![Maldives National Skills Development Authority logo]

Maldives National Skills Development Authority

National Competency Standard for Company Administration

Standard Code: SOC07S18V2

Technical Panel members		
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TVET Authority	-	Ministry of Education

KEY FOR CODING

Coding Competency Standards and Related Materials

Industry Sector as per ESC (Three letters)	Construction Sector (**CON**) Fisheries and Agriculture Sector (**FNA**) Transport sector (**TRN**) Tourism Sector (**TOU**) Social Sector (**SOC**) Foundation (**FOU**)
Competency Standard	**S**
Occupation with in a industry Sector	**Two digits 01-99**
Unit	**U**
Common Competency	**1**
Core Competency	**2**
Optional/ Elective Competency	**3**
Assessment Resources Materials	**A**
Learning Resources Materials	**L**
Curricula	**C**
Qualification	**Q1, Q2 etc**
MNQF level of Qualification	**L1, L2 etc**
Version Number	**V1, V2 etc**
Year of endorsement of standard, qualification	**By two digits Example- 07**

NATIONAL CERTIFICATE III IN COMPANY ADMINISTRATION

Qualification code: SOC07SQ1L318	**Total Number of Credits:** 40

Purpose of the qualification

The holders of this qualification are expected to work as an Administrative Officers, mainly in an office and will be working under the supervision of an Office Administrator

Regulations for the qualification	National Certificate III in Company Administration will be awarded to those who are competent in units 1+2+3+4+5+6+7+8+9+10

Schedule of Units

1. Observe personal and workplace hygiene practices

2. Practice health, safety and security practices

3. Provide effective customer care

4. Practice effective workplace communication

5. Perform computer operations

6. Organise schedules

7. Maintain financial records

8. Process payroll

9. Organise workplace information

10. Maintain business resources

Accreditation requirements	The training provider should have an office set up or similar training facility to provide the trainees the hands-on experience related to this qualification
Recommended sequencing of units	As appearing under the section 06

NATIONAL CERTIFICATE IV IN COMPANY ADMINISTRATION

Qualification code: SOC07SQ2L418	**Total Number of Credits:** 130

Purpose of the qualification

The holders of this qualification are expected to work as an Administrative Officers, mainly in an office and will be working under the supervision of an Office Administrator

Regulations for the qualification	National Certificate IV in Company Administration will be awarded to those who are competent in units 1+2+3+4+5+6+7+8+9+10+11+12+13+14+15+16+17+18+19+20+21+22+23

Schedule of Units

1. Observe personal and workplace hygiene practices

2. Practice health, safety and security practices

3. Provide effective customer care

4. Practice effective workplace communication

5. Perform computer operations

6. Organise schedules

7. Maintain financial records

8. Process payroll

9. Ogranise workplace information

10. Maintain business resources

11. Support the recruitment, selection and induction of staff

12. Supervise an established records system to ensure its integrity

13. Organize and provide information in response to requests

14. Provide advice in order to meet current and anticipated client requirements

15. Apply knowledge of employee's and employer's rights and responsibilities to workplace environment	
16. Plan meetings to enable the stated objectives of the meetings to be met	
17. Produce complex documents	
18. Identify and use new and existing technology to meet the needs of the enterprise	
19. Plan business trip and associated itineraries	
20. Produce reports as required for cash flow forecasts and budgetary purposes	
21. Supervise the team to ensure team goals are achieved	
22. Plan and promote a Training Program	
23. Review training	
Accreditation requirements	The training provider should have an office set up or similar training facility to provide the trainees the hands-on experience related to this qualification
Recommended sequencing **of units**	As appearing under the section 06

UNIT DETAILS

1.	Observe personal and workplace hygiene practices	SOC03S1U01V1	3	3
2.	Practice health, safety and security practices	SOC03S1U02V1	3	3
3.	Provide effective customer care	SOC03S1U03V1	3	3
4.	Practice effective workplace communication	SOC03S1U04V1	3	3
5.	Perform computer operations	SOC03S1U05V1	3	5
6.	Organise schedules	SOC25S1U01V1	3	3
7.	Maintain financial records	SOC25S1U02V1	3	5
8.	Process payroll	SOC25S1U03V1	3	5
9.	Ogranise workplace information	SOC25S1U04V1	3	5
10.	Maintain business resources	SOC25S1U05V1	3	5
11.	Support the recruitment, selection and induction of staff	SOC25S1U06V1	4	8
12.	Supervise an established records system to ensure its integrity	SOC25S2U01V1	4	6
13.	Organize and provide information in response to requests	SOC25S2U02V1	4	6
14.	Provide advice in order to meet current and anticipated client requirements	SOC25S2U03V1	4	6
15.	Apply knowledge of employee's and employer's rights and responsibilities to workplace environment	SOC25S2U04V1	4	10

16.	Plan meetings to enable the stated objectives of the meetings to be met	SOC25S2U05V1	4	6
17.	Produce complex documents	SOC25S2U06V1	4	10
18.	Identify and use new and existing technology to meet the needs of the enterprise	SOC25S2U08V1	4	6
19.	Plan business trip and associated itineraries	SOC25S2U09V1	4	6
20.	Produce reports as required for cash flow forecasts and budgetary purposes	SOC25S2U11V1	4	10
21.	Supervise the team to ensure team goals are achieved	SOC25S2U12V1	4	6
22.	Plan and promote a Training Program	SOC25S2U13V1	4	5
23.	Review training	SOC25S2U14V1	4	5

Packaging of National Qualifications:

National Certificate III in Company Administration will be awarded to those who are competent in units 1+2+3+4+5+6+7+8+9+10

Qualification Code: SOC25SQ1L318

National Certificate IV in Company Administration will be awarded to those who are competent in units 1+2+3+4+5+6+7+8+9+10+11+12+13+14+15+16+17+18+19+20+21+22+23

Qualification Code: SOC25SQ2L418

Competency Standard for

Company Administration

1.	Observe personal and workplace hygiene practices
2.	Practice health, safety and security practices
3.	Provide effective customer care
4.	Practice effective workplace communication
5.	Perform computer operations
6.	Organise schedules
7.	Maintain financial records
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11.	Support the recruitment, selection and induction of staff
12.	Supervise an established records system to ensure its integrity
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14.	Provide advice in order to meet current and anticipated client requirements
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22.	Plan and promote a Training Program
23.	Review training

Description of a Company Administration

Administrative Officer in the Maldivian context is a service provider in the field of Office Administration in the social and the private sector. The personnel who completes the Company Administration standard is expected to work under the supervision of a Manager or any other person who is a professional of the field that could provide the required guidance and supervision. The Administrative Officer shall provide customer oriented and friendly service at the required level in Maldives.

Competency Standard Development Process

The competencies were determined based on the analysis of the tasks expected to be performed by a staff working in the Administrative Department in the private sector in the Maldives. The task analysis was based on the existing documents prepared among the experts in the industry and on the advice of the experts in the field of Company Administration training in Maldives. Competency standards used for similar type of training in other countries were also examined. Extensive referencing was done from the training packages available at training.gov.au.

Unit 01

UNIT TITLE	Observe personal and work place hygiene practices					
DESCRIPTOR	This unit covers the knowledge, skills and attitudes required to observe workplace hygiene procedures and maintaining of personal presentation and grooming standard. This unit deals with necessary skills and knowledge required for maintaining the hygiene of workers and the hygienic practices that should be applied while on the job.					
CODE	SOC03S1U01V1	Level	3	Credit	3

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Observe grooming, hygiene and personal presentation standards	1.1 Grooming, hygiene and personal presentation practices maintained at high standards in line with industry norms and enterprise procedures 1.2 Adequate level of personal cleanliness observed throughout the work 1.3 Effects of poor personal hygiene
2. Follow hygiene procedures	2.1 Workplace hygiene procedures followed in line with enterprise procedures and legal requirements 2.2 Eating, drinking, smoking, spitting, scratching or other such practices avoided while on the job 2.3 Hygiene standards of workplace maintained in line with enterprise
3. Identify and avoid hygiene risks	3.1 Hygiene risks understood and avoided in line with general standards and guidelines 3.2 Legislations on hygiene understood and properly followed

RANGE STATEMENT

Procedures included;

- Grooming and personal presentation
- Personal and work place hygiene

Tools, equipment and materials required may include:

Nil

ASSESSMENT GUIDE

Form of assessment

- Assessment for the unit needs to be holistic and observed during assessment of other units of competency which forms the qualification.
- Any written or oral examinations may include questions related to hygiene, illness and personal grooming standard.

Assessment context

Assessment may be done in workplace or a simulated work environment.

Critical aspects

It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations in the critical aspects of:

- Maintaining adequate level of all aspects of personal hygiene and cleanliness
- Following cleaning procedures for effective cleaning of work areas
- Immediately reporting any symptoms of illness
- Undertaking routine medical check-ups
- This unit may be assessed in conjunction with all and units which form part of the normal job role

Assessment conditions

- Theoretical assessment of this unit must be carried out in an examination room where proper examination rules are followed.
- Assessment of hygienic work practices must be constantly evaluated.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• Knowledge of national hygiene regulation regarding personal grooming standard and presentation • General knowledge of common terminologies used in hygiene including personal hygiene • Knowledge on general symptoms of different types of diseases • Detailed knowledge and importance of illness and injury	• Ability to follow procedures and instructions • Competent to work according to relevant hygiene regulations and procedures • Competent to work to meet requirements for personnel hygiene and hygienic practices • Communication skills • Interpersonal skills

Unit 02

UNIT TITLE	Practice health, safety and security Practices				
DESCRIPTOR	This unit describes the importance of health and safety in the working environment. It identifies the key safety hazards within the work area and recognizes the correct manner in which to safely carry out the tasks of the job, for the benefit of the trainee, colleagues and customers.				
CODE	SOC03S1U02V1	**Level**	3	**Credit**	3

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Follow workplace health, safety and security procedures	1.1 Health, safety and security procedures followed in line with operational policies and procedures and laws and regulations 1.2 Illnesses reported through proper channels of communication, using relevant forms and formats, in line with enterprise procedures 1.3 Safety and security breaches reported through proper channels of communication, in line with enterprise procedures
2. Deal with emergency situations	2.1 Emergency situations recognized and appropriate procedures followed in line with enterprise procedures 2.2 Assistance sought and cooperation given in emergency situations in line with enterprise procedures 2.3 Emergency incidences reported in line with enterprise procedures
3. Identify and prevent hygiene risks	3.1 Hygiene risks identified, prevented and avoided in line with enterprise procedures 3.2 Hygiene risks reported to appropriate persons and corrective action taken in line with enterprise procedures
4. Clean the work area	4.1 Cleaning tasks accomplished to enterprise standards 4.2 Proper method for cleaning selected and employed for appropriate task

5. Secure work premised	5.1 Work premises closed and locked at the end of work, in line with enterprise procedures

RANGE STATEMENT

Procedures included:

- Guidelines for safe handling of equipment of utensils
- Emergency procedures
- Fire safety procedures
- Security and safety guidelines
- Cleaning and decontamination procedures
- Waste handling procedures
- Cleaning chemicals handling guidelines
- Accident and incidence reporting procedures
- Basic first aid procedures

Tools, equipment and materials required may include:

- Relevant procedure manuals

ASSESSMENT GUIDE

Forms of assessment

Assessment for the unit needs to be holistic and must be observed through real or simulated workplace activities.

Assessment context

Assessment of this unit must be completed on the job or in a simulated work environment which reflects a range of safe working practices.

Critical aspects (for assessment)

It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations in the critical aspects of:

- Communicating effectively with others involved in or affected by the work.
- Identifying and assessing hazardous situations and rectifying or reporting to the relevant persons.
- Safely handling and storage of dangerous and/or hazardous goods and substances.
- Applying safe manual handling practices.
- Safely and effectively operating equipment and utilising materials over the full range of functions and processes for work undertaken on worksite.
- This unit may be assessed in conjunction with all and units which form part of the normal job role.

