedures and policies
- any allowable adjustments to the assessment method which may be made
- the appeal/review mechanisms and procedures
- the review and evaluation of the assessment process
- the linkages between assessment and training qualifications/awards
- employee classification
- remuneration
- progression
- relevant policies
- quality assurance mechanisms
- apportionment of costs/fees (if applicable)
- marketing/promotion of assessment
- verification arrangements
- auspicing arrangements, if applicable
- partnership arrangements, if applicable

Specific assessment context may be determined by:
- purpose of the assessment such as
  ◊ to gain a particular qualification or a licence
  ◊ to determine employee classification
  ◊ to recognise prior learning/current competencies
  ◊ to identify training needs or progress.
- location of the assessment such as:
  ◊ on the job or off the job
  ◊ combination of both.
- assessment guidelines of training package or other assessment requirements

Characteristics of persons being assessed may include:
- language, literacy and numeracy needs
- cultural, language and educational background
- gender
- physical ability
- level of confidence, nervousness or anxiety
- age
- experience in training and assessment
- previous experience with the topic

Appropriate personnel may include:
- assessors
- person(s) being assessed
- employee/union representatives
- consultative committees
- users of assessment information such as training providers, employers, human resource departments
• state/territory training/recognition authorities
• training and assessment coordinators
• relevant managers/supervisors team leaders
• technical specialists

**Appropriate procedure:**

• the assessment procedure is developed (and endorsed) by person(s) responsible for the implementation of the assessment process in:
  ◊ the industry
  ◊ the enterprise
  ◊ the training organisation
  ◊ a combination of the above
• the assessment procedure should specify the following:
  ◊ recording procedure
  ◊ appeal/review mechanism
  ◊ assessment methods to be used
  ◊ instructions/materials to be provided to the person(s) being assessed
  ◊ criteria for making decisions of competent, or not yet competent
  ◊ number of assessors
  ◊ assessment tools
  ◊ evidence required
  ◊ location of assessment
  ◊ timing of assessment
  ◊ assessment group size
  ◊ allowable adjustments to the assessment procedure depending on the characteristics of the person being assessed

**Assessment methods may include:**

• direct observation of performance, products, practical tasks, projects and simulation exercises
• review of log books/or and portfolios of evidence
• consideration of third party reports and authenticated prior achievements
• written, oral or computer managed questioning
• these methods may be used in combination in order to provide sufficient evidence to make a judgement

**Assessment tools may include:**

• specific instructions to be given relating to the performance of practical tasks or processes or simulation exercises
• specific instructions to be given in relation to the production of projects and exercises
• sets of verbal/written/computer based questions to be asked
• performance checklists
• log books
• descriptions of competent performance

A number of these tools may be used in combination in order to provide enough evidence to make judgments

**Assessment environment and resources to be considered include:**

• time
• location
• personnel
• finances/costs
• equipment
• materials
• occupational health and safety requirements
• enterprise/industry standard operating procedures
Allowable adjustments may include:
- provision of personal support services (e.g., Auslan interpreter, reader, interpreter, attendant carer, scribe)
- use of adaptive technology or special equipment (e.g., word processor or lifting gear)
- design of shorter assessment sessions to allow for fatigue or medication
- use of large print version of any papers

Evidence Guide:

Critical aspects of evidence:
- documentation in relation to:
  - specific assessment context, including the purpose of assessment
  - features of the assessment system
  - characteristics of the person being assessed
  - evidence of competency required
  - plan of opportunities for gathering the evidence required
  - assessment methods selected including any allowable adjustments to meet characteristics of person(s) being assessed
- an assessment tool(s) for the specific assessment context which ensures valid, reliable, flexible and fair assessment including any allowable adjustments
- an assessment procedure for the specific context

Assessment requires evidence of the following processes to be provided:
- how the context of assessment was specified
- how the characteristics of the person(s) being assessed were identified
- why a particular assessment method was selected
- how the assessment was planned to ensure that language, literacy and numeracy issues were taken into consideration
- how evidence was evaluated in terms of validity, authenticity, sufficiency, currency and consistent achievement of the specified standard
- how the assessment tool was developed for the specified context
- how the assessment tool was validated and ratified by appropriate personnel

Interdependent assessment of units:
- this unit of competency may be assessed in conjunction with other units that form part of a job role

Required knowledge and skills:
- knowledge of standards of performance including industry or enterprise competency standards and assessment guidelines
- knowledge of legal and ethical responsibilities including occupational health and safety regulations and procedures, equal employment and anti-discrimination requirements relevant to the specified context
- understanding of the assessment principles of reliability, validity, fairness, flexibility, authenticity, sufficiency and consistency
- knowledge of the assessment guidelines of the training package assessment and workplace training
- skills in the application of various assessment methods, relevant to workplace context
- planning of own work including predicting consequences and identifying improvements
- language, literacy and numeracy skills required to:
  - read and interpret relevant information to plan assessment
  - give clear and precise information/instructions in spoken or written form
  - adjust spoken and written language to suit target audience
  - write assessment tools using language which mirrors the language used to demonstrate the competency in the specific context
◊ prepare required documentation using clear and comprehensible language and layout
◊ calculate and estimate costs

- communication skills appropriate to the culture of the workplace and the individual(s)

**Resource implications:**
- access to relevant competencies, sources of information on assessment methods, assessment tools and assessment procedures
- access to person(s) wishing to be assessed, any relevant workplace equipment, information and appropriate personnel

**Consistency in performance:**
- competency in this unit needs to be assessed over a period of time, in a range of contexts and on multiple occasions, involving a combination of direct, indirect and supplementary forms of evidence

**Context for assessment:**
- assessment should occur on the job or in a simulated workplace. The candidate assessor should use competencies relevant to their area of technical expertise

<table>
<thead>
<tr>
<th>KEY COMPETENCIES</th>
<th>Collect, Analyse &amp; Organise Information</th>
<th>Communicate Ideas &amp; Information</th>
<th>Plan &amp; Organise Activities</th>
<th>Work with Others &amp; in Teams</th>
<th>Use Mathematical Ideas &amp; Techniques</th>
<th>Solve Problems</th>
<th>Use Technology</th>
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BSZ402A Conduct assessment

This unit covers the requirements for conducting an assessment in accordance with an assessment procedure in a specific context.

This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Identify and explain the context of assessment | • the context and purpose of assessment are discussed and confirmed with the person(s) being assessed  
• the relevant performance standards to be used in the assessment eg. current endorsed competency standards for the specific industry are clearly explained to the person being assessed  
• the assessment procedure is clarified and expectations of assessor and candidate are agreed  
• any legal and ethical responsibilities associated with the assessment are explained to the person(s) being assessed  
• the needs of the person being assessed are determined to establish any allowable adjustments in the assessment procedure  
• information is conveyed using language and interactive strategies and techniques to communicate effectively with the person(s) being assessed |
| 2. Plan evidence gathering opportunities | • opportunities to gather evidence of competency, which occurs as part of workplace or training activities, are identified covering the dimensions of competency  
• the need to gather additional evidence which may not occur as part of the workplace or training activities are identified  
• evidence gathering activities are planned to provide sufficient, reliable, valid and fair evidence of competency in accordance with the assessment procedure |
| 3. Organise assessment | • the resources specified in the assessment procedure are obtained and arranged within a safe and accessible assessment environment  
• appropriate personnel are informed of the assessment  
• spoken interactions and any written documents employ language and strategies and techniques to ensure the assessment arrangements are understood by all person(s) being assessed and appropriate personnel |
| 4. Gather evidence | • verbal and non-verbal language is adjusted and strategies are employed to promote a supportive assessment environment to gather evidence  
• the evidence specified in the assessment procedure is gathered, using the assessment methods and tools  
• evidence is gathered in accordance with specified allowable adjustments where applicable  
• the evidence gathered is documented in accordance with the assessment procedure |
5. Make the assessment decision

