



Occupational Standards for Caribbean Vocational Qualifications (CVQ)

CCBSB30211

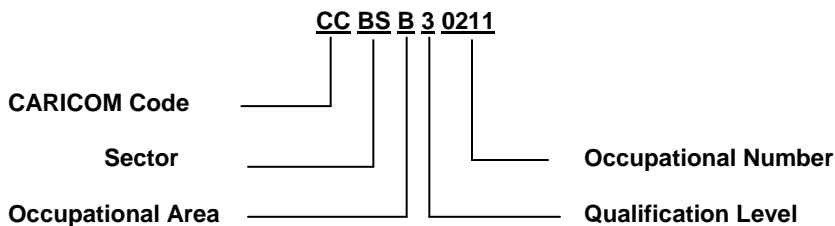
Level 3 in Administrative Assistance

Unit Number	Unit Title	Requirement
BBSBAD0403B	Supervise the team to ensure goals are achieved	Mandatory
BSBBAD0853B	Deal with conflict situations	Mandatory
BSBBAD0743B	Organize schedules	Mandatory
BSBBAD0553B	Plan and manage meetings	Mandatory
BSBBAD0323B	Plan business trips and associated itinerary to ensure efficient travel	Mandatory
BSBBAD0392C	Transcribe and produce text from audio and notes	Mandatory
BSBBAD1392A	Develop minute-taking and production techniques and meeting protocol skills	Mandatory
BSBRKG0043B	Manage and monitor business records system	Mandatory
BSBBAD0683B	Use and maintain electronic mail system	Mandatory
BSBBAD0643B	Apply the principles of confidentiality and security	Mandatory
BSBBAD0573B	Develop work priorities	Mandatory
BSBBAD0763B	Coordinate implementation of customer service strategies	Mandatory
BSBBAD0773B	Research, prepare and present information	Mandatory
BSBBAD0803B	Coordinate business resources	Mandatory
BSBBAD0813B	Contribute to effective workplace relationships	Mandatory
BSBBAD0473B	Plan and manage conferences	Mandatory
BSBBAD0833B	Maintain computer files	Mandatory

To obtain a Caribbean Vocational Qualification (CVQ) all Mandatory Units must be achieved.

Legend to Occupational Standard code

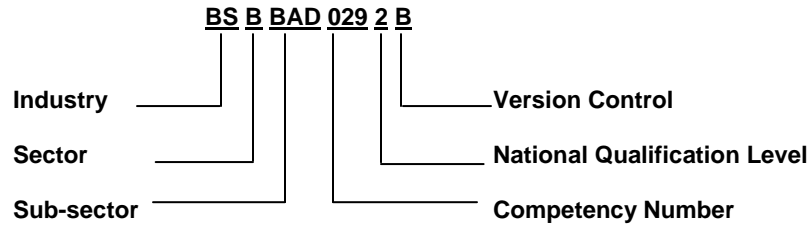
Example: CCBSB30211



KEY: CC – CARICOM; BSB – Business Services Business; 3 – Level, 02 – 11 –Year Revised

Legend to Unit Code

Example: BSBBAD0291A



KEY : BS – Business Services; B- Business; BAD – Business Administration; 029–unit # ; 2 – Level 2; B – first version

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Country of Origin: JAMAICA

Qualification Overview

Who the qualification is for: This Qualification is for independent or autonomous Business Administrative Skilled worker.