Assessment conditions

Assessment must reflect and events processes that occur over a period of time

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
- General knowledge on safe practices - Communication procedures - Relevant workplace procedures and guidelines	- Undertake safe manual handling jobs - Competent to follow safety regulations - Competent to work safely with workplace equipment's, materials and colleagues

Unit 03

UNIT TITLE	Provide effective customer care				
DESCRIPTOR	This unit addresses the importance of caring for customers in the relevant industry. It shows how customer care relates to quality service and the best methods of anticipating and meeting customer's need.				
CODE	SOC03S1U03V1	**Level**	3	**Credit**	3

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Greet customers and colleagues	1.1 Customers and colleagues greeted according to standard procedures and social norms 1.2 Sensitivity to cultural and social differences demonstrated
2. Identify and attend to customer needs	2.1 Appropriate interpersonal skills are used to ensure that customer needs are accurately identified 2.2 Customer needs are assessed for urgency so that priority for service delivery can be identified 2.3 Personal limitation in addressing customer needs is identified and where appropriate, assistance is sought from supervisor 2.4 Customers informed correctly 2.5 Personal limitation identified and assistance from proper sources sought when required
3. Deliver service to customers	3.1 Customer needs are promptly attended to in line with organizational procedure 3.2 Appropriate rapport is maintained with customer to enable high quality service delivery 3.3 Opportunity to enhance the quality of service and products are taken wherever possible

4. Handle inquires	4.1 Customer queries handled promptly and properly
	4.2 Personal limitations identified and assistance from proper sources sought when
5.	5.1 Responsibility for handling complaints taken within limit of responsibility
	5.2 Personal limitations identified and assistance from proper sources sought when required
	5.3 Operational procedures to handling irate or difficult customers followed correctly
	5.4 Details of complaints and comments from

RANGE STATEMENT

Procedures included:

- Greeting procedure
- Complaint and comment handling procedure
- Incidence reporting procedures
- General knowledge of property
- Standard operating procedures for service deliveries
- Non-verbal and verbal communication
- Dress and accessories
- Gestures and mannerisms
- Voice tonality and volume
- Culturally specific communication customs and practices
- Cultural and social differences

Includes but are not limited to:

- Modes of greeting, fare welling and conversation
- Body language/ use of body gestures
- Formality of language

Interpersonal skills:

- Interactive communication

- Good working attitude
- Sincerity
- Pleasant disposition
- Effective communication skills
- Customer needs

Customer with limitation may include:

- Those with a disability
- Those with special cultural or language needs
- Unaccompanied children
- Parents with young children
- Pregnant women
- Single women

Tools, equipment and materials required may include

- Relevant procedure manuals

- Availability of telephone, fax machine, internet, etc.

- Availability of data on projects and services; tariff and rates, promotional activities in place etc.

ASSESSMENT GUIDE

Form of assessment

Assessment for the unit needs to be holistic and must include real or simulated workplace activities.

Assessment context

Assessment of this unit must be completed on the job or in a simulated work environment which reflects a range of practices.

Critical aspects (for assessment)

It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations. This unit may be assessed in conjunction with all units which form part of the normal job role.

Assessment requires evidence that the candidate:

- Complied with industry practices and procedures
- Used interactive communication with others
- Complied with occupational, health and safety practices
- Promoted public relation among others
- Complied with service manual standards
- Demonstrated familiarity with company facilities, products and services
- Applied company rules and standards
- Applied telephone ethics
- Applied correct procedure in using telephone, fax machine, internet
- Handled customer complaints
- Depict effective communication skills

Assessment conditions

Assessment must reflect both events and processes over a period of time.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning Knowledge	Underpinning Skills
- General knowledge of the implications on efficiency, morale and customer relations - General knowledge of ways of caring for customers - Knowledge of handling customer complain and other requests - General knowledge of Safe work practices and Personal hygiene - General knowledge of different types of service available for guest - General knowledge of up selling - Attitude: - Attentive, patient and cordial - Eye-to-eye contact - Maintain teamwork and cooperation - Theory:	- Competent in providing customer care - Ability to work calmly and unobtrusively effectively - Ability to handle telephone inquiries and conversations - Correct procedure in handling telephone inquiries - Proper way of handling complaints - Effective communication skills - Non-verbal communication - body language - Good time management - Inter personal skills

Unit 04

UNIT TITLE	**Practice effective workplace communication**				
DESCRIPTOR	This unit addresses the need for effective communication in the relevant industry. It describes the ethics of communication and shows the importance of selecting the best method of communication during various situations. It also identifies the barriers to communication and explains how to overcome them. The unit also describes how to use the telephone; the procedures for answering, transferring and holding calls, making outgoing calls and taking messages. In addition, it also highlights the need for cleaning telephone equipment.				
CODE	SOC3S1U04V1	**Level**	3	**Credit**	3

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Communicate with customers and colleagues	1.1 Proper channels and methods of communication used 1.2 Workplace interactions with customers and colleagues appropriately made 1.3 Appropriate lines of communication followed 1.4 Verbal and non-verbal communications are appropriate to the given situation 1.5 Non- verbal communication of customer is observed responding to customer
2. Participate in workplace meetings and discussions	2.1 Meetings and discussions attended on time 2.2 Procedures to expressing opinions and following instructions clearly followed 2.3 Questions asked and responded to effectively 2.4 Meeting and discussion outcomes interpreted and implemented correctly

3. Handle relevant work-related documentation	3.1 Conditions of employment understood correctly
	3.2 Relevant information accessed from appropriate sources
	3.3 Relevant data on workplace forms and other documents filled correctly
	3.4 Instructions and guidelines understood and followed properly
	3.5 Reporting requirements completed properly
4. Handle telephone	4.1 Procedures for taking messages and making outgoing calls followed correctly
	4.2 Incoming calls answered correctly
	4.3 Calls put on hold and transferred properly
	4.4 Outgoing calls made efficiently
	4.5 Communication in both English and Dhivehi demonstrated correctly

RANGE STATEMENT

Procedures included:

- Organizational hierarchy and reporting order
- Communications procedures
- Telephone handling procedures

Aspects evaluated:

- Verbal and Non-verbal communication
- Interpersonal skills
- General attitude to customers, colleagues and work
- Conformity to policies and procedures

Tools, equipment and material used in this unit may include

- Telephone

- Note pads
- Pens
- Forms and formats related to inter-personal communication

ASSESSMENT GUIDE

Forms of assessment

Assessment for the unit needs to be continuous and holistic and must include real or simulated workplace activities

Assessment context

Assessment of this unit must be completed on the job or in a simulated work environment which reflects a range of opportunities for communication.

Critical aspects (for assessment)

It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations in the critical aspects of communicating effectively with others involved in or affected by the work. This unit may be assessed in conjunction with all and units which form part of the normal job role

Assessment conditions

It is preferable that assessment reflects a process rather than an event and occurs over a period of time to cover varying circumstances.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning Knowledge	Underpinning Skills
• General knowledge of English and Divehi grammar • General knowledge of common telephone equipment • General knowledge on effective communication	• Undertake effective customer relation communications • Competent in communicating basic with customers • Fluency in English and Dhivehi language usage

Unit 05

UNIT TITLE	**Perform Computer Operations**				
DESCRIPTOR	This unit covers the knowledge, skills and attitudes and values needed to perform computer operations that include inputting, accessing, producing and transferring data using the appropriate hardware and software.				
CODE	SOC03S1U05V1	**Level**	3	**Credit**	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Input data into computer	1.1. Data entered into the computer using appropriate program/application in accordance with company procedures 1.2. Accuracy of information checked and information saved in accordance with standard operating procedures 1.3. Input data stored in storage media according to requirements
2. Access information using computer	2.1 Correct program/application selected based on job requirements 2.2 Program/application containing the information required accessed according to company procedures 2.3 Desktop icons correctly selected, opened and closed for navigation purposes
3. Produce/output data using computer system	3.1 Entered/stored data processed using appropriate software commands 3.2 Data printed out as required using computer hardware/peripheral devices in accordance with standard operating procedures 3.3 Files and data transferred between compatible systems using computer software, hardware/ peripheral devices in accordance with standard operating procedures

4. Work on documents	4.1 Open documents and add text and symbols according to information requirements. Use various formatting tools throughout the drafting of a document. 4.2 Create a mailing list with acceptable layout for mail merge purposes without the loss of relevant information. Merge mailing list 4.3 Print document or part of the document
5. Work on spreadsheets	5.1 Enter numbers, text, symbols and formulas in cells according to information requirements 5.2 Display spreadsheet data in different charts 5.3 Print document or part of the document
6. Work on presentations	6.1 Create a simple design for a presentation according to organizational requirements 6.2 Use templates and simple formatting tools to create a presentation 6.3 Print document or part of the document

RANGE STATEMENT

This unit covers computer hardware to include personal computers used independently or within networks, related peripherals, such as printers, scanners, keyboard and mouse, and storage media such as disk drives and other forms of storage. Software used must include but not limited to word processing, spreadsheets, database and billing software packages and Internet browsing software.

Tools, equipment and materials required may include:

- Storage devices
- Different software and hardware
- Personal computers system
- Laptop computers
- Printers
- Scanners,
- Keyboard

- Mouse,

- Disk drives /CDs, DVDs, compressed storage devices

- Microsoft Office package

ASSESSMENT GUIDE
Forms of assessment
The assessor may select two of the following assessment methods to objectively assess the candidate:

- Observation
- Questioning
- Practical demonstration

Assessment context

Assessment may be conducted out of the workplace preferably in a computer classroom
Critical aspects (for assessment)
Assessment must show that the candidate:

- Selected and used hardware components correctly and according to the task requirement

- Identified and explain the functions of both hardware and software used, their general features and capabilities

- Produced accurate and complete data in accordance with the requirements

- Used appropriate devices and procedures to transfer files/data accurately

Assessment conditions
Assessment may be conducted out of the work environment and may include assignments and projects.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• Basic ergonomics of keyboard and computer use • Main types of computers and basic features of different operating systems • Main parts of a computer • Storage devices and basic categories of memory • Relevant software • Microsoft Office Package • General security and computer Viruses	• Reading skills required to interpret work instruction • Communication skills • Keyboard skills

Unit 06

UNIT TITLE	**Organize Schedules**				
DESCRIPTOR	This unit covers the knowledge, skills and attitudes and values needed to organize schedules				
CODE	SOC25S1U01V1	Level	3	Credit	3

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Establish schedule requirement	1.1 Identified organisational requirements and protocols for diaries and staff planning tools 1.2 Identified organisational procedures for different types of appointments 1.3 Determined personal requirements for diary and schedule items for individual personnel 1.4 Established appointment priorities and clarify in discussion with individual personnel
2. Manage schedules	2.1 Identified recurring appointments and deadlines, and schedule these in accordance with individual and organisational requirements 2.2 Established availability of attendees, and schedule new appointments in accordance with required timelines and diary commitments 2.3 Negotiated alternative arrangements and confirm when established appointments are changed 2.4 Recorded appointments and manage schedules in accordance with organisational policy and procedures

RANGE STATEMENT

Organisational requirements may include:

- availability of information
- electronic linked diaries and schedules
- linking personal and executive diaries
- priority clients and personnel
- protocols in contacting other personnel within and outside organisation
- recording systems

Planning tools may include:

- appointment book
- appointment view and planner view in electronic scheduling systems
- calendar
- desk diary
- electronic calendar or diary
- in/out boards and whiteboards
- manual planners
- planning wall chart

Diary and schedule items may include:

- conferences
- deadlines
- leave (for both immediate person and others whose absence affects the person)
- meetings
- recurring appointments
- teleconferences
- travel

Recurring appointments may include

- board meetings
- committee meetings

- staff meetings

Alternative arrangements may include:

- cancelling pre-arranged appointments
- inserting additional appointments after a schedule has been prepared
- re-scheduling existing appointments

Appointments may be recorded in:

- calendar
- diary
- electronic system
- filing system
- paper system

Organisational policy and procedures may include:

- adequate time between appointments
- leave
- limit on total appointments in any one day
- lunch breaks
- stress minimisation
- sufficient time to complete projects and to meet deadlines

ASSESSMENT GUIDE

Form of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
- review of authenticated documents from the workplace or training environment
- analysis of responses to case studies and scenarios

- demonstration of techniques in a workplace or simulated environment
- review of testimony from team members, colleagues, supervisors or managers.

Assessment context
Critical aspects (for assessment)

- maintaining schedules which meet individual and organisational needs
- prioritising and negotiating competing demands.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations	• communication skills to discuss and confirm requirements and priorities of others and to question others to clarify information • literacy skills to read a range of procedural texts and to write simple instructions • negotiation skills to schedule appointments where there are competing demands • numeracy skills to estimate time, plan accurately and keep records • problem-solving skills to negotiate task distribution and timing for appointments with other members of the group • time management skills to allow realistic time lines to schedule appointments.