- the evidence is evaluated in terms of:
  ◊ validity
  ◊ authenticity
  ◊ sufficiency
  ◊ currency
  ◊ consistent achievement of the specified standard
- the evidence is evaluated according to the dimensions of competency:
  ◊ task skills
  ◊ task management skills
  ◊ contingency management skills
  ◊ job/role environment skill
  ◊ transfer and application of knowledge and skills to new contexts
- guidance is sought, when in doubt, from a more experienced assessor(s)
- the assessment decision is made in accordance with the criteria specified in the assessment procedure

6. Record assessment results

- assessment results are recorded accurately in accordance with the specified record keeping requirements
- confidentiality of assessment outcome is maintained and access to the assessment records is provided only to authorised personnel

7. Provide feedback to persons being assessed

- clear and constructive feedback in relation to performance is given to the person(s) being assessed using language and strategies to suit the person(s) including guidance on further goals/training opportunities is provided to the person(s) being assessed
- opportunities for overcoming any gaps in competency, as revealed by the assessment, are explored with the person(s) being assessed
- the person(s) being assessed is advised of available reassessment opportunities and/or review appeal mechanisms where the assessment decision is challenged

8. Report on the conduct of the assessment

- positive and negative features experienced in conducting the assessment are reported to those responsible for the assessment procedure
- any assessment decision disputed by the person(s) being assessed is recorded and reported promptly to those responsible for the assessment procedure
- suggestions for improving any aspect of the assessment process are made to appropriate personnel

Range of Variables

Assessment system may be developed by:
- the industry
- the enterprise
- a Registered Training Organisation
- a combination of the above
The assessment system should specify the following:

- the purpose of assessment
- competencies required of assessors
- record keeping procedures and policies
- any allowable adjustments to the assessment method which may be made
- the appeal/review mechanisms and procedures
- the review and evaluation of the assessment process
- the linkages between assessment and training qualifications/awards, employee classification, remuneration, progression
- relevant policies
- quality assurance mechanisms
- apportionment of costs/fees (if applicable)
- marketing/promotion of assessment
- verification arrangements
- auspicing arrangements, if applicable
- partnership arrangements, if applicable

Specific assessment context may be determined by:

- purpose of the assessment, such as
  - to gain a particular qualification or a licence
  - to determine employee classification
  - to identify training needs or progress
  - to recognise prior learning/current competencies
- location of the assessment, such as
  - on the job or off the job
  - combination of both
- assessment Guidelines of the relevant training package or other assessment requirements
- features of assessment system

Characteristics of persons being assessed may include:

- language, literacy and numeracy needs
- cultural, language and educational background
- gender
- physical ability
- level of confidence, nervousness or anxiety
- age
- experience in training and assessment
- previous experience with the topic

Appropriate personnel may include:

- assessors
- person(s) being assessed
- employee/union representatives
- consultative committees
- users of assessment information such as training providers, employers, human resource departments
- State/Territory Training/Recognition Authorities
- training and assessment coordinators
- relevant managers/supervisors/team leaders
- technical specialists

Assessment procedure may include:

- the assessment procedure is developed (and endorsed) by person(s) responsible for the implementation of the assessment process in:
  - the industry
  - the enterprise
  - the training organisation
  - a combination of the above
the assessment procedure should specify the following:

- recording procedure
- appeal/review mechanism
- assessment methods to be used
- instructions/materials to be provided to the person(s) being assessed
- criteria for making decisions of competent, or not yet competent
- number of assessors
- assessment tools
- evidence required
- location of assessment
- timing of assessment
- assessment group size
- allowable adjustments to the assessment procedure depending on the characteristics of the person(s) being assessed

Assessment methods may include:

- work samples and/or simulations
- direct observation of performance, products, practical tasks, projects and simulation exercises
- review of log books and portfolios
- questioning
- consideration of third party reports and authenticated prior achievements
- written, oral or computer managed questioning

These methods may be used in combination in order to provide sufficient evidence to make a judgement.

Assessment tools may include:

- specific instructions to be given relating to the performance of practical tasks or processes or simulation exercises
- specific instructions to be given in relation to projects and exercises
- sets of oral/written/computer based questions to be asked
- performance checklists
- log books
- marking guides
- descriptions of competent performance

A number of these tools may be used in combination in order to provide enough evidence to make judgments.

Allowable adjustments may include:

- provision of personal support services eg. Auslan interpreter, reader, interpreter, attendant carer, scribe
- use of adaptive technology or special equipment (eg work processor or lifting gear)
- design of shorter assessment sessions to allow for fatigue or medication
- use of large print version of any papers

Assessment environment and resources to be considered may include:

- time
- location
- personnel
- finances/costs
- equipment
- materials
- occupational health and safety requirements
- enterprise/industry standard operating procedures
Recording procedures may include:
• forms designed for the specific assessment result (paper or electronic)
• checklists for recording observations/process used (paper or electronic)
• combination of the above

Assessment reporting:
• final assessments will record the unit(s) of competency in terms of code, title and endorsement date
• summative assessment reports, where issued, will indicate units of competency where additional learning is required

NB: Statutory and legislative requirements for maintaining records may vary in States/Territories.

Evidence Guide

Critical aspects of evidence:
• description of the assessment context, including the purpose of assessment,
• the relevant competency or other performance standard and assessment procedure used
• description of how evidence gathered is valid, authentic, sufficient, fair and reliable to ensure competency
• conduct of assessment in accordance with competency requirements
• recording of the assessment results in accordance with the specified assessment procedure and record keeping requirements
• report on the conduct of the assessment, including positive and negative features and suggestions for improving any aspect of the assessment process

Assessment requires evidence of the following processes to be provided:
• how agreement was sought with the person(s) being assessed on the conduct of the assessment
• how opportunities to gather evidence were identified as part of workplace or training activities
• how evidence was gathered in accordance with the assessment procedure
• how evidence gathering activity covered the dimensions of competency
• how resources were arranged according to the assessment procedure
• how appropriate personnel were consulted
• how evidence was gathered in accordance with allowable adjustments to the assessment method where applicable
• how evidence was evaluated in terms of validity, authenticity, sufficiency, currency and consistent achievement of the specified standard
• how the assessment was conducted to ensure that:
  ◊ all arrangements and activities were understood by all parties
  ◊ the person was put at ease and the supportive assessment environment was created
  ◊ language, literacy and numeracy issues were taken into consideration
• how constructive feedback was provided to the person(s) being assessed including instances of not yet competent
• how guidance was provided to person(s) being assessed on how to overcome gaps in competency revealed

Interdependent assessment of units:
• this unit of competency may be assessed in conjunction with other units that form part of a job role