Persons who complete this qualification may be employed in the following jobs:

- *Executive Assistant*
- *Office Coordinator*
- *Administrative Manager*

Occupational Standards can also be used to:

- Prepare job descriptions and specifications
- Determine recruitment criteria
- Appraise staff performance objectively
- Identify skill and training gaps and needs
- Conduct labour market analyses
- Develop curriculum
- Assess the effectiveness of training programmes
- Determine compensation and rewards

The benefits of acquiring the CVQ to Candidates

- Provide a basis for articulation and accreditation
- Provides a broad-based preparation for employment
- Is an alternative route to further / higher education
-
- Complements and has parallel standing with academic qualifications
- Provides enhanced employability and higher earning potential
- Facilitates an apprenticeship with actual work experience
- Equips candidates with the knowledge, skills and attitudes for the workplace
- Past work experience and skills can count towards achieving the CVQ
- Allows for continuity whereby if a candidate cannot complete the CVQ at a centre or school, they can continue at another approved centre
- CVQ's are recognized qualifications and facilitates free movement of labour throughout CARICOM

The benefits of the CVQ to Employers

- Provides a larger cadre of skilled employees/candidates to choose from
- Reduces cost of recruiting and selecting the ideal job candidate
- Reduces cost for training workers
- Ensures higher levels of productivity

The benefits of the CVQ to the Caribbean region:

- Produces a higher skilled workforce that is ready to adapt to ever-changing global demands
- Provides greater access for persons to achieve higher qualifications
- Contributes to the region's human resource capacity development

BSBBAD0403A: Supervise the team to ensure goals are achieved

Unit 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.

ELEMENTS

PERFORMANCE CRITERIA

Candidates must be able to:

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.	Recognise training needs	4.1	Staff's training needs are identified in consultation with staff.
		4.2	Appropriate resources are allocated to enable training to take place.

RANGE STATEMENTS

All range statements must be assessed

1. Available resources may include:
 - budget
 - equipment
 - people
 - time
2. Staffing of team may be:
 - part-time
 - casual
 - full-time
 - combinations
3. 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
4. Goals may include:
 - management
 - administrative support
 - sales
 - customer service
 - financial management
 - work tasks and budgets
 - projects
 - performance improvements
 - job redesign
5. Identifying strategies for setting goals with the manager may involve:
 - reflecting and meeting broader enterprise objectives
 - the team leader communicating with the manager at the outset of the planning process to find out what outcomes are required by management
 - confirming the team plan with management after the team goal setting process has been finalised to ensure there is agreement at more senior levels with the outcomes
6. Manager may include:
 - department manager
 - office manager
 - enterprise manager

7. Discussing goals and responsibilities of the team with the manager may include:
 - discussing team members needs
 - discussing tasks
 - clarifying objectives
 - discussing team member commitments
8. Required resources may include:
 - people
 - time
 - money
 - equipment
 - materials
9. Identifying resources may include:
 - identifying available resources
 - identifying resource shortages
 - negotiating with management to increase/maintain resources
10. Meeting requirements may be:
 - highly structured
 - team meetings
 - informal
 - formal
11. Reporting requirements may be:
 - between team leader and team members
 - between team leader and management
 - between teams
 - formal
 - informal
 - horizontal
 - vertical
12. Establishing standards of performance may relate to:
 - enterprise standards/benchmarks
 - comparison with other teams/projects
 - own standards
 - time management
 - team agreeing on expected standards of performance
13. 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 others responsibilities
 - ensuring collective ownership of key tasks and roles
 - encouraging team members to allocate tasks and responsibilities
14. Additional factors may include:
 - additional workload
 - skill profile
 - development needs
 - work status (full-time/part-time) and time available
 - other staff
 - other commitments

15. Discussing strategies for achieving goals with team may include:
- brainstorming
 - feedback
 - team meetings
 - group decision making
 - open communication
16. Timelines may include:
- personal deadlines
 - timelines agreed with the team leader
 - timelines agreed in discussion with team members
 - client negotiated timelines
17. Implementing alternative strategies when timelines are not being met may include:
- re-negotiating with the client
 - reprioritising 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
18. 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
19. 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
20. Training may include:
- extending existing skills and competencies
 - inducting new employees
 - introducing new areas of work
 - improving quality and performance
21. Personnel may include:
- team leader
 - team members
 - competent trainers or a training manager
 - other staff
 - technical or computer staff
 - assessors
 - guests
22. Appropriate training resources may include:
- personnel
 - materials
 - equipment and technology
 - space for training
 - refreshments and other personal needs