Unit 07

UNIT TITLE	Maintain financial records				
DESCRIPTOR	This unit describes the skills and knowledge required to maintain daily financial records such as reconciling debtors' and creditors' systems, preparing and maintaining a general ledger and trial balance and includes activities associated with monitoring cash control for accounting purposes.				
CODE	SOC25S1U02V1	Level	3	Credit	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Maintain daily financial records	1.1 Correctly maintained daily financial records in accordance with organisational and legislative requirements for accounting purposes 1.2 Identified and rectified or refer discrepancies or errors in documentation or transactions to designated persons in accordance with organisational and legislative requirements 1.3 Accurately credited and debited transactions and promptly enter into journals in accordance with organisational and legislative requirements
2. Maintain general ledger	2.1 Maintained general ledger in accordance with organisational and legislative requirements 2.2 Post transactions into general ledger in accordance with organisational and legislative reporting requirements 2.3 Reconciled systems for accounts payable and receivable with general ledger 2.4 Accurately prepared trial balance from general ledger in accordance with organisational and legislative requirements

3. Monitor cash control	3.1 Ensured cash flow is accurately accounted for in accordance with organisational and legislative requirements
	3.2 Made and received payments in accordance with organisational and legislative requirements
	3.3 Collected or followed up outstanding accounts within designated timelines
	3.4 Checked payment documentation for accuracy of information and despatch to creditors within designated timeline

RANGE STATEMENT

Organisational requirements may include:

- designated time lines
- guidelines for reconciling journals
- legal and organisational policies, guidelines and requirements
- procedures for totalling adjusted journals
- quality assurance and/or procedures manuals
- resolution procedures
- security procedures

Discrepancies may relate to:

- bank charges
- dishonoured cheques
- errors in transposing between source documents and journals
- interest

Documentation may include:

- purchase credit notes
- purchase invoices
- sales credit notes
- sales invoices

Designated persons may include:

- bank
- line management
- organisation's authorisations department
- statutory body
- supervisor

Journals may include:

- cash payments
- cash receipts
- purchases and purchase returns
- sales and sales returns

Transactions may include:

- commencing business entries
- correction of posting errors
- interest expense
- interest receivable
- non-cash transactions (e.g. writing-off depreciation, stock losses)
- purchase of a fixed asset on credit
- sale of a fixed asset on credit
- withdrawal of stock/assets by owner
- write-off a bad debt

Reconciling systems for accounts payable and receivable may include:

- checking accuracy of creditor account balances (e.g. cash payments journal, purchases journal, purchases returns journal, general journal)
- checking accuracy of debtor account balances (e.g. cash receipts journal, sales return journal, general journal)
- checking cash payments and receipt journals against bank statement
- checking the total of the creditor's schedule equals the balance of the creditor's control account
- checking the total of the debtor's schedule equals the balance of the debtor's control account

Payments may include:

- cash
- cheque
- credit card
- direct debit

Designated time lines may include:

- by month end
- monthly
- within agreed period
- within organisational deadline

ASSESSMENT GUIDE

Form of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate

- review of identification and rectification or referral of discrepancies or errors in documentation or transactions
- analysis of responses to case studies and scenarios
- demonstration of techniques
- oral or written questioning to assess knowledge of financial record keeping
- examples of financial documentation.

Assessment context
Critical aspects (for assessment)

- identifying and responding to discrepancies and errors
- transferring and recording financial data accurately
- reconciling expenditures and revenue
- knowledge of organisational policies and procedures relating to maintaining financial records.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• key provisions of relevant legislation from all levels of government that may affect aspects of business operations	• literacy skills to identify financial information; to read and understand the organisation's accounting procedures; and to edit and proofread documents to ensure conformity and consistency of information • communication skills to clarify information and to refer errors or discrepancies to appropriate people • numeracy skills to read and interpret financial data and to prepare cash analysis sheets • problem-solving skills to reconcile figures

Unit 08

UNIT TITLE	Process payroll				
DESCRIPTOR	This unit describes skills and knowledge required to process payroll from provided data using manual and computerised payroll systems. It applies to individuals employed in a range of work environments who are responsible for payroll functions within an organisation. They may work as individuals providing administrative support within an enterprise or may be other members of staff who have been delegated payroll responsibilities.				
CODE	SOC25S1U03V1	Level	3	Credit	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Record payroll data	1.1 Checked payroll data and clarify discrepancies with designated persons 1.2 Entered employee pay period details and any deductions and allowances in payroll system in accordance with source documents 1.3 Calculated payment due to individual employees to reflect standard pay and variations in accordance with employee source data
2. Prepare payroll	2.1 Prepared payroll within designated timelines and in accordance with organisational policy and procedures 2.2 Reconciled total wages for pay period, check or correct irregularities or refer to designated persons for resolution 2.3 Made arrangements for payment in accordance with organisational and individual requirements

	2.4 Obtained authorisation of payroll and individual pay advice in accordance with organisational requirements
	2.5 Produced, checked and stored payroll records in accordance with organisational policy and security procedures
	2.6 Followed security procedures for processing payroll and for maintaining payroll records
3.Handle payroll enquiries	3.1 Responded to payroll enquiries in accordance with organisational and legislative requirements
	3.2 Provided information in accordance with organisational and legislative requirements
	3.3 Ensured all enquiries outside area of responsibility and knowledge are referred to designated persons for resolution
	3.4 Completed additional information or follow-up action within designated timelines in accordance with organisational policy and procedures

RANGE STATEMENT

Designated persons may include:

- immediate supervisor
- those who have the authority to approve payroll decisions

Pay period details may include:

- bonus
- casual wage

- commission
- contract
- piecework
- salary
- wage

Deductions and allowances may include:

- health insurance
- income tax
- meal allowance
- travel allowance

Payroll system may include:

- manual
- computerized

Source documents may include:

- employee earnings and payroll register
- employee records or history
- employee timesheets

Variations may include:

- overtime
- paid leave
- rates of pay
- sick leave
- unpaid leave

Preparing payroll may include:

- calculation of gross pay
- cash analysis

- electronic funds transfer
- net pay
- preparing cheques
- preparing pay advice slips
- taxation and other deductions

Payroll records may include:

- cash analysis sheets
- employee summary report
- end of month reports
- end of year reports
- pay advice slips

Enquiries may include:

- email
- face-to-face
- fax
- telephone

ASSESSMENT GUIDE

Form of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
- review of authenticated documents from the workplace or training environment
- analysis of responses to case studies and scenarios
- demonstration of techniques.

Assessment context
Critical aspects (for assessment)
- performing payroll calculations

- applying knowledge of organisational guidelines relating to security and confidentiality of information.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations	• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to read and understand organisation's financial policies and procedures, and any procedures based on legislative requirements • numeracy skills to perform calculations and to reconcile figures • problem-solving skills to reconcile figures and to resolve employee enquiries within scope of own responsibility.

Unit 09

UNIT TITLE	Organise workplace information				
DESCRIPTOR	This unit describes the skills and knowledge required to gather, organise and apply workplace information in the context of an organisation's work processes and knowledge management systems. It applies to individuals who perform a defined range of skilled operations in various work contexts. They may exercise discretion and judgement using appropriate knowledge of information management to provide technical advice and support to a team.				
CODE	SOC25S1U04V1	Level	3	Credit	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Collect and assess information	1.1 Accessed product and service information in accordance with organisational requirements
	1.2 Ensured methods of collecting information are reliable and make efficient use of available time and resources
	1.3 Assessed information for clarity, accuracy, currency and relevance to intended tasks
	1.4 Used interpersonal skills to access relevant information from teams and individuals
2. Organise information	2.1 Organised information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements
	2.2 Used appropriate technology/systems to maintain information in accordance with organisational requirements
	2.3 Collated information and materials and communicated to relevant designated persons

	2.4 Identified difficulties organising and accessing information and solve collaboratively with individuals and team members
	2.5 Updated and stored information in accordance with organisational requirements and systems
3. Review information needs	3.1 Actively seeked feedback on clarity, accuracy and sufficiency of information to ensure relevance of information and system
	3.2 Reviewed the contribution of information to decision making and implement appropriate modifications to collection processes
	3.3 Identified future information needs and incorporate modifications to collection processes
	3.4 Documented future information needs and incorporate in modifications to reporting processes

RANGE STATEMENT

Information may include:

- computer databases (e.g. library catalogue, customer records)
- computer files (e.g. letters, memos and other documents)
- correspondence (e.g. faxes, memos, letters, email)
- financial figures
- forms (e.g. insurance forms, membership forms)
- invoices (e.g. from suppliers, to debtors)
- personnel records (e.g. personal details, salary rates)
- production targets
- sales records (e.g. monthly forecasts, targets achieved)

Organisational requirements may include:

- code of conduct/code of ethics
- information protocols
- legal and organisational policies, guidelines and requirements
- management and accountability channels
- procedures for updating records
- quality assurance and/or procedures manuals
- security and confidentiality requirements

Methods of collecting information may include:

- checking research provided by others
- checking written material including referrals and client files
- classification tools
- individual research
- information from other organisations
- interviews with colleagues/customers
- observation and listening
- previous file records
- questioning (in person or indirect)
- recruitment applications and other forms

Interpersonal skills may include:

- consultation methods, techniques and protocols
- networking
- seeking feedback from group members to confirm understanding
- summarising and paraphrasing
- using appropriate body language

Format may include:

- adding headers and footers
- incorporating graphics and pictures
- inserting symbols
- using legends
- using a particular software application
- using tables and charts

Technology may include:

- answering machine
- computer
- email
- fax machine
- internet/extranet/intranet
- photocopier
- shredder
- telephone

Systems may include:

- information management systems
- knowledge management systems
- record management systems

Designated persons may include:

- clients
- colleagues
- committee
- external agencies
- line management
- statutory bodies
- supervisor

Feedback may include:

- audit documentation and reports
- comments from clients and colleagues
- customer satisfaction questionnaires
- quality assurance data
- returned goods

ASSESSMENT GUIDE

Form of assessment

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

- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
- analysis of responses to case studies and scenarios
- demonstration of techniques
- oral or written questioning to assess knowledge of organisational recordkeeping/filing systems
- analysis of how information and materials were communicated to relevant people
- review of documentation outlining future information needs.

Assessment context
Critical aspects (for assessment)

- providing accurate information for defined purposes
- systematic maintenance and handling of data and documents
- using business technology to manage information
- knowledge of relevant legislation.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• key provisions of relevant legislation from all forms of government that may affect aspects of business operations.	• analytical skills to classify and report information • literacy skills to read and understand a variety of texts; and to write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information • problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate • technology skills to display information in a format suitable to the target audience.

Unit 10

UNIT TITLE	Maintain business resources				
DESCRIPTOR	This unit describes the skills and knowledge required to determine, administer and maintain resources and equipment to complete a variety of tasks. It applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of business resources and their basic maintenance to provide technical advice and support to a team.				
CODE	SOC25S1U05V1	Level	3	Credit	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Advise on resource requirements	1.1 Calculated estimates of future and presented business resource needs in accordance with organisational requirements 1.2 Ensured advice is clear, concise and relevant to achieve organisational requirements 1.3 Provided information on the most economical and effective choice of equipment, materials and suppliers 1.4 Identified resource shortages and possible impact on operations
2. Monitor resource usage and maintenance	2.1 Ensured resource handling is in accordance with established organisational requirements including occupational health and safety requirements 2.2 Used business technology to monitor and identify the effective use of resources

	2.3 Use consultation with individuals and teams to facilitate effective decision-making on the appropriate allocation of resources
	2.4 Identified and adhered to relevant policies regarding resource use in the performance of operational tasks
	2.5 Routinely monitored and compared resource usage with estimated requirements in budget plans
3. Acquire resources	3.1 Ensured acquisition and storage of resources is in accordance with organisational requirements, is cost effective, and consistent with organisational timelines
	3.2 Acquired resources within available timelines to meet identified requirements
	3.3 Reviewed resource acquisition processes to identified improvements in future resource acquisitions

RANGE STATEMENT

Business resources may include:

- equipment
- facilities
- human resources
- raw materials
- software
- stock and supplies

Organisational requirements may include:

- access and equity principles and practice
- business and performance plans
- defined resource parameters
- ethical standards
- goals, objectives, plans, systems and processes
- legal and organisational policies, guidelines and requirements
- management and accountability channels
- manufacturer's and operational specifications
- quality and continuous improvement processes and standards
- quality assurance and/or procedures manuals
- security and confidentiality requirements

Occupational health and safety requirements may include:

- decision making delegations
- equipment uses
- first aid kit
- medical attention
- reporting requirements
- site access

Business technology may include:

- computer applications
- computers
- modems
- personal schedules
- photocopiers

Policies regarding resource use may include:

- budgeting limits
- ordering procedures
- purchasing authorities

- recruitment and personnel
- time management
- transport/travel policies

Resource acquisition processes may include:

- contracted supplier ordering
- internal approvals
- non-tendered processes

ASSESSMENT GUIDE

Form of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
- review of documentation estimating future and present business resource needs
- analysis of responses to case studies and scenarios
- demonstration of techniques
- oral or written questioning to assess knowledge of equipment maintenance procedures
- review of information provided on the most economical and effective choice of equipment, materials and suppliers
- evaluation of documentation reviewing resource acquisition processes.

Assessment context
Critical aspects (for assessment)

Evidence of the following is essential:
- collecting and recording data on resource use
- observing resource use over defined and operational timeframes
- carrying out routine maintenance
- knowledge of organisational resource acquisition policies, plans and procedures

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• key provisions of relevant legislation from all levels of government that may affect aspects of business operations	• literacy skills to read and understand organisation's policies and procedures; to write simple instructions for a particular routine task • evaluation skills to diagnose faults and to monitor resource usage • problem-solving skills to determine appropriate fault repair actions • numeracy skills to calculate resource expenditure • technology skills to select and use technology appropriate to a task.