Required skills and knowledge:
• knowledge of workplace application of relevant standards of performance including industry or enterprise competency standards and assessment guidelines
• knowledge of legal and ethical responsibilities including occupational health and safety regulations and procedures, equal employment and anti-discrimination requirements relevant to the specified context
• understanding of policies and procedures of the workplace and/or job role together with any related legislation or regulatory requirements
• understanding of the assessment principles of reliability, validity, fairness, flexibility, authenticity, sufficiency and consistency
• assessment guidelines of the training package assessment and workplace training
• planning of own work including predicting consequences and identifying improvements
• skills in the application of various assessment methods/tools, relevant to workplace context
• language, literacy and numeracy skills required to:
  ◊ give clear and precise instructions and information in spoken or written form
  ◊ seek confirmation of understanding from the person(s) being assessed
  ◊ adjust language to suit target audience
  ◊ prepare required documentation using clear and comprehensible language and layout
  ◊ ask probing questions and listen strategically to understand responses of the person being assessed
  ◊ seek additional information for clarification purposes
  ◊ use verbal and non-verbal language to promote a supportive assessment environment
  ◊ use language of negotiation and conflict resolution to minimise conflict
• communication skills appropriate to the culture of the workplace and the individual(s)

Resource implications:
• access to relevant competencies, sources of information on assessment methods, assessment tools and assessment procedures
• access to person(s) wishing to be assessed, relevant workplace equipment, information and appropriate personnel

Consistency of performance:
• competency in this unit needs to be assessed over a period of time, in a range of contexts and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence

Assessment context:
• assessment should occur on the job or in a simulated workplace. The candidate assessor should use competencies relevant to their technical expertise

<table>
<thead>
<tr>
<th>KEY COMPETENCIES</th>
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<tr>
<td>Communicate Ideas &amp; Information</td>
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BSZ403A Review assessment

This unit covers requirements to review assessment procedures in a specific context.
This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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</table>
| 1. Review the assessment procedure(s) | • appropriate personnel are given the opportunity to review the assessment outcomes and procedure using agreed evaluation criteria  
• the review process established by the enterprise, industry or registered training organisation is followed  
• the assessment procedure(s) is reviewed at a specified site in cooperation with person(s) being assessed, and any appropriate personnel in the industry/enterprise/training establishment and/or any agency identified under legislation  
• review activities are documented, findings are substantiated and the review approach evaluated |
| 2. Check consistency of assessment decision | • evidence from a range of assessments is checked for consistency across the dimensions of competency  
• evidence is checked against the key competencies  
• consistency of assessment decisions with defined performance standards are reviewed and discrepancies and inconsistencies are noted and acted upon |
| 3. Report review findings | • recommendations are made to appropriate personnel for modifications to the assessment procedure(s) in light of the review outcomes  
• records are evaluated to determine whether the needs of appropriate personnel have been met  
• effective contributions are made to system-wide reviews of the assessment process and feedback procedures and are reviewed |

Range of Variables

*Assessment system may be developed by:*  
• the industry  
• the enterprise  
• the registered training organisation  
• a combination of the above  
• the assessment system should specify the following:  
  ◊ the purpose of assessment  
  ◊ competencies required of assessors  
  ◊ record keeping procedures and policies  
  ◊ any allowable adjustments to the assessment method which may be made for the person being assessed who have special needs  
  ◊ the appeal/review mechanisms and procedures  
  ◊ the review and evaluation of the assessment process  
  ◊ the linkages between assessment and training qualifications/awards, employee classification, remuneration, progression  
  ◊ relevant policies  
  ◊ quality assurance mechanisms  
  ◊ apportionment of costs/fees (if applicable)  
  ◊ marketing/promotion of assessment  
  ◊ verification arrangements  
  ◊ auspicing arrangements, if applicable
partnership arrangements, if applicable

**Specific assessment context may be determined by:**

- purpose of the assessment such as:
  - to gain a particular qualification or a licence
  - to determine employee classification
  - to identify training needs or progress
  - to recognise prior learning/current competencies
- location of the assessment such as:
  - on the job or off the job
  - combination of both
- assessment guidelines of training package or other assessment requirements
- features of assessment system

**Evaluation criteria in review process should include:**

- number of persons being assessed
- duration of the assessment procedure
- organisational constraints within which assessors must operate
- occupational health and safety factors
- relationship of the assessor to other appropriate personnel in the assessment process
- frequency of assessment procedure
- budgetary restraints
- information needs of government and other regulatory bodies
- support needs and professional development needs of assessors
- characteristics of persons being assessed
- human resource management implications
- consistency of assessment decisions
- levels of flexibility in the assessment procedure
- fairness of the assessment procedure
- efficiency and effectiveness of the assessment procedure
- competencies achieved by the person(s) being assessed
- difficulties encountered during the planning and conduct of the assessment
- motivation of the person(s) being assessed
- location and resource suitability
- reliability, validity, fairness and flexibility of the assessment tool(s)
- relevance of assessment to specified context
- grievances/challenges to the assessment decision by the person(s) being assessed or their supervisor/manager/employer
- ease of administration
- access and equity considerations
- practicability

**Characteristics of persons being assessed may include:**

- language, literacy and numeracy needs
- cultural and language background
- educational background or general knowledge
- gender
- age
- physical ability
- previous experience with the topic
- experience in training and assessment
- level of confidence, nervousness or anxiety
- work organisation or roster

**Appropriate personnel may include:**

- assessors
- person(s) being assessed
- employee/union representatives
- consultative committees
• users of assessment information such as training providers, employers, human resource departments
• state/territory training/recognition authorities
• training and assessment coordinators
• relevant managers/supervisor/team leaders
• technical specialists

Assessment procedure:
• The assessment procedure is developed (and endorsed) by person(s) responsible for the implementation of the assessment process in:
  ◊ the industry
  ◊ the enterprise
  ◊ the training organisation
  ◊ a combination of the above

The assessment procedure should specify the following:
• recording procedure
• appeal/review mechanism
• assessment methods to be used
• instructions/materials to be provided to the person(s) being assessed
• criteria for making decisions of competent, or not yet competent
• number of assessors
• assessment tools
• evidence required
• location of assessment
• timing of assessment
• assessment group size
• allowable adjustments to the assessment procedure depending on characteristics of person(s) being assessed

Assessment methods may include a combination of:
• work samples and or simulations
• direct observation of performance, products, practical tasks, projects and simulation exercises
• review of log books and portfolios
• questioning
• consideration of third party reports and authenticated prior achievements
• written, oral or computer managed questioning

These methods may be used in combination in order to provide sufficient evidence to make a judgement.

Assessment tools may include:
• specific instructions to be given relating to the performance of practical tasks or processes or simulation exercises
• specific instructions to be given in relation to the production projects and exercises
• sets of oral/written/computer based questions to be asked
• performance checklists
• log books
• marking guides
• descriptions of competent performance

A number of these tools may be used in combination in order to provide enough evidence to make judgments.