23. Providing feedback to individual team members may include:
- written and/or verbal communication; formal & informal communication
 - delivery in a positive and constructive way without being judgemental
 - increasing the motivation and morale of the individual
24. 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
25. Identifying training needs may include:
- monitoring work performance
 - evaluating 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
26. 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
27. Equipment and technology may include:
- computers
 - software
 - video players
 - overhead projector
 - whiteboard
 - photocopier
 - other appropriate office equipment
28. Materials may include:
- learning resource materials
 - information resources such as promotional brochures, safety booklets and procedure manuals
29. Regular may be:
- a continuous, on-going process
 - periodically (e.g. daily, weekly or monthly)

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the individual strengths and weaknesses of team members
2. What special skills are possessed by individual team members
3. What are the tasks to be carried out
4. What are the resources that are required by the team to carry out the task
5. How to interpret enterprise's goals for the team; write organisational procedures for team; follow complex flow-chart;
6. How to listen and respond constructively to the team;
7. How to define and monitor purposes and objectives to be achieved
8. plan and organise
9. develop recording and estimation processes; record and file data; estimate time and plans accurately
10. How to use processes flexibly and interchangeably; analyse and compare results to anticipated outcomes to confirm results
11. How to evaluate situations or processes, assemble evidence and make judgements; select and modify processes appropriately

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. identify required resources and budget constraints considered when planning
- b. carry planning out with team members ensuring that all team members are involved in, contribute to, and own the outcomes of the planning process
- c. tasks and strategies are achievable and appropriate
- d. explain tasks, strategies, timelines and standards of performance to the team
- e. identify specific performance targets and particular responsibilities of team members
- f. establish reporting arrangements within the team
- g. positive team culture is encouraged and morale is maintained
- h. monitor progress of work according to project and enterprise requirements
- i. identify and implement alternative strategies when timelines are not being met
- j. provide/sought feedback from the team in a positive and constructive manner
- k. identify training needs consultation with designated staff
- l. identify particular needs of individual team and give support

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The learner should have access to appropriate documentation and resources normally used in the workplace.

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0853B: Deal with conflict situations

Unit Descriptor:

This unit deals with the skills and knowledge required to handle difficult interpersonal situations –with customers,

ELEMENTS	PERFORMANCE CRITERIA
Candidates must be able to:	
1. Identify conflict situations	1.1 Potential for conflict is quickly identified; swift and tactful action is taken to prevent escalation. 1.2 Situations where personal safety of customers or colleagues may be threatened are quickly identified and appropriate assistance is organised.
2. Resolve conflict situations	2.1 Responsibility is taken for finding and developing a solution to the conflict within the scope of the individual's job. 2.2 All points of view are encouraged, accepted and treated with respect. 2.3 Effective communication skills are used to assist in the management of the conflict. 2.4 Appropriate conflict resolution techniques are used to manage the conflict situation.
3. Respond to customer complaints	3.1 Complaints are handled sensitively, courteously and discreetly. 3.2 Responsibility is taken for resolving the complaint. 3.3 The nature and details of the complaint are established and agreed with the customer. 3.4 Appropriate action is taken to resolve the complaint to the customer's satisfaction wherever legally possible.

- 3.5 Where appropriate, techniques are used to turn complaints into opportunities to demonstrate high quality customer service.
- 3.6 Any necessary documentation is completed accurately and legibly within time constraints.