Unit 11

UNIT TITLE	**Support the recruitment, selection and induction of staff**					
DESCRIPTOR	This unit describes the skills and knowledge required to execute tasks associated with the recruitment cycle and apply in-depth knowledge of the work of the organisation, and how recruitment and selection practices fit with other human resources functions. This unit applies to individuals who support recruitment, selection and induction functions under the direction of a human resource manager.					
CODE	SOC25S2U01V1	Level	4	Credit	8	

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Plan for recruitment	1.1 Obtained approval to fill position, clarify time lines and requirement for appointment 1.2 Assisted in preparing job descriptions that accurately reflected the role requirements, according to organisational policies and procedures, legislation, codes, national standards and work health and safety (WHS) considerations 1.3 Consulted with relevant personnel about job descriptions and workforce strategy 1.4 Assisted in ensuring that job descriptions comply with legislative requirements and reflect the organisation's requirements for a diverse workforce 1.5 Obtained approvals to advertise position
2. Plan for selection	2.1 Chose appropriate channels and technology to advertise vacancies and/or identify potential talent pool

	2.2 Advertised vacancies for staffing requirements according to organisational policies and procedures
	2.3 Consulted with relevant personnel to convene selection panel and develop interview questions
	2.4 Assisted in ensuring that interview questions comply with legislative requirements
	2.5 Assisted in short-listing applicants
	2.6 Scheduled interviews and advise relevant people of times, dates and venues
3. Support selection process	3.1 Participated in interview process and assess candidates against agreed selection criteria
	3.2 Discussed assessment with other selection panel members
	3.3 Corrected biases and deviations from agreed procedures and negotiate for preferred candidate
	3.4 Contacted referees for referee reports
	3.5 Prepared selection report and make recommendations to senior personnel for appointment
	3.6 Advised unsuccessful candidates of outcomes and respond to any queries
	3.7 Secured preferred candidate's agreement
	3.8 Completed necessary documentation according to organisational procedures, observing confidentiality and privacy requirements

4. Induct successful candidate	4.1 Provided successful candidate with employment contract and other documentation
	4.2 Advised manager and work team of new appointment
	4.3 Advised managers and staff of candidate's starting date and make necessary administrative arrangements for pay and employee record keeping
	4.4 Arranged successful candidate's induction according to organisational policy

RANGE STATEMENT

Job descriptions may include:

- attributes
- competencies required by staff
- job or person specifications
- job title and purpose of position
- necessary skills and knowledge
- required qualifications
- selection criteria
- tasks or duties associated with the position.

Policies may include:

- anti-discrimination
- diversity
- privacy and confidentiality.

Legislation, codes and national standards may include:

- award and enterprise agreements, and relevant industrial instruments
- relevant industry codes of practice

- relevant legislation from all levels of government that affects business operation

Workforce strategies may include:

- targets for specific groups to ensure workforce diversity in, for example:
- age
- ethnicity
- experience
- gender
- other forms of differences, such as learning styles, personality types, working styles, etc.
- targets for specific qualifications, capabilities or attributes
- recruiting for new strategic directions.

Channels and technology may include:

- government job search agencies
- industry-specific websites and journals
- internal communications, such as newsletters, intranet and emails
- newspaper advertisements
- recruitment agencies
- recruitment websites
- social media sites.

Staffing requirements may include:

- casual, permanent or temporary
- full-time or part-time.

Induction may include:

- initial orientation of new employee
- initial training of new employee to meet the requirements of the position.

ASSESSMENT GUIDE

Form of assessment

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

- analysis of responses to case studies and scenarios
- assessment of reports on recruitment and selection
- demonstration of selection techniques
- direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
- observation of interviewing techniques
- review of job description and advertisements for staffing vacancies
- review of documentation provided to successful candidate
- oral or written questioning to assess knowledge of selection processes.

Assessment context
Critical aspects (for assessment)

Evidence of the ability to:

- work with job descriptions to support sourcing, selecting and appointing suitable staff
- participate in interviews and other selection techniques
- use different advertising channels to promote vacancies and/or establish a potential talent pool

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• documentation required for recruitment, selection and induction • human resources functions, human resources life cycle and the place of recruitment and selection in that life cycle • principles of equity and diversity and relevant legislation • range of interviewing techniques and other selection processes and their application.	• Communication skills to use networks to source suitable applicants • literacy skills to work with job descriptions to devise suitable questions for interviews • organising and scheduling skills to arrange interviews and venues • technology skills maintain information in the human resources information system.

Unit 12

UNIT TITLE	**Supervise an established records system to ensure its integrity**				
DESCRIPTOR	This Unit covers supervising the creation of new files, the maintenance of the enterprise's system, including the security of confidential files and training new and existing staff in using the filing system. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U02V1	**LEVEL**	4	**CREDIT**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Maintain existing filing arrangements	1.1 New documents are allocated to their designated category 1.2 Issue and return of documents is monitored to ensure the integrity of the system is maintained 1.3 Documents are archived/removed/updated to ensure that maximum space is available to house current records
2. Ensure distribution of files and records	2.1 Required files are correctly identified and located 2.2 Files are dispatched to the nominated person or section within designated timelines 2.3 File and document movements are monitored and recorded 2.4 Documents are maintained in good condition and in correct location

3. Maintain security of filing system	3.1 Confidential files are kept separate from general files 3.2 Confidential files are only accessed by nominated Persons 3.3 Security system is monitored to ensure issued files are traceable at all times
4. Train staff in records management	4.1 Staff training needs are determined 4.2 Training is provided for new staff in records system 4.3 Retraining for existing staff organized if necessary

Range Statement

Allocating new documents to their designated category may include:
- creating new files
- appropriately naming new files
- correctly labelling or coding new files
- cross-referencing files
- registering new files before filing
- indexing and recording new files before filing

Designated categories may include:
- financial
- project categories
- legal
- administrative
- sales and marketing
- historical or archived

Monitoring the issue of documents may involve:
- creating/maintaining a paper–based file register
- creating/maintaining a file database
- creating/maintaining a card index system
- passing slips

Records which need to be archived/removed/updated may include:
- inactive files
- closed files
  - kept for legal/reporting purposes
  - kept for research/historical purpose
  - to be destroyed

- documents which are too large to be workable in their current state

out of date files (e.g. stock, account and sales records, out of date client address and information details, out of date policy, procedures, regulations or legislation records).

Confidential files may be:
- client records
- personnel details (salary details, personal information)
- job application records and reports
- product development records
- legal matters and contracts
- enterprises financial details

Retraining for existing staff may involve:
- informing staff of revisions/updates
- reminding staff of the system requirements and their responsibilities
- providing updates at staff meetings
- sending memos with updated or refresher information on the records management systems
- holding workshops or information sessions on the records management systems

ASSESSMENT GUIDE

Form of assessment
- Direct Observation
- Oral interview and written test

Assessment context

Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play

- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents third party reports

Critical aspects
- enterprise's policies and procedures are understood and followed
- a detailed understanding of the enterprise records management system is demonstrated and is clearly communicated to others
- requested files are retrieved and distributed to the appropriate person within designated timelines
- movement of files is monitored and recorded to maintain the integrity of the system
- census or inventory is conducted at regular intervals to establish the actual location and condition of all files
- files are returned to their correct location and sequence
- files are maintained in good condition
- ensures that other people are familiar with the policies and procedures governing the records system
- restricted confidential files are identified
- restricted confidential files are tagged to indicate restricted confidential status using a security rating system and are secured in separate storage arrangements
- restricted confidential files are only distributed to authorised personnel
- restricted confidential files are locked when not in immediate use and keys are kept securely in safe location
- new staff are informed about the records management system and its operation is demonstrated retraining for existing staff is organised if necessary

Assessment conditions

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- workplace manuals and reference materials such as company policy, procedural manuals, records. system, user guide
- filing system

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• application of enterprise policies and procedures	• literacy: follows and interprets enterprise procedures and policies; reads and critically evaluates texts;

required across the full range of tasks covered • enterprise'srecords management system • common records management process • confidentiality in relation to records management	• has developed written skills; extracts main ideas from files for accurate recording; employs a variety of strategies when interpreting text e.g. creates questions, checks for accuracy of information; considers aspects of context and purpose • numeracy: codes and classifies documents numerically • research: selects categories by which to organise information; processes information in a systematic way; evaluates existing systems and identifies methods for improvement according to agreed principles (numbers, company directory, destination); summarises data appropriately, • technology: uses appropriate technological materials in order to establish and maintain filing system • problem solving: uses a variety of processes appropriately and flexibly; tracks and locates lost/misplaced files; decides where cross-checking of information is appropriate • communication: participates in sustained oral interactions with staff; questions to clarify information; - briefs and informs staff of procedures; modifies language to suit a range of audiences • organises and delivers staff training as appropriate • organisational: monitors systems, prepares and delivers training

Unit 13

UNIT TITLE	**Organize and provide information in response to requests**				
DESCRIPTOR	This Unit covers finding and providing information in response to a request so that the client's needs are met. This may involve combining and analysing information from a number of sources before composing a report for the client. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U03V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Process a request for information	1.1 Request is documented using the appropriate recording system 1.2 Appropriate response methods are identified
2. Identify information source(s)	2.1 Various sources and locations of information are identified 2.2 Access to identified sources is obtained
3. Extract information	3.1 Information relevant to the particular request is located and extracted 3.2 Where requested information is not readily available, options and alternatives are sought 3.3 Where requested information is not disclosable, appropriate alternative information is sought 3.4 Copy of extracted information is made to maintain security and confidentiality of contents/information
4. Provide information	4.1 Information is analyzed and edited to fit client's needs 4.2 Different types of information are combined to provide a response to a client's request
5. Compose report/correspondence	5.1 Relevant information is collated and edited to reflect the specific needs of the original request 5.2 Text is written using clear and concise language

	5.3 Spelling, punctuation and grammar are correct
	5.4 Report is self-checked for accuracy
	5.5 Ensure that intended meaning of report/correspondence is readily understood by recipient
	5.6 Report is drafted using the designated layout
	5.7 Edited report is produced and dispatched to the nominated person/section
	5.8 Framework is established and maintained for others to use in composing future texts
	5.9 Final report is copied and filed to ensure security and confidentiality of contents

Range Statement

Appropriate recording system may include:

- paper-based record
- computer based record
- ensuring the request is properly documented in terms of:
- purpose
- content
- required format
- required level of detail
- layout
- date of request
- intended audience
- deadline for completion
- customer database
- customer feedback form

Appropriate response methods may include**:**
- type of correspondence (e.g. letter, report, email, facsimile)
- information packs
- verbal presentation

Sources and locations of information may include**:**
- brochures, pamphlets and other promotional material
- paper-based or computer-based files
- other people within the organization
- organizational reports

- journals, magazines, papers and periodicals
- government departments or agencies
- representative associations (e.g. employer bodies, unions, professional associations)
- other organizations
- libraries the Internet

Obtaining access may include:
- following organizational policies and procedures
- approaching appropriate staff within the organization
- observing copyright laws recording items taken

Locating and extracting information may include:
- retrieving promotional material from enterprise store/stock
- downloading information from the computer system
- copying materials
- recording m a t e r i a l s /discussions
- taking notes
- borrowing materials purchasing materials

Options and alternatives may include:
- redefining the boundaries of the research
- a follow-up report when the information is available keeping clients informed

Appropriate alternative information may include:
- providing an outline of the issues/points/facts (without disclosing any confidential information)
- providing copies of material which is temporarily unavailable

Editing to fit client's needs may include:
- confirming the original purpose of the information and intended audience
- clarifying that the information collected is relevant, valid, accurate and reliable
- drawing the material together in a clear and concise manner in response to the client's request

Different types of information may include:
- primary sources
- secondary sources

Clear and concise language may include:

- using plain English/Dhivehi
- short sentences and short paragraphs
- removing redundant expressions
- avoiding clichés and jargon

Correct spelling, punctuation and grammar may include:
- using a dictionary/thesaurus
- requesting feedback regarding accuracy

Self-checking may include:

- checking spelling, grammar and punctuation
- checking continuity
- checking factual information for accuracy
- checking for clarity of presentation and lack of repetition

Ensuring intended meaning of report/correspondence is understood may include:

- checking for clarity of expression
- using plain English/Dhivehi
- ensuring the main purpose is clearly stated
- being consistent in format and writing style

Designated layout may include:
- using a style and format specified by the organization

Nominated person/ section may include:
- supervisor
- client
- regulatory body
- external enterprise

Establishing framework for future texts may include:
- keeping a copy of the report on file (paper or electronic) to be used as a guide for future requests for information
- developing template
- developing style guides

ASSESSMENT GUIDE

Form of assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as company policy, procedural manuals, records

  system, user guide, style manuals
- Information sources including books, reports, files, journals etc.
- filing system
- computer equipment including relevant software sample reports/correspondence