Allowable adjustments may include:
• provision of personal support services eg. Auslan interpreter, reader, interpreter, attendant carer, scribe
• use of adaptive technology or special equipment eg. work processor or lifting gear
• design of shorter assessment sessions to allow for fatigue or medication
• use of large print version of any papers

Assessment environment and resources to be considered:
• time
• location
• personnel
• finances/costs
• equipment
• materials
• occupational health and safety requirements
• enterprise/industry standard operating procedures

Evidence Guide

Critical aspects of evidence:
• documented process for the review of the assessment procedure(s)
• a report on the review of the operations and outcomes of the assessment procedure(s) including substantiation of findings and any recommendations for modifications

Assessment requires evidence of the following processes to be provided:
• how the review process for evaluating the assessments in the enterprise, industry or organisation was implemented
• why particular review/evaluation methodologies were chosen
• how cooperation and input from the person(s) assessed and appropriate personnel was sought as part of the review

Interdependent assessment of units:
• this unit of competency may be assessed in conjunction with other units that form part of a job role

Required knowledge and skills:
• knowledge of the review process established by the industry, enterprise or training organisation
• knowledge of evaluation methodologies relevant to the assessment context
• relevant standards of performance including industry or enterprise competency standards and assessment guidelines
• knowledge of legal and ethical responsibilities including occupational health and safety regulations and procedures, equal employment and anti-discrimination requirements
• knowledge of relevant organisational policies and procedures of the workplace and/or job role
• understanding of the assessment principles of reliability, validity, fairness, flexibility, authenticity, sufficiency and consistency
• skills in the application of various assessment methods/tools in a relevant workplace context
• planning own work including predicting consequences and identifying improvements
• language, literacy and numeracy skills required to:
  • read and interpret review procedures
  • participate in discussions and listen strategically to evaluate information critically
  • gather, select and organise findings from a number of sources
  • document findings in summary form, graphs or tables
  • present findings in a short report to relevant personnel
  • make recommendations based on findings
  • determine cost effectiveness
  • communication skills appropriate to the culture of the workplace and the individual(s)

Resource implications:
• access to relevant competencies, sources of information on assessment methods, assessment tools, assessment procedures and assessment review mechanisms
• access to assessment decisions, relevant workplace equipment, appropriate personnel
Consistency in performance:
• competency in this unit needs to be assessed over a period of time, in a range of contexts and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence

Context for assessment:
• assessment may occur on the job or in a simulated workplace. The candidate assessor should use competencies relevant to their technical expertise

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<thead>
<tr>
<th>KEY COMPETENCIES</th>
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BSZ404A Train small groups

This unit covers the requirements for planning, delivering and reviewing training provided for the purposes of developing competency on a one-to-one or small group basis.

This unit was taken from the Training Package for Assessment and Workplace Training.

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<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
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</table>
| 1. Prepare for training | • specific needs for training are identified and confirmed through consultation with appropriate personnel  
• training objectives are matched to identified competency development needs  
• training approaches are planned and documented |
| 2. Deliver training | • training is conducted in a safe and accessible environment  
• training delivery methods are selected appropriate to training participant(s) needs, trainer availability, location and resources  
• strategies and techniques are employed which facilitate the learning process  
• objectives of the training, sequence of activities and assessment processes are discussed with training participant(s)  
• a systematic approach is taken to training and the approach is revised and modified to meet specific needs of training participant(s) |
| 3. Provide opportunities for practices | • practice opportunities are provided to ensure that the participant achieves the components of competency  
• various methods for encouraging learning are implemented to provide diverse approaches to meet the individual needs of participants |
| 4. Review training | • participants are encouraged to self evaluate performance and identify areas for improvement  
• participants readiness for assessment is monitored and assistance provided in the collection of evidence of satisfactory performance  
• training is evaluated in the context of self-assessment, participant feedback, supervisor comments and measurements against objectives  
• training details are recorded according to enterprise and legislative requirements  
• results of evaluation are used to guide further training |

Range of Variables

*Relevant information to identify training needs includes*:  
• industry/enterprise or other performance competency standards  
• endorsed components of relevant industry training package  
• industry/workplace training practices  
• job descriptions  
• results of training needs analyses  
• business plans of the organisation which identify skill development requirements  
• standard operating and/or other workplace procedures
Appropriate personnel may include:
- team leaders/supervisors/technical experts
- managers/employers
- training and assessment coordinators
- training participants
- representative government regulatory bodies
- union/employee representatives
- consultative committees
- assessors

Training delivery methods and opportunities for practice may include:
- presentations
- demonstrations
- explanations
- problem solving
- mentoring
- experiential learning
- group work
- on the job coaching
- job rotation
- a combination of the above

Components of competency include:
- task skills
- task management skills
- contingency management skills
- job/role environment skills
- transfer and application of skills and knowledge of new contents

Characteristics of training participant may include information in relation to:
- language, literacy and numeracy needs
- cultural, language, and educational background
- gender
- physical ability
- level of confidence, nervousness or anxiety
- age
- previous experience with the topic
- experience in training and assessment

Training sessions may include:
- one to one demonstration
- small group demonstration (2 to 5 persons)

Resources may include:
- time
- location
- personnel
- materials and equipment
- occupational health and safety and other workplace requirements
- enterprise/industry standard operating procedures
- finances/costs

Strategies and techniques may include:
- active listening
- targeted questioning
- points of clarification
- group discussions
Evidence Guide

Critical aspects of evidence:

- description of the specific training need and required competency outcomes
- outline of the training approach and steps to be followed
- description of training participant(s) and delivery method(s) to be used
- specific resources required
- outline of the evidence to be collected for monitoring training participant progress
- trainers self assessment of training delivery
- participant evaluation of training delivery
- evaluation of review comments against plan of training
- records/documentation for monitoring progress of training participant(s)

Evidence may be collected using proformas or template

Assessment requires evidence of the following processes to be provided:

- how the specific training need was determined
- how the sequence of the training was determined
- how appropriate personnel were identified
- why particular delivery method(s) were selected
- how the characteristics of training participant(s) as identified
- how the resource requirements were established
- how participant progress was monitored
- why and how the training resources were selected
- how appropriate personnel confirmed training arrangements
- how participant(s) were informed of:
  - intended training outcomes
  - competencies to be achieved
  - on and/or off the job practice opportunities
  - benefits of practices
  - learning activities and tasks
  - assessment tasks and requirements
- how constructive feedback was provided to training participant about progress toward competency to be acquired
- how training participant readiness for assessment was determined and confirmed
- how records were maintained to ensure confidentiality, accuracy and security

Evidence may be provided verbally or in written form

Interdependent assessment of units:

- this unit may be assessed in conjunction with other units that form part of a job function

Required knowledge and skills:

- competency in the units being taught
- workplace application of the relevant competencies
- identification of evidence of competency
- planning of own work including predicting consequences and identifying improvements
- application of relevant workplace policies (e.g., occupational health and safety and equal employment opportunity) and any relevant legislative or regulatory requirements
- correct use of equipment, and any other processes and procedures appropriate for the training
- ethical handling of performance issues
- language, literacy and numeracy required skills to:
  - conduct discussions and ask probing questions to review the training
  - gather information (in spoken or written form) for review purposes
  - make verbal recommendations for delivery of future training
  - adjust language to suit target audience (training participant/appropriate personnel)
  - complete records on training
  - provide verbal feedback & report on training outcomes
◊ follow and model examples of written texts
◊ promote training in verbal or written form

- communication skills appropriate to the culture of the workplace, appropriate personnel and training participants

**Resource implications:**
- access to records system for training, information, and training participants and supervisory staff (where appropriate)

**Consistency in performance:**
- competency in this unit needs to be assessed over a period of time, in a range of contexts and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence

**Context for assessment:**
- assessment may occur on the job or in a simulated workplace. Candidate workplace trainers should use competencies relevant to their area of technical expertise

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<th>Key Competencies</th>
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BSZ405A Plan and promote a training program

This unit covers the requirement for persons to plan a training program. This involves the identification of competencies to meet the needs of a target group and the planning and promotion of appropriate training strategies.