RANGE STATEMENTS

All range statements must be assessed

1. Conflict situations may include but not limited to:
 - customer/supplier complaints
 - conflicts among work colleagues
 - refused entry
 - drug or alcohol affected persons
 - ejection from premises
 - breach of rules and protocols
2. Effective communication skills may include:
 - active listening
 - effective questioning
 - ejection from premises
3. Conflict resolution techniques may include but not limited to:
 - empathy

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the different conflict resolution techniques
2. How to identify potential for conflict
3. How to identify situations where personal safety of customers or colleagues may be threatened
4. How to find resolve conflict
5. How to manage the conflict situation
6. How to handle complaints
7. How to establish nature and details of complaints
8. How to turn complaints into opportunities

EVIDENCE GUIDE

(1) Critical Aspects and Evidence

Evidence should include a demonstrated ability to:

- a. identify potential conflict situation and diffuse it
- b. establish the nature and details of the complaint with the customer
- c. apply conflict resolution techniques to resolve a range of different conflict situations in contexts appropriate to the situation
- d. use conflict resolution techniques to turn complaints into opportunities
- e. identify situations where personal safety of customers or colleagues are threatened and take action to organize their safety

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. A fully equipped establishment with the following equipment: Candidate should have access to all relevant resources and documents normally used in the work situation.

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0743B: Organise schedules

Unit Descriptor:

This unit covers managing appointments and diaries for personnel within the organisation, using both manual and electronic diary/appointment systems.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | |
|----|-----------------------------------|-----|--|
| 1. | Organise and maintain appointment | 1.1 | Appointments are allocated within available time schedules and confirmed. |
| | | 1.2 | Dates, which are not available for appointments, are appropriately indicated in diary. |
| | | 1.3 | Personal requirements for diary/schedule items are determined and co-ordinated for individual personnel. |
| | | 1.4 | Appointment priorities are established and clarified in discussion with individual personnel. |
| | | 1.5 | Availability of attendees is established and new appointments are scheduled in accordance with required timelines and diary commitments. |
| | | 1.6 | Alternative arrangements are negotiated and confirmed when established appointments are changed. |
| 2. | Manage schedule/appointments | 2.1 | Appointments are tactfully cancelled/rescheduled as soon as possible. |
| | | 2.2 | Recurring appointments and deadlines are identified and scheduled in accordance with individual and organisational requirements. |
| | | 2.3 | Appointment diaries are co-ordinated frequently so that information is always up-to-date. |
| | | 2.4 | Appointments are appropriately spaced, including adequate travelling time. |
| | | 2.5 | Essential information and action notes are monitored. |
| 3. | Use reminder systems | 3.1 | Timely reminders are made to the manager regarding appointments. |
| | | 3.2 | Visual/memory aids and follow-up systems are accurately maintained. |

- 3.3 Appointments are recorded and schedules managed in accordance with organisational policy and procedures.
- 3.4 Security and confidentiality procedures are implemented and maintained.

RANGE STATEMENTS

All range statements must be assessed.

1. Records may include:
 - diary
 - calendar
 - paper based
 - electronic
 - filing system
2. Organisational requirements may include:
 - availability of information
 - priority clients / personnel
 - recording systems
 - protocols in contacting other personnel within and outside organisation
 - electronically linked diaries/schedules
 - linking personal and executive diaries
3. Planning tools may include:
 - manual planners
 - planning wall chart
 - in/out boards/whiteboards
 - appointment book
 - calendar
 - desk diary
 - electronic calendar/diary
 - appointment view; planner view in electronic scheduling systems
4. Diary/schedule items may include:
 - meetings
 - conferences
 - teleconferences
 - recurring appointments
 - deadlines
 - leave (for both immediate person and others whose absence affects the person)
 - travel
5. Alternative arrangements may include:
 - inserting additional appointments after a schedule has been prepared
 - cancelling pre-arranged appointments
 - re-scheduling existing appointments
6. Organisational policy and procedures may include:
 - occupational health and safety issues
 - adequate time between appointments
 - lunch breaks
 - limit on total appointments in any one day
 - sufficient time to complete projects and meet deadlines
 - stress minimisation
 - leave
 - time off in lieu
5. Recurring appointments may include:
 - board meetings
 - committee meetings