Assessment context

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the -job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Critical aspects (for assessment)

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning Knowledge	Underpinning Skills
• application of enterprise policies and procedures required across the full range of tasks covered • copyright legislation • enterprise style guides/manuals • report/correspondence styles and templates • relevant primary and secondary information sources • intended audience • confidentiality and security procedures	• literacy: follows and interprets enterprise policies and procedures; elicits and sources correct information; checks and validates information with peers/teacher/external sources; makes notes from spoken and written texts in chosen fields of knowledge; • sequences writing with attention to organizing principles of time, importance or other workplace relevant system; uses vocabulary and grammar appropriate to register and to create nuances of meaning • research: identifies and locates source for information; collates, edits and analyses information and uses relevant data to draft a report; considers aspects of context, purpose and audience when comprehending or generating texts; uses a variety of strategies for planning, reviewing and proofreading own writing; uses academic classification systems to complete research task, eg. inserts footnotes and bibliography • communication: listens and questions to clarify information; participates effectively in spoken interactions by using strategies to confirm, clarify or repair understanding

	• problem solving: identifies gaps in information and gathers necessary information from external sources; selects alternative methods to locate information; • letter and report writing skills • numeracy: records and files data; adheres to designated deadlines

Unit 14

UNIT TITLE	**Provide advice in order to meet current and anticipated client requirements**				
DESCRIPTOR	This Unit covers identifying clients' requirements, providing advice to clients and ensuring client service procedures and resources are adequate. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U04V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Identify current client requirements	1.1 Clients are identified and differentiated 1.2 Needs and expectations of clients are understood and assessed 1.3 Options to meet identified needs are developed
2. Provide information on current service provision and resource allocation within area of responsibility	2.1 Client services are monitored to ensure good service is maintained 2.2 Current resource allocation for client services is monitored 2.3 Regular reports on client services are prepared and presented to the *nominated person*
3. Identify trends in client requirements	3.1 Changes to client requirements are analyzed 3.2 Trends are identified 3.3 Options for upgrading resources are explored 3.4 Options to improve client services are explored 3.5 Effectiveness of advice/outcome/service is evaluated and reported upon

Range Statement

Types of clients may include:
- internal (e.g. colleagues, board members, contractors)
- external (e.g. suppliers, general public, government agencies, other businesses)

Differentiating clients may include:
- identifying separate client groups
- defining clients into broad classes or groups

Factors which are used to differentiate clients may include:
- geographic (regional, city/rural, state/territory, climate)
- demographic (age, gender, family type and size, income, occupation, educational status, religion)
- psychosocial (class, status, lifestyle, personality)
- behavioural (loyalty to particular brands, usage rates, attitudes to product/services)
- product/service utilized
- length of associate with enterprise

Understanding client expectations and needs may include:
- knowing the enterprise's products/services (e.g. features, benefits)
- monitoring client feedback/response (e.g. surveys, focus groups, direct contact with clients)
- effectively communicating between the enterprise and its clients

Assessing client expectations and needs may include:
- examining client data
- monitoring data for upward and downward trends
- identifying patterns in client feedback
- determining ability of enterprise to meet identified client needs

Developing options may include:
- increasing client contact
- identifying new products/services
- improving product/service information disseminated to clients
- increasing client contact
- refund policy
- delivery policy

Identifying/anticipating problems may include:
- preparing for seasonal occurrences
- introduction of a new product/service
- modification of payment requirements/prices

Monitoring client services may include:

- monitoring client response
- surveys, focus groups, direct client contact
- speaking with suppliers, sales and service personnel in regular contact with the clients

Maintaining good service may include:
- ensuring staff proficiency in areas of responsibility
- ensuring advice and communication with clients is handled appropriately
- addressing service problems quickly and carefully
- direct contact with clients to maintain the relationship
- intervention by a higher authority from within the enterprise

Monitoring current resource allocation may involve:
- monitoring the volume of business transacted (eg. number of phone calls, appointments, items of information sent to clients)
- ensuring an effective monitoring system (eg. electronic database to record client service
- provision)
- recording customer service activities
- ensuring adequate staffing to effectively provide customer service

Reports on client services may include:
- activity reports
- information resources and information to clients
- information on feedback from clients
- recommendation for changes

The nominated person may include:
- the supervisor or manager
- head of the department
- team leader
- clients

Client requirements/changes may include:
- product/service delivery, packing preferences
- price sensitivity
- product/service   enhancement/obsolescence
- value added product/service

Identifying trends may include:
- weaknesses (eg. customer dissatisfaction, loss of profit)
- strengths (eg. financial gain, customer satisfaction)
- opportunities (eg. market niche)

Options for upgrading resources may include:
- updating and revising promotional resources produced for clients
- developing new resources

- developing a new format or 'look' for resources
- providing additional staff for busy periods

Options to improve client services may include:
- client service improvement strategies (specific, general)
- evaluating and acting on client feedback
- brainstorming new ideas and solutions

Evaluating advice/outcome/service may include:
- monitoring implementation
- eliciting client feedback
- tracking outcomes
- testing results

Reporting on advice/outcome/service may include:
- oral presentation
- team/staff meeting
- written report (for internal/external purposes)

ASSESSMENT GUIDE
Forms of assessment
Competency may be assessed through:

- Portfolio Assessment
- Interview
- Simulation/Role-plays
- Observation
- Third Party Reports
- Exams and Tests

Assessment context
Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Critical aspects (for assessment)
- clients are accurately identified
- different client needs are identified
- range of products and/or services offered in the market are identified and understood
- key functions, products and services of enterprise are identified and are communicated clearly
- client expectations are understood
- options to address changing client needs are identified
- proposed options are appropriate and match client needs
- problems are identified and/or anticipated
- client needs and satisfaction are monitored according to enterprise policies and procedures
- information produced for clients is monitored and is accurate, up to date and accessible
- analysis of client needs relating to own area of responsibility is prepared regularly and presented to nominated person
- trends and changes in client requirements and expectations are identified and communicated regularly
- options for improving resources and client services are explored

.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills

• enterprise policies and procedures • key functions, products and services of enterprise • client base • client trends • client needs	• literacy: follows enterprise policies and procedures; understands clients' requests and extracts relevant • information; checks and validates information with peers/teacher/external sources; makes notes from spoken and written texts in chosen fields of knowledge; uses vocabulary and grammar appropriate to register and to create nuances of meaning • communication: communicates a range of ideas; participates effectively in sustained spoken interactions with team members and supervisors; listens and questions to clarify information and makes constructive additions; • problem solving: identifies gaps in information and gathers necessary information from external • sources; selects alternative methods to locate information; compares results to anticipated outcomes to confirm results • letter and report writing: identifies and locates source for information; collates, edits and analyses information and uses relevant data to draft a report; considers aspects of context, purpose and • audience when comprehending or generating texts; uses a variety of strategies for planning, reviewing and proofreading own writing

	• numeracy: records and files data; estimates time and plans accurately; prioritises clients' requests; • demonstrates knowledge of mathematical concepts and financial formulae; interprets and uses graphical representation as the basis for inference and prediction. • teamwork: consults with team members and supervisors; negotiates targets with teams

Unit 15

UNIT TITLE	**Apply knowledge of employee's and employer's rights and responsibilities to workplace environment**				
DESCRIPTOR	This Unit covers the acquisition of knowledge of an employees and employer's rights and responsibilities. It also addresses issues such as career planning and constructing resumes. This unit can be assessed alone or in combination with other units making up a job role				
CODE	SOC25S2U05V1	**Level**	4	**Credit**	10

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Identify workplace rights and responsibilities of employees and employers	1.1 Rights and responsibilities of employees and employers are identified and outlined clearly 1.2 Self and other's behaviors which contribute to a cooperative team and a safe work environment are identified and practiced 1.3 Workplace procedures for upholding employee and employer rights and responsibilities are followed wherever necessary within the scope of responsibilities and competencies
2. Identify areas in which discrimination can occur in the workplace	2.1 Information relating to anti-discrimination is collected, key points are identified and understood 2.2 Avenues for reporting and responding to discrimination are identified and procedures are outlined clearly 2.3 Avenues for resolving disputes within the workplace are identified and procedures for implementing dispute resolutions are outlined clearly
3. Prepare documentation covering workplace terms and conditions	3.1 Documents outlining workplace working conditions are located, summarized and any uncertainties are clarified with appropriate personnel 3.2 Different terms under which persons can be employed are identified and understood

	3.3 Information from relevant employer and employee support organizations is obtained and key points are identified and understood
4. Prepare for change and career advancement in the workplace	4.1 Any changes to workplace work environment are identified and training is sought where necessary 4.2 Current skills are identified and skills are matched to relevant careers 4.3 Additional skills required to achieve career advancement are identified 4.4 Options for attaining additional skills are identified and pursued where appropriate 4.5 Up-to-date resume is prepared and produced

Range Statement

Rights and responsibilities of employees may relate to:
- attendance
- punctuality
- obeying lawful orders
- confidentiality and privacy of enterprise, client and colleague's information
- knowing the terms and conditions of own employment
- the right to union representation
- protection from discrimination and sexual harassment

Rights and responsibilities of employers include:
- commit a criminal offence
- are negligent, careless or cause an accident
- commit acts of disloyalty such as revealing confidential information
- responsibility of providing a safe environment free from discrimination and sexual harassment (see relevant State and Commonwealth anti-discrimination legislation)

Behaviors which contribute to a cooperative team environment may include:
- discussing and negotiating problems and tasks with other team members
- solving problems as a team
- sharing your knowledge and skills
- listening to the ideas and opinions of others in your team

A firm's working conditions may cover:
- hours of work per week
- work overload
- expected starting and finishing times
- overtime conditions
- unpaid overtime
- recreation leaves
- sick leave
- professional development
- public holidays
- long service leave
- use of protective clothing

Different terms under which a person can be employed may include:
- Awards
- Certified Agreements
- Maldivian Workplace Agreements
- contracts

Support organizations may include:
- Employer Associations
- Professional Associations

Changes to workplace environment may include:
- change to software and hardware
- changes to workplace equipment, machinery
- changes to office fit out

Career information may be obtained from:
- libraries and local community centers
- Registered Training Organizations
- Internet
- network of friends
- newspapers

Avenues for attaining additional skills may include:
- on-the-job training
- taking on additional responsibilities in the workplace
- completing short courses
- volunteer work

ASSESSMENT GUIDE
Forms of assessment
Competency may be assessed through:

- Portfolio Assessment
- Interview
- Simulation/Role-plays
- Observation
- Third Party Reports
- Exams and Tests

Assessment context
Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- simulation
- role-play
- projects/assignments
- third party reports

Critical aspects (for assessment)

- a firm's policies and procedures are understood and followed
- evidence of understanding of own and others workplace roles and responsibilities is demonstrated and can be clearly explained
- behaviors which contribute to a cooperative and safe work environment can be identified and clearly explained
- workplace procedures for upholding employee and employer rights and responsibilities can be identified and clearly explained

- key points in anti-discrimination documents are identified including grounds on which it is
- illegal to discriminate, terms on which it is illegal to discriminate and avenues for reporting and responding to discrimination
- avenues and procedures for reporting, responding to and resolving discrimination and harassment can be identified
- areas in which it is illegal to discriminate against a person are identified, including identification of how discrimination in the workplace can manifest itself
- information on terms and conditions of employment is gathered and an understanding of its contents is demonstrated
- initiative is taken regarding further training, including self-education and investigating formal courses available
- skills maps match up current skills with appropriate jobs and identifies additional skills required for career advancement
- candidate's resume is formatted and structured appropriately (i.e. chronological or skills based)

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• roles and responsibilities of internal and relevant external individuals/authorities	• literacy: follows workplace procedures; follows simple written and verbal instructions; writes summaries and prepares resumes • research: locates relevant documents regarding workplace conditions and summaries for own and other's information • problem solving: identifies avenues for resolving discrimination and disputes; analyses current personal skills; identifies skill gaps and scope for training; identifies possible career opportunities • communication: listens to short, explicit instructions to learn new procedures; explains routine procedures to others; participates in

	workplace meetings by listening for specific information and contributing as appropriate; participates in informal conversations; clarifies when necessary using simple questioning techniques and asks for assistance
	• team work: understands team's goals; communicates ideas, information and opinions to the group

Unit 16

UNIT TITLE	**Plan meetings to enable the stated objectives of the meetings to be met**

DESCRIPTOR	This Unit covers organising meetings, for example agendas, papers, participants and minutes within timelines.				
	This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U06V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Make meeting arrangements	1.1 Requirements of meeting and participants are identified 1.2 Meeting arrangements are prepared in accordance with requirements of meeting 1.3 Participants are advised of any changes to original meeting details
2. Prepare documentation for meetings	2.1 Agenda and relevant material is identified and prepared for dispatch 2.2 Documentation is checked for accuracy and any errors are corrected 2.3 Documentation is dispatched to participants within designated timelines
3. Record and produce minutes of meeting	3.1 Notes are taken to ensure an accurate record of the meeting 3.2 Minutes are produced 3.3 Minutes reflect a true and accurate account of the meeting 3.4 Minutes are checked for accuracy and approved by the nominated person 3.5 Copies of minutes are dispatched to the nominated persons within designated timelines