This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
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<tbody>
<tr>
<td>1. Identify the competency needs</td>
<td>• the client, target group and appropriate personnel are identified and required goals and outcomes of the training program are negotiated and confirmed with the client</td>
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<td>• relevant competency or other performance standards for the target group are obtained and verified with appropriate personnel</td>
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<td>• gaps between the required competencies and current competencies of the target group are determined</td>
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<td>• current competencies and any relevant characteristics of each participant in the target group are identified using appropriate investigation methods</td>
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<td>2. Document training program requirements</td>
<td>• training program goals are identified to specify required knowledge and skill and links to specified units of competency qualification and/or other standards of performance</td>
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<td>• training program documentation specifies the range of workplace applications, activities and tasks that must be undertaken to develop the requisite competencies</td>
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<td>• available training programs and resources are customised to meet specific client needs, where required</td>
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<td>• appropriate grouping of activities is identified to support formative and summative assessments</td>
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<td>• overview of training sessions including appropriate timing and costs is prepared and confirmed with appropriate personnel including those relating to language, literacy and numeracy and specified in documentation</td>
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<td>• methods of supporting and guiding participants within the target group are identified and specified</td>
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<td>3. Identify program resources</td>
<td>• resources required for the program are identified and approved by appropriate personnel and allocated to meet training participants' characteristics are allocated</td>
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<td>• safe and accessible training environment are identified and arranged to support the development of competencies</td>
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<td>• arrangements are made with personnel required to support the training program</td>
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<td>• a register of training resources is maintained and held in an accessible form</td>
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<td>4. Promote training</td>
<td>• advice on the development of the training program is provided to appropriate personnel</td>
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<td>• information on planned training events is made widely available, utilising a variety of methods</td>
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<td>• promotional activities are monitored for effectiveness in collaboration with the client and appropriate personnel</td>
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</table>
Range of Variables

Training program:
- a collection of training activities to develop a target group. Clients provide the approvals for expenditure of training resources. Target group may include:
  - employee groups eg. particular classification or work area, female employees
  - groups or individuals with special training and/or recognition needs

Training may be:
- on the job
- in a simulated setting
- in a training organisation
- in a combination of locations to suit the units of competency being learned and/or assessed
- in a single site or multi-site operation

Clients may include:
- a department/division
- a work area
- an enterprise or organisation

Clients needs may include:
- increased productivity
- increased enterprise profitability
- attainment of specified industry or enterprise competencies
- achievement of community priorities
- achievement of government priorities

Information on the required competencies may be collected from:
- industry/enterprise competency standards
- licensing requirements
- standard operating procedures
- job descriptions
- discussions with client group
- enterprise skills audit reports
- industry skills audit reports
- benchmarking reports
- industry publications or reports
- government reports
- market needs analysis reports

Training program may be based on:
- national industry training packages
- enterprise training packages
- agreed curriculum
- international standards

Target group competencies may be identified by:
- matching enterprise/client needs to available national industry training packages
- reports on assessment of competencies
- enterprise training and assessment record keeping system
- self, peer or supervisor reports

Appropriate personnel may include:
- team leaders/supervisors/managers/employers
- participant/employee/learner
- technical and subject experts including, language, literacy, numeracy specialists
- government regulatory bodies
- union/employee representatives
- consultative committees
- users of training information such as training providers, employers, human resource departments State/Territory Training/Recognition Authorities
• assessment/training partners
• trainers/teachers and assessors

Training program delivery may involve:
• enterprise workplace based delivery
• training provider based delivery
• community based delivery
• school based delivery
• international programs
• combination of the above

Characteristics of participants may include:
• language, literacy and numeracy needs
• cultural language and education background
• educational background or general knowledge
• gender
• age
• physical ability
• previous experience with the topic
• experience in training and assessment
• level of confidence, nervousness or anxiety

Variables for achieving competency may include:
• characteristics of training participants
• resources time, location, space, people and costs
• language, literacy and numeracy issues

Training delivery methods may include:
• face to face
• distance learning
• lock step, partly self paced, all self paced
• trainer centred, participant centred
• real time, time independent
• place dependent, place independent
• interactive eg. audio, or video conferencing, computer assisted, discussion
• mentoring
• active learning
• coaching

Training support may include:
• technical experts (including particular subject and language and literacy specialists)
• equipment
• team leaders/supervisors/managers/employers
• enterprises
• assessment/training partners
• trainers/teachers and assessors
• training and assessment coordinators

Training materials may include:
• non-endorsed components of a training package
• work books
• workshop guides
• background reading materials/documents
• handouts
• industry/enterprise competency standards
• supportive policies and legislation
• specific language, literacy and numeracy support material
Evidence Guide

Critical aspects of evidence:
Assessment requires evidence of the following products to be collected:
• description of client, target group and appropriate personnel
• analysis of training needs of target group
• documentation on consultations with appropriate personnel throughout the program development phase
• outline of training program goals and supporting documentation including variables which may impact on the achievement of program goals
• documentation on training resources and any other requirements for the training program

Assessment requires evidence of the following processes to be provided:
• how client, target group and appropriate personnel were identified
• how required competencies were determined to meet the client needs
• why there is a need for training as opposed to other non-training alternatives
• how the need for training was verified with appropriate personnel
• how appropriate personnel approved training program resources
• how language, literacy and numeracy issues were taken into consideration in the planning process

Interdependent assessment of units:
• this unit of competency may be assessed in conjunction with other units that form part of a job role

Required knowledge and skills:
• understanding assessment and workplace training competency standards and assessment guidelines
• relevant competency standards, including industry or enterprise standards of performance
• relationships of competencies to industrial agreements, classification systems and Australian qualifications framework (AQF)
• relevant workplace policies and procedures that apply to that work and (any) related legislation or regulatory requirements eg. occupational health and safety and anti discrimination regulations
• competency in unit(s) of competency relevant to the training program
• understanding of the principles of adult learning and competency based training as applied to the target group and client
• identification and correct use of equipment, processes and procedures relevant to competencies
• knowledge of methods of training needs analysis and planning
• sources of assistance for participants requiring language or other particular training support
• planning own work including predicting consequences and identifying improvements
• language, literacy and numeracy skills required to:
  ◊ collect, summarise and interpret relevant information to plan a program
  ◊ communicate in spoken and written form with a range of people in the specified training context
  ◊ adjust spoken and written language to suit audience
  ◊ prepare and/or customise training materials and specified documentation using clear and comprehensible language and layout
  ◊ calculate and estimate costs, time and length of training programs
• awareness of language, literacy and numeracy issues relevant to the context of training and assessment, including current theories on the integration of ll&n with technical training
• communication skills appropriate to the culture of the workplace, appropriate personnel and target group

Resource implication:
• access to target group, potential opportunities to identify training needs of a target group, relevant competencies or other standards of performance and resources
Consistency in performance may include:
- competency in this unit needs to be assessed over a period of time and in a range of contexts, and on multiple occasions, involving a combination of direct, indirect and supplementary forms of evidence

Context for assessment:
- assessment may occur on the job or in a simulated workplace

<table>
<thead>
<tr>
<th>KEY COMPETENCIES</th>
<th>Collect, Analyse &amp; Organise Information</th>
<th>Communicate Ideas &amp; Information</th>
<th>Plan &amp; Organise Activities</th>
<th>Work with Others &amp; in Teams</th>
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</table>
BSZ406A Plan a series of training sessions

This unit covers the requirement for persons who implement a training program for a target group. This involves planning a series of training sessions to meet the identified competency requirements of the target group.