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the policies and procedures in regard to making appointments
2. What are the types of manual and electronic diary systems
3. What are the techniques to prepare personal plans and establish priorities
4. What are the relationship between organising another person's schedule satisfactorily and achieving team goals
5. What are the responsibility involved in making other's arrangements
6. information sources
7. How to read a range of procedural texts; write simple instructions for a particular routine task; interpret information gained from diaries and charts
8. How to discuss and confirm requirements and priorities of others; question to clarify information
9. How to utilise the relevant technology to develop reminder technique
10. How to apply time-management skills to allow realistic timelines to schedule appointments
11. How to use problem-solving skills to negotiate task distribution with other members of the group; select most appropriate times for appointments etc
12. How to use numeracy skills for time estimation, accurate planning and record keeping
13. How to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
14. How to read a range of procedural texts; write simple instructions for a particular routine task; interpret information gained from diaries and charts
15. How to discuss and confirm requirements and priorities of others; question to clarify information
16. How to utilise the relevant technology to develop reminder technique
17. How to apply time-management skills to allow realistic timelines to schedule appointments
18. How to use problem-solving skills to negotiate task distribution with other members of the group; select most appropriate times for appointments etc
19. How to use numeracy skills for time estimation, accurate planning and record keeping
20. How to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

To obtain competence it is essential that candidate demonstrate the ability to:

- a. schedules which meet individual and organisational needs
- b. ability to prioritise and negotiate
- c. demonstrate knowledge of occupational health and safety issues related to scheduling and workload
- d. seeks advice and acts on feedback from supervisors and colleagues on schedules and events
- e. uses available business technology appropriate to the task

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The following resources should be made available manuals and reference materials outlining policies and procedures regarding appointments, diary and planner resources to record and schedule appointments, calendar, appointment books, diaries and other recording systems, maps

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0553B: Plan and manage meetings

Unit Descriptor:

This unit deals with managing and preparing for meetings, chairing the meetings, organising the minutes and reporting outcomes.

ELEMENTS		PERFORMANCE CRITERIA	
Candidates must be able to:			
1.	Prepare for meetings	1.1	Purpose of meeting is clarified and the agenda developed in line with stated purpose.
		1.2	The style and structure of the meeting is appropriate to the meeting's purpose.
		1.3	Meeting participants are identified and notified according to organisational procedures.
		1.4	Meeting arrangements are confirmed according to requirements of meeting.
		1.5	Meeting papers are despatched to participants within designated timelines.
2.	Conduct meetings	2.1	Meetings are chaired in accordance with organisational requirements, agreed conventions for the type of meeting and legal and ethical requirements.
		2.2	Meetings are conducted to ensure they are focused and time efficient.
		2.3	Meeting facilitation enables participation, discussion, problem solving and resolution of issues.
		2.4	Minute taker is briefed on recording meeting notes according to organisational requirements and conventions for the type of meeting.
3.	Follow-up meetings	3.1	Transcribed meeting notes are checked to ensure they reflect a true and accurate record of the meeting and are formatted according to organisational procedures and meeting conventions.
		3.2	Minutes and other follow-up documentation are distributed within designated timelines and stored according to organisational requirements.
		3.3	Outcomes of meetings are reported as required, within designated timelines.