Range Statement

Enterprise policies and procedures may relate to:
- meeting arrangements
- agenda formats
- minute-taking
- meeting technology
- meeting locations
- catering and other requirements

Type of meeting may include:
- teleconferencing
- videoconferencing
- annual general meeting
- board meeting
    - .1 formal
    - .2 informal
- semi-formal
- staff meeting

The requirements of the meeting and its participants may relate to:
- purpose of the meeting
- meeting structure
- number of participants
- special needs of participants
- specific resources and equipment required by participants

Participants may include:
- internal clients (individuals, teams, consultants, committees)
- external clients (customers, business contacts, persons working in a similar field)
- a mixture of both

Meeting arrangements may include:
- scheduling the date and time for the meeting
- booking an appropriate venue
- organizing catering
- organizing accommodation and transport
- organizing appropriate communication technology
- establishing costs and operating within a budget
- preparing relevant documentation for participants

Participants being advised of changes may include:
- letter
- fax
- email
- telephone
- office memo
- face to face conversation

Agenda may include:
- statement of the meeting's purpose
- date, time and location of meeting
- welcome
- minutes of the previous meeting
- matters or business arising from the minutes
- correspondence
- reports
- major agenda items
- general business
- date of next meeting

Relevant material may relate to:
- financial reports
- chairperson's report
- research reports
- itemized meeting papers
- draft documentation
- correspondence

Dispatch may include:
- post
- Express Post
- courier
- registered mail
- email

Designated timelines may relate to:
- formal timeframe set by the enterprise
- informal timeframe set by the administrative organizer
- timeframe agreed by the participants

Notes may relate to:
- participants who were present at or absent from the meeting (attendees and apologies)
- points discussed at the meeting
- suggestions made at the meeting
- issues raised at the meeting
- decisions taken at the meeting
- future action

Preparing minutes may include:
- reading previous minutes to ascertain the appropriate format
- using enterprise templates
- meeting details (eg. title, date, time, location)
- welcome
- names of absent and attending participants
- apologies sent by those absent
- approval of the record of the previous minutes
- matters arising from the previous meetings
- correspondence
- agenda items
- reports
- other business
- date of the next meeting
- lists rather than complete sentences

Nominated persons may include:
- meeting participants, both attending and absent
- internal clients (e.g. management, relevant departments, committees
- external clients (e.g. interested customers, relevant consultants, key stakeholders)

ASSESSMENT GUIDE
Forms of assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- reference material in regard to meeting venues, catering companies, transport suppliers
- names and contacts for meeting participants
- office supplies and equipment

- equipment (e.g. computer and software, meeting technology)

Assessment context

 Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

 Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Critical aspects (for assessment)

- enterprise policies and procedures in regard to meetings are understood and followed
- purpose of a meeting is clarified and understood before preparation
- style and structure of the meeting is appropriate to the meeting's purpose
- common meeting terms are understood
- sufficient time is allowed to make the necessary meeting arrangements
- all key participants are consulted when a meeting is scheduled
- meeting requirements are clarified and confirmed within timelines
- participants are notified as soon as possible of any changes in meeting arrangements
- enterprise policies and procedures in regard to meeting documents are understood and followed
- relevant meeting papers are checked for accuracy and presented in agenda order
- participants are supplied in advance with all necessary documentation
- a spare set of meeting documents is prepared
- the agenda is clarified with key participants

- a draft agenda is prepared when required and sent in advance to participants
- efficient methods of dispatch are utilized
- a checklist is used to confirm meeting details
- enterprise policies and procedures in regard to minute-taking are understood
- minute-taking, including listing key points, suggestions and decisions, is clearly understood
- minutes are presented to nominated person for approval
- minutes are sent to all participants within designated timelines

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
• enterprise procedures and policies in regard to meetings, agendas and minute-taking • meeting terminology • meeting structures • meeting arrangements • the minute-taking format • the agenda format • the subject matter of meetings	• literacy: interprets enterprise's goals for the team; writes clear and detailed instructions, organized sequentially for group members to complete specific activities; writes and compiles relevant agenda items and records minutes; makes notes from spoken texts in meetings; uses a variety of changes strategies for planning, reviewing and proofreading documentation • communication: co-ordinates and consults with participants; orally presents written report with a • number of defined sections; listens and responds constructively to the team; defines and monitors objectives to be achieved taking into account different perspectives; clarifies points made in meetings • research: selects categories by which to organize information and assesses information for relevance, accuracy • time-management: allows sufficient time to prepare for and conduct meetings

Unit 17

UNIT TITLE	**Produce complex documents**				
DESCRIPTOR	This Unit covers using either a range of advanced functions within at least one software package, or integrating functions from at least two software packages, to produce complex documents. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U07V1	**Level**	4	**Credit**	10

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Establish document design and structure	1.1 Requirements of the task are identified 1.2 Software appropriate to the task is selected 1.3 Document design and structure is suitable for the information provided 1.4 Document design and structure meets enterprise requirements
2. Develop template or macros for document design	2.1 Templates and macros are developed and used to ensure consistency of design and layout 2.2 Amendments to templates and macros are made as required
3. Produce documents	3.1 Data is entered and edited accurately 3.2 A range of advanced functions is used to ensure the accurate completion of the task within the designated timelines 3.3 Information from other computer files and/or printed documents is inserted as required 3.4 Documents are checked for spelling, grammar and numeric data 3.5 Documents are proofread for accuracy of contents 3.6 Documents are proofread for consistency of layout and style 3.7 Modifications are made to meet required specifications 3.8 Documents are presented to the nominated person/section for approval prior to completion and/or final printing where necessary 3.9 Documents are printed as required
4. Save file and exit system	4.1 Document is saved and stored in appropriate directory or folder 4.2 File is closed and applications programs are exited without loss of data 4.3 Backup copies of files are made in accordance with specified procedures if required

	4.4 Disks/data are filed and stored in accordance with enterprise procedures

Range Statement

Complex documents may include:
- letter, memo, fax
- promotional material
- newsletter
- flyer and brochure
- report
- form
- tables

Selecting appropriate software may include:
- word processing
- spreadsheet
- database
- page layout
- graphics
- presentation

Suitable document design and structure may include:
- white space
- typeface
- graphics
- photographs
- boxes
- color
- page layout
- columns
- letter and memo conventions

Enterprise requirements may include:
- established guidelines and procedures for document production
- content
- use of logos
- templates

Templates and macros may include:
- headers and footers
- columns
- font and paragraph formatting
- page layout attributes
- performing calculations or conversions

- automatically opening documents
- rearranging menus
- assigning options to a key or toolbar button

Consistency of design and layout may include:
- indentations
- spacing's
- page numbers
- typeface styles
- captions
- bullet/ number lists
- index
- footnotes/endnotes
- references
- consistency with other enterprise documents

Entered and edited accurately may include:
- proofreading
- comparing with original data
- correct spelling, punctuation and grammar
- checked by work colleague
- approved by supervisor

Advanced functions may include:
- creating AutoText
- templates
- macros
- tables of contents
- index
- newspaper columns
- glossaries
- scanning
- colour printing
- importing data

Within designated timelines may include:
- deadline agreed with supervisor
- enterprise deadline
- deadline agreed with person requiring document

Inserting information may include:
- importing graphics
- importing tables, graphs and charts from spreadsheets
- scanning photographs and logos
- quotes
- references

- observing copyright legislation
- importing database details

Checking spelling, grammar and numeric data may include:
- using plain English
- using technical vocabulary
- using dictionary and thesaurus
- checking by others, eg. work colleague
- using of calculator

Proofreading for accuracy of contents may include:
- checking intended meaning is clear
- checking logical arrangement of ideas
- checking against original data

Proofreading for consistency of layout and style may include:
- balancing text, artwork and white space
- use of typefaces
- use of different sizes and styles to distinguish between heading levels
- margins
- indentations and spacing

Nominated person/section for approval may include:
- supervisor
- marketing department
- publications department
- legal officer
- manager

Printing documents may include:
- deciding number of copies required
- deciding type of presentation required
- single-sided or double-sided document
- paper source for printer
- paper size and orientation
- colour printing
- outsourcing
- estimating costs

Saving and storing document may include:
- considering file format and version
- assigning appropriate file names
- knowing location of related files
- backup files
- storing electronic and hard copies securely

Without loss of data may include:
- saving document regularly
- ensuring confidentiality and security of files
- file backup

Specified procedures may include:
- regularity of backup
- file maintenance
- keeping original copies

ASSESSMENT GUIDE
Forms of assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace references such as computer user manuals, enterprise policies and procedures and workplace procedural manuals
- computer equipment including relevant software, printer

Assessment context

Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Critical aspects:
1. purposes of different types of documents are identified
2. requirements of the task are identified and clarified if necessary
3. functions of a range of software are understood and appropriate software for the task is selected
4. design choices are made which improve the presentation and readability of the document
5. document design is suitable for the task and meets enterprise requirements
6. templates and macros are developed and existing templates and macros are amended if necessary
7. data and information from other sources is transferred to document accurately
8. document is edited correctly
9. task is completed within designated timelines
10. document is self-checked and all spelling, grammar and punctuation is correct
11. document is proofread and amended so that layout is consistent and content is accurate
12. document is presented to appropriate person for progress checks and for final approval if necessary
13. document is printed using appropriate printing method and material
14. enterprise policies and procedures regarding occupational health and safety are identified and followed and factors that contribute to a safe and healthy workstation are recognized

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
- the advanced functions of a range of software applications - the impact of formatting and design on the presentation and readability of documents - enterprise policies and procedures	literacy: interprets and evaluates the purposes and objectives of various uses of technology; considers aspects of context, purpose and audience when generating and formatting texts; displays logical organization of written information through the use of coherently linked paragraphs; uses a variety of strategies for planning and reviewing own work;

	demonstrates drafting techniques; uses simple and complex syntactic structures; selects vocabulary to create nuances of meaning in particular contexts • proofreading and editing: ensures clarity of meaning and conformity to enterprise requirements; checks for accuracy and consistency of information by consulting additional resources • problem solving: uses processes flexibly and interchangeably • numeracy: collates and presents data; graphs and annotated references • communication: follows complex oral instructions when using new technology; listens to and interprets complex sequenced instructions • keyboarding: uses a range of advanced functions of software applications

Unit 18

UNIT TITLE	Identify and use new and existing technology to meet the needs of the enterprise				
DESCRIPTOR	This Unit covers keeping up to date with hardware and software developments in order to make recommendations about maximizing the performance of the enterprise. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U08V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Maintain current knowledge of developments in information technology	1.1 Information is sought and located 1.2 Information on new technology is documented and filed
2. Identify new technology to assist the enterprise to meet its goals	2.1 New technologies are identified which can assist the enterprise meet its goals 2.2 Recommendations are made to the nominated person about the application of new technologies
3. Use new technology to solve problems	3.1 Training is undertaken to ensure knowledge and skill in new technologies 3.2 New technology knowledge and skills are applied in the workplace

Range Statement

Information sources may include:
- suppliers of hardware and software
- industry associations
- seminars, workshops and training sessions
- the Internet
- computer magazines and journals
- trade fairs
- computer software designers
- computer hardware manufacturers
- libraries

- internal/external clients

Documenting and filing information may include:
- making notes
- dating and filing material found
- summarizing and evaluating information

Identifying and recommending new technologies may include:
- providing briefings to management and work colleagues
- incorporating relevant material in reports on technology needs
- informal discussions with internal clients
- formal brainstorming
- formal survey of colleagues
- consultation with appropriate departments
- clear understanding of enterprise's business plan, goals and direction
- determining appropriate technologies
- compatibility with technology used in other areas of enterprise
- documenting comparisons of similar technologies
- establishing costs
- budget available
- establishing benefits and consequences
- timeline for delivery and installation
- maintenance required
- enterprise's policies and procedures for purchasing equipment
- clear and concise reports/and or presentations of findings

Nominated person may include:
- supervisor
- IT manager
- office manager
- purchasing department
- team leader

Training may include:
- supplier or manufacturer providing training as part of its service
- enterprise offering internal training
- specialist training from external sources
- self-learning from user guides and training manuals

Application of knowledge and skills in the workplace may relate to:
- degree of utilization of new technology

- effective utilization of new technology
- degree to which requirements of enterprise are being fulfilled
- review of effectiveness

ASSESSMENT GUIDE

Forms of assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- a range of office technology
- workplace reference materials such as company policy and procedural manual
- opportunities to conduct research

Assessment context

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas
- where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents third party reports

Critical aspects (for assessment)