This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify training requirements</td>
<td>• current competencies of the target group are identified • relevant training package documentation or approved training course documentation is obtained where applicable • qualification requirements, competencies and/or other performance standards to be attained are interpreted • training requirements are identified from the gap between the required competencies and the current competencies of the target group • training requirements are confirmed with appropriate personnel</td>
</tr>
<tr>
<td>2. Develop outlines of training sessions</td>
<td>• the training program goals, outcomes, performance and underpinning knowledge requirements are identified • the training program requirements, workplace application, activities and tasks required to develop the requisite competencies are analysed • a range of training delivery methods are identified which are appropriate for: ◊ the competencies to be achieved ◊ training program goals ◊ characteristics of training participants ◊ language, literacy and numeracy skill level of training participants ◊ availability of equipment and resources ◊ industry/enterprise contexts and requirements • training session outlines are mapped against required competencies and deficiencies are identified and addressed • special requirements for resources, particular practice requirements and training experiences are documented • methods of supporting and guiding training participants including appropriate training resources, language literacy and numeracy support are specified</td>
</tr>
<tr>
<td>3. Develop training materials</td>
<td>• available materials to support the training program are checked for relevance and appropriateness in terms of the language, style, characteristics of training participants and copyright • existing materials are customised or resources are developed to enhance the learning capability of training participants to achieve in the delivery setting • instructions for use of learning materials and any required equipment are provided • copyright laws are observed • training resource costs are identified and approvals are obtained from appropriate personnel • documentation, resources and materials developed or used are clear and comprehensible</td>
</tr>
</tbody>
</table>
4. Develop training sessions

- training session plans are developed to meet the goals of the training program
- training session plans specify session planned outcomes
- opportunities are created within training session design for participants to manage own competency acquisition and apply the relevant competencies in practice
- session plans identify delivery methods which are appropriate for:
  ◊ the competency to be achieved
  ◊ training program's goals
  ◊ training participants' characteristics
  ◊ language, literacy and numeracy skill level of training participants
  ◊ learning resources and facilities to be used
  ◊ equipment and consumable resources available
  ◊ industry/enterprise/workplace contexts and requirements
  ◊ each outlined training session
- training sessions are designed to measure participant progress towards the program goals
- sequence and timing of the training sessions are documented

5. Arrange resources

- resources required for the training sessions are identified and, where special access is required, approved by appropriate personnel
- appropriate training locations are identified and arranged
- arrangements are made with (any) additional personnel required to support the training program
- the training environment arranged is safe, accessible and suitable for the acquisition of the identified competencies
- learning resources, documentation on required competencies, assessment procedures and information on available support for training participants is organised and held in an accessible form

Range of Variables

*Training program may include:*
- a collection of training activities to meet competency requirements and target group and client needs. Clients provide the approvals for expenditure of training resources. Target group is the group for whom training is available and may include:
  ◊ employee groups eg. particular classification or work area, female employees
  ◊ groups or individuals with special training and/or recognition needs

*Training may be conducted:*
- on the job
- in a simulated setting
- in a training organisation
- in a combination of locations to suit the units of competency being learned and/or assessed
- in a single site or multi site operation
- in a work environment

*Appropriate personnel may include:*
- trainers/teachers and assessors
- team leaders/supervisors/managers/employers
- participant/employee/learner
- technical/subject experts
- government regulatory bodies
• union/employee representatives
• consultative committees
• users of training information such as training providers, employers, human resource departments
• State/Territory Training/Recognition Authorities
• language, literacy, numeracy specialists
• assessment/training partners
• Training programs may be based on:
• national industry training packages
• enterprise training packages
• national, state and local curriculum
• enterprise based standards, standards of performance or curriculum
• international standards
• international programs

Target group competencies may be identified by:
• reports on assessment of competencies
• content analysis of curriculum vitae
• enterprise training and assessment record keeping system
• industry training and assessment recording system
• self, peer or supervisor reports

Training sessions may involve:
• theory
• demonstration
• combination of the two

Training programs may involve:
• enterprise based delivery
• provider based delivery
• fee for service
• local, state or national curricula
• community based delivery
• school based delivery
• international programs
• combination of the above

Characteristics of participants include:
• language, literacy and numeracy needs
• cultural and language background
• educational background or general knowledge
• gender
• age
• physical ability
• previous experience with the topic
• experience in training and assessment
• level of confidence, nervousness or anxiety
• work organisation or roster

Variables for achieving competency include:
• characteristics of training participants
• resources eg. time, location, space, people and costs
• language, literacy and numeracy issues
Training delivery methods include:
• face to face
• distance
• lock step, partly self paced, all self paced
• trainer centred, participant centred
• real time, time independent
• place dependent, place independent
• interactive eg. audio or video conferencing, computer assisted, discussion

Materials may include:
• non-endorsed components of an industry training package
• work books
• language, literacy and numeracy support/integrated training materials
• workshop guides
• background reading materials/documents
• handouts
• industry/enterprise competency standards
• supportive policies and legislation

Training support may include:
• technical and subject experts
• language and literacy specialists
• team leaders/supervisors/managers/employers
• specific enterprises
• assessment/training partners
• trainers/teachers and assessors
• training and assessment coordinators

Practice opportunities may include:
• on the job
• off the job but located in participants workplace
• off the job in a special demonstration area
• off the job in an external training room
• work/field placements
• job rotation
• or a combination of the above

Training activities and tasks may include:
• oral presentations
• simulation activities
• project work
• group activities
• practical demonstrations
• assignments
• laboratory work
• shadowing, coaching, mentoring
• computer based learning
• role plays
• interviews
• discussion groups
• surveys
• action learning
• on the job learning
• off the job learning
• practical placements
Evidence Guide

**Critical aspects of evidence:**

**Assessment requires evidence of the following products to be collected:**
- description of target group, characteristics of training participants and appropriate personnel
- outline of training program requirements to deliver training sessions, including any variables to meet to meet the characteristics of training participants
- training session plans
- samples of training materials
- documentation of resources, assessment procedures and support needed in training delivery

**Assessment requires evidence of the following processes to be provided:**
- how appropriate personnel were consulted
- how consultation took place with appropriate how the session plans meet competency requirements and characteristics of training participants
- how the training was made accessible and effective for all training participants
- how training materials and resources were selected
- how training materials were prepared
- why training methods of delivery were selected
- how/why training delivery was modified
- how language, literacy and numeracy issues were taken into consideration in the planning process

**Interdependent assessment of units:**
- this unit of competency may be assessed in conjunction with other units that form part of a job role

**Required knowledge and skills**
- assessment and workplace training competency standards
- relevant competency standards, including industry or enterprise standards of performance
- relationships of competencies to industrial agreements, classification systems and Australian qualifications framework (AQF)
- relevant workplace policies and procedures that apply to that work and (any) related legislation or regulatory requirements
- competency in unit(s) of competency relevant to the training program
- principles of adult learning and competency based training
- identification and correct use of equipment, processes and procedures relevant to unit(s) of competencies
- appropriate methods of analysis and planning
- sources of assistance for participants requiring language or other particular training support
- planning own work, including predicting consequences and identifying improvements
- language, literacy and numeracy skills to:
  - collect, summarise and interpret relevant information to plan a series of programs
  - communicate in spoken and written form with a range of people in specified training context
  - adjust spoken and written language to suit audience
  - prepare and/or customise training materials and specified documentation using clear and comprehensible language and layout
  - calculate and estimate costs, time and length of training sessions
- awareness of language, literacy and numeracy issues relevant to the context of training and assessment, including current theories on the integration of LL&N with technical training
- application of cultural understanding in the context of training and assessment

**Resource implications:**
- access to target group, competency training program including relevant standards and resources
Consistency in performance may include:
- competency in this unit needs to be assessed over a period of time, on multiple occasions, and in a range of contexts involving a combination of direct, indirect and supplementary forms of evidence

Context for assessment:
- assessment may occur on the job or in a simulated workplace

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**BSZ407A Deliver training sessions**

This unit covers the requirements for a person to deliver training sessions as part of a training program.