RANGE STATEMENT

All range statements must be assessed

1. Meeting purpose may include:
 - range of business items
 - setting of enterprise/team goals
 - planning and development of a project
 - progress of a project
 - discussion forum for internal/external clients
2. Agendas 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
 - any other business
 - date of next meeting
 - prayer
3. Meeting papers may include:
 - notice of meeting
 - agenda
 - previous minutes
 - financial reports
 - chairperson's report
 - research reports
 - itemised meeting papers
 - draft documentation
 - correspondence
4. Meeting arrangements may include:
 - scheduling the date and time for the meeting
 - booking an appropriate venue
 - recording of meeting
 - organising catering
 - organising accommodation and transport
 - organising appropriate communication technology
 - establishing costs and operating within a budget
 - preparing relevant documentation for participants
 - organising a minute taker
5. Meeting conventions may include:
 - quorum requirements
 - informal discussion
 - waiting to be recognised by the chairperson
 - speaking through the chairperson
 - restricting discussion to agenda items
 - time limit on speakers
 - moving and seconding formal motions
 - voting procedures
 - conflict of interest provisions
 - majority of members to agree
 - casting vote for chairperson
6. Meeting structure includes but not limited to:
 - face to face
 - circulate agenda prior to meeting
 - focussed agenda
 - listing of attendees
 - break

7. Legal and ethical requirements may include:
- requirements for public meetings
 - codes of practice
 - legislation relating to companies, associations etc.
8. Resolution may include but not limited to:
- agreeing on a course of action
 - deferring decisions to another meeting
9. Minutes may include:
- using previous minutes to determine required format
 - using organisation templates
 - meeting details (e.g. title, date, time, location)
 - welcome
 - names of absent and attending participants
 - apologies
 - approval of the record of previous minutes
 - matters arising from the previous minutes
 - correspondence
 - agenda items
 - reports
 - other business
 - date of the next meeting
 - action items
 - using lists rather than complete sentences
 - prayer
10. Naming and storage of documents may include:
- file names which are easily identifiable in relation to the content
 - file/directory names which identify the operator, author, section, date etc
 - file names according to organisational procedure e.g. numbers rather than names
 - electronic storage in folders, sub-folders, hard/floppy disk drives, CD ROM, tape backup, jump drives
 - organisation policy for backing up files
 - organisation policy for filing hard copies of documents
 - filing locations
 - security
 - authorised access
11. Designated timelines may include:
- time frame decided by participants
 - formal time frame set by the organisation
 - informal time frame set by the administrative organiser
 - project timelines
 - contractual obligations
 - statutory requirements (e.g. for annual general meetings)

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the organisation's procedures and policies in regard to meetings, chairing and minute-taking
2. What are the meeting terminology, structures and arrangements
3. What are the minute-taking format
4. What are the agenda format
5. chairing format
6. the organisation's record and circulation systems
7. What are the group dynamics including seating arrangements
8. How to select categories by which to organise information, and assess information for relevance and accuracy
9. How to identify and elaborate on key agenda items; and source additional information as required
10. How to take part in sustained and complex interpersonal exchanges; interact with others; listen to and incorporate/encourage feedback; conduct oral presentations to a group; answer questions; manage and work with a group to construct an action plan; consult with participants; chair meetings
11. How to use time-management skills to allow sufficient time to prepare for meetings

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. apply knowledge of conventions and procedures for both formal and informal meetings
- b. delegate tasks to staff with relevant skills
- c. identify and notify meeting according to organisational procedures
- d. despatch meeting papers to participants within designated timelines
- e. chaired Meetings in accordance with organisational requirements, agreed conventions for the type of meeting and legal and ethical requirements
- f. check transcribed meeting notes to ensure they reflect a true and accurate record of the meeting and are formatted according to organisational procedures and meeting conventions

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to reference material in regard to meeting venues, catering, transport, suppliers, names and contacts for meeting participants, office supplies and equipment, computer and relevant software

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0323A: Plan business trip and associated itinerary to ensure effective travel

Unit 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.

ELEMENTS		PERFORMANCE CRITERIA	
Candidates must be able to:			
1. Organise business itinerary	1.1	Purpose of travel is clarified.	
	1.2	Meeting details are identified.	
	1.3	Arrangements for meetings are made and confirmed with consideration of traveller occupational health and safety.	
	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 despatched to the traveller within designated timelines.	
2. Identify and arrange credit facilities	2.1	Methods of payment are checked and confirmed.	
	2.2	Credit transfers, currency and traveller's cheques are arranged in accordance with organizational policy and procedures	
3. Make travel arrangements	3.1	Bookings are made in accordance with organisational policies and procedures for business travel.	
	3.2	Travel documents are identified and arranged in accordance with itinerary and individual requirements.	
	3.3	Travel arrangements are confirmed and confirmation documents checked and despatched to the traveller within designated timelines.	