- enterprise's business plan, goals and directions are understood and long and short-term technology requirements are identified

- enterprise's use of a range of technology is identified
- relevant information regarding new technology is sought and located
- information on new technology is gathered, documented and communicated to the appropriate person
- information is filed according to enterprise policies and procedures for future use
- new technologies which match the needs of the enterprise are identified
- implementation process is considered when identifying new technologies
- budget implications are discussed with the appropriate person
- costs of recommendations for upgrading or purchasing equipment are calculated
- implications of upgrading or purchasing equipment are considered
- clear, concise and correct report is produced documenting findings and recommendations for implementing new technology and presented to appropriate person
- style and content of report is appropriate for the task and enterprise requirements
- further communication is undertaken if necessary
- training is undertaken to ensure knowledge and skill in new areas according to enterprise policies and procedures
- knowledge and skills acquired during training are applied effectively in the workplace

Assessment conditions

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills

• enterprise technology uses and needs • enterprise business plans, goals and directions • roles and responsibilities of enterprise personnel/departments • report writing including styles • preparing budget and cost analysis • preventative maintenance • implications of activities	• literacy: reads and interprets complex technological procedures • research and analysis; identifies, collects and analyses relevant information in accordance with a firm's technological needs; compares a new work or technological practice/option with previous experiences; • report writing: draws together information gathered from a range of sources, then summarises data in • a logically coherent report • problem solving: identifies the best course of action to update systems to reflect workplace practices • communication: follows complex instructions presented orally when using new technology; communicates ideas, arguments and conclusions logically; responds to a complex enquiry or complaint; gives complex instructions, including pitfalls to be avoided when training others to use • machinery literacy • numeracy: understands computer configurations; understands budget implications • use of technology in order to maximise use of software • keyboarding • interpersonal and team work: consults and negotiates with team regarding new procedures

Unit 19

UNIT TITLE	**Plan business trip and associated itinerary to ensure efficient travel**				
DESCRIPTOR	This Unit covers organising someone else's travel arrangements, for example meetings, documents, and itinerary, within timelines. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U09V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Organize business itinerary	1.1 Purpose of travel is clarified 1.2 Meeting details are identified 1.3 Arrangements for meetings are made and confirmed 1.4 Daily itinerary details are recorded 1.5 Relevant documents and support material for meetings are sourced and prepared within designated timelines 1.6 Points of contact and names of contact persons are identified 1.7 Relevant documents are dispatched to the traveler within designated timelines
2. Identify credit facilities	2.1 Methods of payment are checked and confirmed 2.2 Credit transfers, currency and traveler's cheques are arranged

Range Statement

Enterprise policies and procedures relating to travel arrangements may involve:
- operational guidelines to be followed
- names of personnel authorized to approve travel and travel expenditure
- classes of travel and accommodation
- documentation to be completed by the traveler
- type and level of reimbursements for travel expenditure
- names of preferred suppliers
- accounts procedures
- the appropriate individual or department that authorizes travel
- purchase orders
- the financial arrangements established by the enterprise for business trips

Purpose of travel may include**:**
- visits to branch offices
- attendance at conferences or seminars
- marketing of products and/or services
- project
- client liaison

Meeting details may include:
- length
- date
- time
- attendees
- location
- travel time to location
- parking
- preparing necessary documentation and resources
- contact/client details

Daily itinerary details may involve:
- arrival and departure times
- transport arrangements
- accommodation details
- arrangements for meals
- confirmed appointment details
- required documentation for each appointment
- contact names and numbers of all personnel involved
- suggested leisure activities

Recording may involve:
- establishing an individual travel file for each key aspect of the trip
- using a prepared checklist
- using the enterprise's standard checklist
- using a diary

Relevant documents and support material for meetings may relate to:
- overhead transparencies
- promotional brochures
- product samples
- catalogues
- work completed for the client
- product prototypes/samples
- business proposals
- tenders
- reports
- meeting papers
- presentation kits
- office supplies
- information technology (e.g., laptop, computer software)
- telecommunication equipment (e.g., mobile phone, teleconferencing equipment)

Designated timelines may relate to:
- a timeframe considered appropriate by the individual making travel arrangements
- a timeframe agreed upon by the individual making travel arrangements and the traveler
- a timeframe that has been formally arranged (e.g. at a meeting)
- carrier schedules (e.g. flight times)
- traveler's/client's other commitments

Points of contact may relate to:
- points of arrival and departure for the traveler
- meeting venues
- arranged appointments
- accommodation check-in points
- other similar organizations in the area
- branch offices
- hotels

Contact persons may relate to:
- people to be met at arranged appointments

- people to contact within branch offices
- people to contact within other organizations
- people involved with travel arrangements, such as transport and accommodation
- people/organizations to target, with no pre-arranged appointment

Relevant documents for the traveler may include:
- travel itinerary
- passport
- visa
- business schedule
- maps
- timetables
- travel vouchers
- meeting agenda and other documents
- list of contacts

Methods of payment may include:
- accounts established with the enterprise
- a purchase order from the enterprise
- company credit cards
- the traveler pays and is reimbursed at a later date
- the enterprise provides the traveler with a cash advance
- special arrangement made between the enterprise and individual suppliers

ASSESSMENT GUIDE

Forms of assessment

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- enterprise policies and procedures regarding travel
- appropriate timetables and forms
- reference material, such as possible accommodation and transport suppliers
- calendar
- appointment books, diaries and other recording systems
- preferred suppliers and contact details

- maps
- credit facilities

Assessment context

Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Critical aspects (for assessment)

- enterprise procedures and policies for business trips are understood and followed
- the purpose of the trip is understood
- an accurate briefing outlining the traveler's organizational requirements is clarified and confirmed
- traveler's preferences have been taken into account
- at least one form of a checklist is used to organize travel details
- travel file is established for each trip
- travel arrangements are appropriate and such that adequate time is allowed to travel to, from and between appointments, time is not wasted
- the details of the trip are arranged in order of priority
- a collection of reference material is gathered to facilitate the planning process
- an itinerary that lists the accurate travel details is supplied and confirmed with the traveler

- the itinerary is presented in a clear format best suited to the traveler's needs
- booking arrangements are made and confirmed
- an appointment profile is prepared and confirmed with both the traveler and the persons that he/she is meeting
- specific travel requirements are clarified and confirmed within designated timelines

all relevant financial arrangements are organized and confirmed in line with enterprise procedures and policies

Assessment conditions

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
- enterprise policies and procedures regarding travel itinerary formatting and preparation - filing systems - checklist systems - booking procedures - sources of relevant documents and support material - credit facilities	- literacy: reads a variety of texts, e.g. enterprise procedures, travel timetables, conference brochures; - writes clear and detailed instructions in logical sequence - research: locates specific information regarding appropriate transport, meeting venues, accommodation, contacts etc.; analyses and summarizes data to produce schedule/itinerary/report - communication: participates effectively in spoken interactions; listens to detailed oral instructions; - questions to clarify and evaluate information; offers opinion on information gathered from a variety of sources; - time management: allows sufficient time to prepare business and travel documentation - problem-solving: chooses appropriate solution from a range of available solutions - numeracy: estimates time and plans accurately; interprets, compares and calculates with money

Unit 20

UNIT TITLE	**Produce reports as required for cash flow forecasts and budgetary purposes**				
DESCRIPTOR	This Unit covers collecting and preparing data to be used in forecasts, budgets and costing reports for administrative activities, for example, seminars, conferences and purchase of resources. This unit can be assessed alone or in combination with other units making up a job role.				
CODE	SOC25S2U10V1	**Level**	4	**Credit**	10

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Undertake and document costing procedures	1.1 Relevant data identifying costs is obtained from appropriate documentation 1.2 Material, labor and overhead costs are calculated 1.3 Break-even analysis is determined if required 1.4 Unit cost/product price is determined 1.5 Costing system is maintained to ensure all relevant information is up to date, accurate and confidential 1.6 Report identifying likely contain

2. Prepare financial reports to enable preparation of cash flow forecasts and budget reports	2.1 Purpose of the report is clarified with nominated person
	   a. Relevant data is obtained from the nominated internal and/or external sources including any indices or historical data required to update previous forecast.
	   b. Determination of indices to be utilised for percentage increase rate is made by either:
	   c. judgement of employee on information sourced from industry/enterprise information network and/or nominated government authorities, or
	   d. direction from management
	   e. Report is produced using appropriate design and structure for the data
	   f. Reports are distributed to nominated personnel within designated timelines

3. Draft financial forecasts/budgets	3.1 Prepare draft financial forecasts/budget from data contained in financial reports

| | 3.2 Relevant records are updated to indicate current financial position of forecast or budget |
| | 3.3 Nominated personnel are advised of updated records within designated timelines |

Range Statement

Relevant cost data may include**:**
- assets
- liabilities
- proprietorship

Appropriate documentation may include:
- balance sheet
- budgeted balance sheet
- capital expenditure budget
- cash flow analysis
- general ledger
- product activity
- profit and loss statement
- revenue and expenditure report/budget
- sales analysis report/budget
- variance analysis

Material costs may include:
- stock
- raw materials

Labour costs may include:
- salary/wage
- Work cover insurance
- Superannuation Guarantee charge
- leave loading
- allowances

Overhead costs may include:
- administrative costs
- management
- insurances
- utilities

- telephone and communications
- financial and accounting services
- training
- advertising and marketing
- maintenance
- depreciation of machinery and equipment
- leasing costs
- furniture
- rental

Break-even analysis may include:
- cost to produce each unit
- indirect costs incurred to operate the enterprise
- direct costs involved with production/provision of product
- total costs and total revenues
- selling price per unit

Determining unit cost/product price may include**:**
- people-hours
- machine hours
- factory/office floor space
- materials consumed
- administrative expenses
-

Maintaining costing system may include:
- reflecting changes within the market
- updating costs of products/services as changes occur
- using computerized costing system
- storing data

Report on final cost/price may include:
- actual or budgeted costing
- data and calculations
- variations highlighted
- contingencies covering uncertain events
- enterprise format for report writing

Within designated timelines may include:
- deadline agreed with supervisor
- enterprise deadline

- deadline agreed with accounting department

Purpose of report may include:
- analyzing performance
- measuring strengths and weaknesses
- planning for new financial year
- preparing budgets and setting goals

Nominated person may include:
- accountant
- business manager
- supervisor

Relevant data may include:
- income (e.g. sales, interest)
- expenses (e.g. stock purchases, materials, rent, wages)

Nominated internal and/or external sources may include:
- enterprise accounts department
- suppliers
- government departments/authorities
- competitors

Indices and historical data may include:
- consumer price index
- past sales figures
- government statistics
- market trends
- demographic data

Appropriate report design and structure may include:
- table of contents
- figures/financial data
- explanatory notes
- recommendations and contingencies
- graphs, tables, charts
- distribution list

Nominated personnel may include:
- supervisor
- senior administration

- sales department
- management
- purchasing department

Designated timelines may include:
- end of budget period
- deadline agreed with management
- deadline agreed with supervisor

Draft financial forecasts/ budget may include:
- projecting outflows for expenses
- projecting cash flow for specific projects
- projecting outflows for cost of goods sold
- projecting outflows for major purchases
- projecting outflows for debt management
- projecting inflows from revenues, i.e. sales

Relevant records may include:
- paper-based
- electronic
- enterprise accounting package

Designated timelines may include:
- on finalizing report
- when current position is known

ASSESSMENT GUIDE

Forms of assessment

Competency may be assessed through:
- Portfolio Assessment
- Interview
- Simulation/Role-plays
- Observation
- Third Party Reports
- Exams and Tests

Assessment context

Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise

- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Critical aspects (for assessment)
- purpose of report is clarified with nominated person if necessary
- relevant data is obtained from appropriate sources
- data is obtained according to enterprise policies and procedures
- costs (e.g. material, labor, overhead) are correctly calculated including:
  1. analysis of direct costs
  2. analysis of fixed and variable costs
  3. break-even analysis is prepared if required
  4. cost per unit is accurately determined
  5. costing system is maintained and accurately reflects changes in the market
  6. costing system is up-to-date, accurate and confidential
- report identifies likely contingencies and final cost/price is prepared within designated timelines
- all data and calculations are accurately and clearly presented
- percentage rate increases are determined by consulting relevant indices and other sources and in discussion with supervisor
- report is prepared using appropriate format and structure, according to enterprise requirements
- draft reports are self-checked for relevance, format and accuracy of content
- report is presented to nominated person for review/approval within designated timelines
- records are updated to reflect current financial position
- relevant personnel are notified of updates according to enterprise policies and procedures

Assessment conditions

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- enterprise policies and procedures
- sample financial reports
- calculator
- computer and relevant software
- relevant indices and other information

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
- enterprise policies and procedures - roles of relevant personnel/departments - use of relevant indices and other information - enterprise report format - relevant software applications	- literacy: reads and understands complex financial procedures; follows and writes detailed instructions organized sequentially - numeracy: demonstrates knowledge of mathematical concepts; draws on prior mathematical knowledge, diagrammatic and other mathematic representation to interpret mathematical information; represents a range of data appropriately including tables, graphs; interprets and uses graphical representation as the basis for inference and prediction; calculates and contrasts monthly income from average sales; adheres to designated timelines - communication: presents oral/written financial report; answers questions and provides information; discusses and explains implications of financial forecasts. - problem solving: uses developed estimation skills to check outcomes; compares results to anticipated outcomes to confirm results

Unit 21

UNIT TITLE	Supervise the team to ensure team goals are achieved
DESCRIPTOR	This Unit covers the supervisory responsibilities for a team in liaison with management, including planning the team's goals and strategies, allocating responsibilities, monitoring the team's performance and identifying training needs. This unit can be assessed alone or in combination with other units making up a job role.