This unit was taken from the Training Package for Assessment and Workplace Training.

<table>
<thead>
<tr>
<th>Element</th>
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| 1. Prepare training participants | • training program goals and training session outcomes are explained to, and discussed with, training participants  
• the training program workplace applications, training activities and tasks are explained and confirmed with the training participants  
• needs of training participants for competency acquisition are identified  
• the series of training sessions for the training program are explained to training participants  
• ways in which the competencies are to be developed and assessed are explained to, and confirmed with, training participants  
• language is adjusted to suit the training participants and strategies/techniques eg. paraphrasing and questioning are employed to confirm understanding |
| 2. Present training session | • presentation and training delivery are appropriate to the characteristics of training participants and the development of the competencies  
• presentation of training and design of learning activities emphasise and reinforce the components of competency  
  ◊ task skills  
  ◊ task management skills  
  ◊ contingency management skills  
  ◊ job/role environment skills  
  ◊ transfer and application of skills and knowledge to new contexts  
• presentation and training delivery methods provide variety, encourage participation and reinforce competencies  
• spoken language and communication strategies/techniques are used strategically to encourage participation and to achieve the outcomes of training sessions  
• training sessions are reviewed and modified as necessary to meet training participants' needs |
| 3. Facilitate individual and group learning | - the requirements for the effective participation in the learning process is explained  
- timely information and advice is given to training participants during training sessions  
- training presentations are enhanced with the use of appropriate training resources  
- clear and accurate information is presented in a sequence to foster competency development  
- language is adjusted to suit training participants  
- training participants are actively involved in sessions by being encouraged to ask questions, clarify points of concern and contribute comments at appropriate and identified stages  
- training equipment and materials are used in a way that enhances learning  
- supplementary information is provided to enhance and clarify understanding as required by individuals or the group  
- key points are summarised at appropriate times to reinforce learning  
- individual learning and group dynamics are monitored and managed to achieve program goals  
- language, literacy and numeracy issues are taken into account to facilitate learning by training participants |
| 4. Provide opportunities for practice and feedback | - process, rationale and benefits of practice of competency are discussed with training participants  
- practice opportunities are provided to match: ◊ specific competencies to be achieved  
◊ context of the training program  
◊ specific outcomes of the training session  
- training participants' readiness for assessment is monitored and discussed with participants  
- constructive feedback and reinforcement are provided through further training and/or practice opportunities |
| 5. Review delivery of training session | - training participants review of training delivery is sought  
- the delivery of training session is discussed with appropriate personnel at appropriate times  
- trainer self assesses training delivery against program goals, session plans and assessment and workplace training competency standards  
- the reactions of relevant personnel to the delivery are sought and discussed at appropriate times  
- adjustments to delivery, presentation and training are considered and incorporated |
Range of Variables:

**Training program:**
- a collection of training activities to develop competencies of a target group. Clients provide the approvals for expenditure of training resources. Target group include:
  - employee groups eg. particular classification or work area, female employees
  - groups or individuals with special training and or recognition needs

**Appropriate personnel:**
- trainers/teachers and assessors
- team leaders/supervisors/managers/employers
- participant/employee/learner
- technical experts
- government regulatory bodies
- union/employee representatives
- consultative committees
- users of training information such as training providers, employers, human resource departments
- state/territory training/recognition authorities

**Training program may be based on:**
- national industry training packages
- enterprise training packages
- national, state and local curriculum
- enterprise based standards, standards of performance or curriculum
- international standards
- international programs

**Training programs may involve:**
- enterprise based delivery
- provider based delivery:
  - fee for service
  - local, state or national curricula
- community based delivery
- school based delivery
- international programs
- combination of the above

**Target groups competencies may be identified by:**
- reports on assessment of competencies
- content analysis of curriculum vitae
- enterprise training and assessment record keeping system
- industry training and assessment recording system
- self, peer or supervisor reports

**Training sessions may involve:**
- theory
- demonstration
- combination of the two

**Characteristics of participants:**
- language, literacy and numeracy needs
- cultural and language background
- educational background or general knowledge
- gender
- age
- physical ability
- previous experience with the topic
- experience in training and assessment
- level of confidence, nervousness or anxiety.
Training delivery methods may include:
- face to face
- distance
- lock step, partly self paced, all self paced
- trainer centred, participant centred
- real time, time independent
- place dependent, place independent
- interactive eg. audio, or video conferencing, computer assisted, discussion

Training materials may include:
- non-endorsed components of an industry training package
- work books
- workshop guides
- background reading materials/documents
- handouts
- industry/enterprise competency standards
- supportive policies and legislation
- on the job
- off the job but located in participants workplace
- off the job in a special demonstration area
- off the job in external training room
- work/field placements
- job rotation
- or a combination of the above

Training activities and tasks may include:
- oral presentations
- simulation activities
- project work
- group activities
- practical demonstrations
- assignments
- laboratory work
- shadowing, coaching, mentoring
- computer based learning
- role plays
- interviews
- discussion groups
- surveys
- action learning
- on the job learning
- off the job learning
- practical placements

Evidence Guide

Critical aspects of evidence:
Assessment requires evidence of the following products to be collected:
- delivery of training sessions in a number of contexts using a range of delivery methods to competency requirements
- training materials and resources
- trainers self assessment of their own training delivery
- documentation on reaction of appropriate personnel and training participants to delivery of training sessions
- changes made to subsequent delivery practices based on feedback by training participants and appropriate personnel

Assessment requires evidence of the following processes to be provided:
- how training participants were informed of the:
  ◦ programs goals
• competencies to be achieved
• training session outcomes,
• on and/or off the job practice opportunities
• benefits of practice
• training activities and tasks
• assessment tasks and requirements

• how the delivery of the training was conducted to ensure that:
  ◊ training participants were involved in the sessions
  ◊ language, literacy and numeracy issues were taken into consideration

• why particular resource materials were selected
• how the characteristics of training participants were identified and addressed
• how readiness for assessment was determined and confirmed with training participants
• how constructive feedback was provided to the target group about their progress toward the program's goals
• how the group operated in terms of processes and dynamics
• how feedback from target group was received and program adjusted

Interdependent assessment of units:
• this unit of competency may be assessed in conjunction with other units that form part of a job role

Required knowledge and skills:
• knowledge of assessment and workplace training competency standards and assessment guidelines
• relevant competency standards including industry or enterprise standards
• relationships of competencies to industrial agreements, classification systems and the Australian qualifications framework (AQF)
• relevant workplace policies and procedures that apply to that work and (any) related legislation on regulatory requirements eg. occupational health and safety and anti-discrimination regulations
• competency in unit(s) of competency relevant to the training program
• identification and correct use of equipment, processes and procedures relevant to unit(s) of competencies
• understanding of the principles of adult learning and competency based training as applied to target group
• design and/or customisation of effective learning resources
• requirements for compliance with copyright law for resources used in training
• skills in facilitating group and individual learning in specific contexts
• knowledge of training delivery methods/strategies
• skills in the design of activities and tasks to facilitate learning in specific contexts
• sources of assistance for participants requiring language or other particular training support
• planning own work including predicting consequences and identifying improvements
• language, literacy and numeracy required skills to:
  ◊ present information in a clear, logical and coherent manner
  ◊ present technical information using language which mirrors the language used to perform the task or skill in the relevant work context
  ◊ adjust spoken and written language to suit audience
  ◊ employ interaction strategies and techniques eg. probing questioning, active listening & constructive feedback to encourage participation
  ◊ prepare learning resources and materials using language and layout features to suit intended audience
• awareness of language, literacy and numeracy (LL&N) issues and principles in the context of training and assessment, including the integration of LL&N with technical training
• communication skills appropriate to the culture of the workplace, appropriate personnel and target group

Resource implications:
• access to training program, training session plans, requisite training locations, materials and target groups for training
Consistency in performance:
- competency in this unit needs to be assessed over a period of time, in a range of context and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence

Context for assessment:
- assessment should occur in on the job or in a simulated workplace

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</table>
BSZ408A Review training

This unit covers the requirements of persons to record training data and review training.