CODE	SOC25S2U11V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Plan work for team	1.1 Strategies for setting goals of the team are identified with Manager 1.2 Goals and responsibilities of the team are discussed and agreed upon with manager 1.3 The resources required are identified 1.4 Standards of performance required by team and individuals are established 1.5 The reporting requirements of the tasks are determined
2. Allocate tasks to members of the team	2.1 Tasks and responsibilities of individuals in team are allocated 2.2 Strategies for achieving goals are discussed and agreed upon by team 2.3 Timelines for tasks are negotiated and agreed upon
3. Monitor team performance	3.1 Agreed timelines for completion of team tasks are checked at regular intervals 3.2 Alternative strategies to achieve team tasks are implemented when timelines are not being met 3.3 Standards of performance and reporting requirements are checked at regular intervals 3.4 Feedback is provided to individual team members
4. Recognize training needs	4.1 Staff training needs are identified in consultation with staff 4.2 Appropriate resources are allocated to enable training to take place

Range Statement

Available resources may include*:*

- budget
- equipment
- people
- time

Staffing of team may be*:*

- part-time
- casual
- full-time
- combinations

Strategies may relate to:
- deciding on the best way to ensure designated timelines are met
- making decisions on how the team operates
- training of team members
- reporting or support relationships
- communication channels
- access to restricted areas
- team decision making
- brainstorming

Goals may include:
- management
- administrative support
- sales
- customer service
- project
- financial management
- work tasks and budgets
- projects
- performance improvements
- job redesign

Manager may include:
- department manager
- office manager
- enterprise manager

Reporting requirements may be:
- between team leader and team members
- between team leader and management
- between teams
- formal
- informal
- horizontal
- vertical

Allocating responsibilities and tasks to individual team members may include:
- discussing tasks to be carried out on an individual basis
- agreeing upon particular roles and responsibilities to be assumed by the team member
- taking into account external factors
- ensuring understanding, awareness and support by all team members of each other's responsibilities
- ensuring collective ownership of key tasks and roles
- encouraging team members to allocate tasks and responsibilities

External factors may include:
- existing workload
- skill profile
- development needs
- work status (full-time/part-time) and time available
- other staff
- other commitments

Discussing strategies for achieving goals with team may include:
- brainstorming
- feedback
- team meetings
- group decision making
- open communication

Timelines may include
- personal deadlines
- timelines agreed with the team leader
- timelines agreed in discussion with team members
- client negotiated timelines

Negotiating and agreeing upon timelines may involve:
- scheduling planning time with the team
- ensuring planning time is a continuous process to meet changing circumstances
- mapping and prioritizing the tasks
- discussing deadlines
- discussing and deciding on what resources will be needed

Regular may be:
- a continuous, on-going process

- periodically (e.g. daily, weekly or monthly)

Checking agreed timelines at regular intervals may involve:
- holding regular team meetings to report on progress
- setting mini-deadlines during a project where work is presented to a supervisor
- monitoring daily work schedules
- monitoring long-term work schedules

Implementing alternative strategies when timelines are not bring met may include:
- re-negotiating with the client
- reprioritizing and, if possible, recovering time later
- narrowing the scope of the task by eliminating non-essential elements
- deploying more resources
- substituting a comparable item if possible
- looking for another supplier or accepting partial delivery to keep the task on schedule
- re-negotiating the work schedule with team members to redistribute

Checking standards of performance and reporting requirements at regular intervals may include:
- monitoring on a regular, formal basis (e.g. team meetings and interviews with team)
- preparing work schedules and progress reviews
- informal discussions with the team

Feedback may include:
- letting a team member know how to do something better next time
- clarifying the enterprise's preferred way of doing something
- showing a team member, he/she has not finished his/her task
- letting a team member know he/she is on the right track
- encouraging a team member

Providing feedback to individual team members may include:
- informal written and/or verbal communication
- formal written and/or verbal communication
- delivery in a positive and constructive way without being judgmental
- increasing the motivation and morale of the individual

Training may include:
- extending existing skills and competencies
- inducting new employees
- introducing new areas of work
- improving quality and performance

Identifying training needs may include:
- monitoring work performance
- knowledge and application of policies and procedures
- evaluating current skills and knowledge of team members
- checking training records and staff appraisal records
- conducting a training needs analysis which identifies the issues or problems and how they can be addressed

Consultation with staff may include:
- informal discussions
- formal meetings or discussions
- email or web page interaction with staff
- written or spoken questionnaires
- group or one-on-one discussions

Appropriate training resources may include:
- personnel
- materials
- equipment and technology
- space for training
- refreshments and other personal needs

Personnel may include:
- team leader
- team members
- competent trainers or a training manage
- other staff
- technical or computer staff
- assessors
- guests

Materials may include:
- learning resource materials
- information resources such as promotional brochures, safety booklets and procedure manuals

Equipment and technology may include:
- computers
- software
- video players

- overhead projector
- whiteboard
- photocopier
- other appropriate office equipment

ASSESSMENT GUIDE
Forms of assessment
Competency may be assessed through:
- Portfolio Assessment
- Interview
- Simulation/Role-plays
- Observation
- Third Party Reports
- Exams and Tests

Assessment context
 Evidence of competency can be met in different situations, including:
- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

 Evidence gathering methods may include:
- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work document
- third party reports

Critical aspects (for assessment)
- work environment in which the team operates is understood
- strategies for setting goals and the goals and responsibilities of the team are discussed with the team/supervisor/manager
- required resources are identified and budget constraints considered when planning
- cost structures relating to required resources are understood

- when additional resources are required, reasoned arguments can be forwarded to designated person
- planning is carried out with team members ensuring that all team members are involved in, contribute to, and own the outcomes of the planning process
- leads team members through the planning process
- team goals and objectives are set which contribute to the broader organisational objectives
- tasks and strategies are achievable and appropriate
- the team understands tasks, strategies, timelines and standards of performance required
- the team performs effectively and achieves goals
- specific performance targets and particular responsibilities of team members are identified
- own time is managed effectively
- planning sessions are regular and reflect changing circumstances
- reporting arrangements within the team are established
- specific work tasks of individual team members are coordinated
- positive team culture is encouraged and morale is maintained
- timelines and completion dates are established so that team goals are achieved within
- designated timelines
- progress of work is monitored according to project and enterprise requirements
- when timelines are not being met, alternative strategies are identified and implemented
- feedback is provided to/sought from the team in a positive and constructive manner
- staff training needs are identified in consultation with *designated person*
- type and purpose of training are determined
- appropriate training resources are identified and allocated
- reasons for additional training are communicated clearly to *designated person*
- the particular needs of part-time/casual staff are identified and suitably supported within the team

Assessment conditions

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills

• enterprise business plan • enterprise policies and procedures across the range of tasks required	• literacy: interprets enterprise's goals for the team; writes organizational procedures for team; follows complex flowchart in order to identify and distil relevant information; • communication: listens and responds constructively to the team; evaluates how ideas may • be applied to group; defines and monitors purposes and objectives to be achieved; explores ideas in discussion; listens and provides/encourages feedback • planning and organisational • time-management and numeracy: developed recording and estimation processes; records and files data; estimates time and plans accurately • problem solving: uses processes flexibly and interchangeably; experiments with a range of systems and chooses most appropriate; analyses and compares results to anticipated outcomes to confirm results • research and analytical: evaluates situations or processes, assembles evidence and makes • judgements; selects and modifies processes appropriately

Unit 22

UNIT TITLE	**Plan and promote a Training Program**
DESCRIPTOR	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.				
CODE	SOC25S2U12V1	**Level**	4	**Credit**	6

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Identify the competency needs	1.1 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 1.2 Relevant competency or other performance standards for the target group are obtained and verified with appropriate personnel 1.3 Gaps between the required competencies and current competencies of the target group are determined 1.4 Current competencies and any relevant characteristics of each participant in the target group are identified using appropriate investigation methods
2. Document training program requirements	2.1 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 2.2 Training program documentation specifies the range of workplace applications, activities and tasks that 2.3 Available training programs and resources are customised to meet specific client needs, where required 2.4 Appropriate grouping of activities is identified to support formative and summative assessments 2.5 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

	2.6 Methods of supporting and guiding participants within the target group are identified and specified
3. Identify program resources	3.1 Resources required for the program are identified and approved by appropriate personnel and allocated to meet training participants' characteristics are allocated 3.2 Safe and accessible training environment are identified and arranged to support the development of competencies 3.3 Arrangements are made with personnel required to support the training program 3.4 A register of training resources is maintained and held in an accessible form
4. Promote training	4.1 Advice on the development of the training program is provided to appropriate personnel 4.2 Information on planned training events is made widely available, utilising a variety of methods 4.3 Promotional activities are monitored for effectiveness in collaboration with the client and appropriate personnel

Range Statement

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 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 organization

- 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 organization

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

- 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 centered, participant centered
- real time, time independent
- place dependent, place independent
- interactive (e.g. 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

ASSESSMENT GUIDE

Forms of assessment

Competency may be assessed through:

- Portfolio Assessment
- Interview
- Simulation/Role-plays
- Observation
- Third Party Reports
- Exams and Tests

- **Interdependent assessment of units:**

  This unit of competency may be assessed in conjunction with other units that form part of a job role.

Access to target group, potential opportunities to identify training needs of a target group, relevant competencies or other standards of performance and resources.

Assessment context

Assessment may occur on the job or in a simulated workplace.

Critical aspects (for assessment)

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

Assessment conditions

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning skills
· understanding Assessment and Workplace Training Competency Standards and Assessment Guidelines · relevant competency standards, including industry or enterprise standards of performance · relevant workplace policies and procedures that apply to that work and (any) related legislation or regulatory requirement · 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	· language, literacy and numeracy skills required to: − collect, summaries 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 customize training materials and specified documentation using clear and comprehensible language and layout − calculate and estimate costs, time and length of training programs

· 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	· awareness of language, literacy and numeracy issues relevant to the context of training and assessment. · communication skills appropriate to the culture of the workplace, appropriate personnel and target group

Unit 23

UNIT TITLE	Review training				
DESCRIPTOR	This unit covers the requirements of persons to record training data and review training.				
CODE	SOC25S2U13V1	**Level**	4	**Credit**	5

ELEMENTS OF COMPETENCIES	PERFORMANCE CRITERIA
1. Record training data	1.1 Details of training program and target group's competency attainment are recorded in accordance with the training system requirements and securely stored 1.2 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	2.1 Training is evaluated against identified needs and goals of the training program
	2.2 Feedback on the training program is sought from training participants and appropriate personnel
	2.3 Training participants are encouraged to evaluate how progress towards achieving competency was enhanced by the training sessions
	2.4 Trainer's performance is reviewed against:
	  - program goals
	  - the Assessment and Workplace Training Competency Standards
	  - training participants' comments
	  - training participants' competency attainment
	2.5 Results of the evaluation are used to improve current and future training
	
	2.6 Suggestions are made for improving any aspect of the recording procedure

3. Report on training	3.1 Reports on outcomes of the training sessions are developed and distributed to appropriate personnel

Range Statement

Training program:

- A collection of training 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 organization
- 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 organization

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

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 organization
- a combination of the above

Reports on training may be:

- on a preform or template
- written
- verbal
- combination of the above

Training evaluation may include:

- affective (e.g. satisfaction with the program)
- cognitive (e.g. knowledge or skill gain)
- performance or behavior (e.g. 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

Record systems may be:

- paper based
- computer based systems using magnetic or optical storage
- combination of both paper and computer based systems.

Training session may involve:

- 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 centered, participant centered
- real time, time independent
- place dependent, place independent
- interactive (e.g. 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 participant's workplace
- off the job in a special demonstration area
- off the job in external training room
- work/field placements
- job rotation
  - a combination of the above.

ASSESSMENT GUIDE
Forms of assessment

- 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.

Critical aspects (for assessment)
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

Assessment conditions

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

UNDERPINNING KNOWLEDGE AND SKILLS

Underpinning knowledge	Underpinning 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 organization's 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, organize and analyze 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 LL&N with technical training · application of cultural understanding in the context of training and assessment.