This unit was taken from the Training Package for Assessment and Workplace Training.

### Element | Performance criteria
---|---
1. Record training data | • details of training program and target group's competency attainment are recorded in accordance with the training system requirements and securely stored
• training records are made available to authorised persons and training participants at the required times, as specified in the training system recording and reporting policy documents

2. Evaluate training | • training is evaluated against identified needs and goals of the training program
• feedback on the training program is sought from training participants and appropriate personnel
• training participants are encouraged to evaluate how progress towards achieving competency was enhanced by the training sessions
• trainer's performance is reviewed against:
  ◊ program goals
  ◊ the assessment and workplace training competency standards
  ◊ training participants' comments
  ◊ training participants' competency attainment
• results of the evaluation are used to improve current and future training
• suggestions are made for improving any aspect of the recording procedure

3. Report on training | • reports on outcomes of the training sessions are developed and distributed to appropriate personnel

Range of Variables:

**Training program:**
- a collection of train activities to develop competencies. Clients provide the approvals for expenditure of training resources. Target group is the group for whom training is available and may include:
  ◊ employee groups eg. particular classification or work area, female employees
  ◊ groups or individuals with special training and or recognition needs

**Training may be:**
- on the job
- in a simulated setting
- in a training organisation
- in a combination of locations to suit the units of competency being developed and/or assessed
- in a single site or a multi site operation
- a combination of the above
Clients may include:
- a department/division
- a work area
- an enterprise or organisation

Client needs may include:
- increased productivity
- increased enterprise profitability
- attainment of specified industry or enterprise competencies
- achievement of community priorities
- achievement of government priorities

Characteristics of participants may include:
- language, literacy and numeracy needs
- cultural language and education background
- educational background or general knowledge
- gender
- age
- physical ability
- previous experience with the topic
- experience in training and assessment
- level of confidence, nervousness or anxiety

Training system may be developed by:
- the industry
- the enterprise
- the training organisation
- a combination of the above
- on a proforma or template
- written
- verbal
- combination of the above

Training evaluation may include:
- affective eg. satisfaction with the program
- cognitive eg. knowledge or skill gain
- performance or behaviour eg. absenteeism from work, productivity

Appropriate personnel may include:
- trainers/teachers and assessors
- team leaders/supervisors/managers/employers
- participant/employee/learner
- technical experts (eg language and literacy coordinators)
- government regulatory bodies
- union/employee representatives
- consultative committees
- users of training information such as training providers, employers, human resource departments
- state/territory training/recognition authorities.

Record systems may be:
- paper based
- computer based systems using magnetic or optical storage
- combination of both paper and computer based systems

Record systems may be:
- theory
- demonstration
• or a combination of the two

**Training programs may involve:**
• enterprise based delivery
• provider based delivery:
  ◊ fee for service
  ◊ local, state or national curricula
• community based delivery
• school based delivery
• international programs
• combination of the above

**Variables for achieving competency may include:**
• participant characteristics
• resources (time, location, space, people and costs)
• language, literacy and numeracy issues.

**Training delivery methods:**
• face to face
• distance
• lock step, partly self paced, all self paced
• trainer centred, participant centred
• real time, time independent
• place dependent, place independent
• interactive (eg audio, or video conferencing, computer assisted, discussion)

**Training materials may include:**
• non-endorsed components of an industry training package
• work books
• workshop guides
• background reading materials/documents
• handouts
• industry/enterprise competency standards
• supportive policies and legislation

**Training support may come from:**
• technical and subject experts including particular subject and language and literacy specialists
• language and literacy specialists
• team leaders/supervisors/managers/employers
• specific enterprises
• assessment/training partners
• trainers/teachers and assessors
• training and assessment coordinators

**Practice opportunities may be:**
• on the job
• off the job but located in participants workplace
• off the job in a special demonstration area
• off the job in external training room
• work/field placements
• job rotation
• or a combination of the above
Evidence Guide

Critical aspects of evidence:
Assessment requires evidence of the following products to be collected:
- evaluation reports in accordance with performance criteria (trainer, trainees and appropriate personnel)
- training and assessment records
- reports on the outcomes of the training sessions and training program
- plans for current and future training programs and activities
- promotional materials/reports
- costs incurred

Assessment requires evidence of the following processes to be provided:
- How and why evaluation methods were selected
- How evaluation information was gathered and acted upon
- How the report on training sessions/programs was made to appropriate personnel
- How records are maintained, kept confidential and secured

Interdependent assessment of units
- this unit of competency may be assessed in conjunction with other units that form part of a job role

Required knowledge and skills:
- assessment and workplace training competency standards
- relevant competency standards, including industry or enterprise standards of performance
- legal and ethical responsibilities including occupational health and safety regulations and procedures, equal employment and anti-discrimination requirements and other policies relevant to the specified context
- policies and procedures relating to the organisations training system including those requirements for recording and maintaining confidential, secure and accurate records
- evaluation and review methodologies including those that produce qualitative and quantitative data
- establishment of criteria to evaluate training programs
- adaptation and use of training record systems for formative and summative assessment
- planning own work including predicting consequences and identifying improvements
- language, literacy and numeracy skills such as those required to:
  ◊ collect, organise and analyse data
  ◊ prepare reports, questionnaires and promotional material
  ◊ present qualitative and quantitative data in a clear and coherent manner
  ◊ use probing questioning and active listening techniques to seek feedback on training
  ◊ adjust spoken and written language to suit audience
- awareness of language, literacy and numeracy issues and principles in the context of training and assessment, including the integration of LLN with technical training
- application of cultural understanding in the context of training and assessment

Resource implications:
- access to training record systems, programs, and appropriate personnel
- opportunities to discuss training outcomes with appropriate personnel. Access to unit(s) of competency to be assessed, relevant training programs and materials and resources for the development of training arrangements

Consistency in performance may include:
- competency in this unit needs to be assessed over a period of time, in a range of contexts on multiple occasions, involving a combination of direct, indirect and supplementary forms of evidence
**Context for assessment**
- assessment should occur on the job or in a simulated workplace

<table>
<thead>
<tr>
<th>KEY COMPETENCIES</th>
<th>Collect, Analyse &amp; Organise Information</th>
<th>Communicate Ideas &amp; Information</th>
<th>Plan &amp; organise Activities</th>
<th>Work with Others &amp; in Teams</th>
<th>Use Mathematical Ideas &amp; Techniques</th>
<th>Solve Problems</th>
<th>Use Technology</th>
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