- 3.4 Alternative arrangements are negotiated and confirmed in response to changed requirements.
- 3.5 Travel details and itinerary are *recorded* in accordance with organisational requirements.

RANGE STATEMENTS

All range statements must be assessed

1. Enterprise policies and procedures relating to travel arrangements may involve:
 - operational guidelines to be followed
 - names of personnel authorised to approve travel and travel expenditure
 - classes of travel and accommodation
 - documentation to be completed by the traveller
 - type and level of reimbursements for travel expenditure
 - names of preferred suppliers
 - accounts procedures
 - the appropriate individual or department that authorises travel
 - purchase orders
 - the financial arrangements established by the enterprise for business trips
2. Meeting details may include:
 - length
 - date
 - time
 - attendees
 - location
 - travel time to location
 - parking
 - preparing necessary documentation and resources
 - contact/client details
3. Recording may involve:
 - establishing an individual travel file for each key aspect of the trip
 - using a prepared checklist
 - using a diary
4. 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 traveller
 - a timeframe that has been formally arranged (e.g. at a meeting)
 - carrier schedules (e.g. flight times)
 - traveller's/client's other commitments

5. 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)
6. Daily itinerary details may involve:
 - arrival and departure times
 - transportation 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
7. Traveller occupational health and safety may include:
 - time between appointments
 - limit on total appointments in any one day
 - travelling time to reach venues
 - time for connections and transfers
 - limit on total amount of travel per day
 - rest periods
 - lunch breaks
 - leisure time
 - special health needs
8. Confirmation documents may include:
 - e-ticket
 - paper ticket/s
 - travel vouchers
 - electronic or printed air-line itinerary
 - accommodation confirmation e-mail, facsimile or letter
 - travel agent itinerary
9. Contact persons may include to:
 - people to be met at arranged appointments
 - people to contact within branch offices
 - people to contact within other organisations
 - people involved with travel arrangements, such as transportation and accommodation
 - people/organisations to target, with no pre-arranged appointment
10. Points of contact may relate to:
 - points of arrival and departure for the traveller
 - meeting venues
 - arranged appointments
 - accommodation check-in points
 - other similar organisations in the area
 - branch offices
 - hotels
 - mobile access
 - e-mail/facsimile access

11. Relevant documents for the traveller may include:

- travel itinerary
- passport
- visa
- business schedule
- maps
- timetables
- travel vouchers
- meeting agenda and other documents
- list of contacts
- health/medical documents
- accommodation guides insurance

12. Methods of payment may include:

- accounts established with the enterprise
- a purchase order from the enterprise
- company credit/debit cards
- the traveller pays and is reimbursed at a later date
- the enterprise provides the traveller with a cash advance
- special arrangement made between the enterprise and individual suppliers
- electronic transfer
- foreign currency
- traveller's cheque

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the enterprise policies and procedures regarding travel
2. What are the itinerary formatting and preparation
3. What are booking procedures
4. What are the credit facilities
5. What are the time zone difference for different countries
6. How to interpret travel timetables and conference brochures
7. How to locate specific information regarding appropriate transportation, meeting venues, accommodation, contacts etc
8. How to analyse and summarise data to produce schedule/itinerary/report
9. How to communicate and participate effectively in spoken interaction; listens to detailed oral instructions; question to clarify and evaluate information; offer opinion on information gathered from a variety of sources;
10. How to exercise time management to allow sufficient time to prepare business and travel documentation
11. How to exercise technological skills to access the Internet and make on-line bookings
12. How to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

1. understand and follow enterprise procedures and policies for business trips
2. take traveller's preferences into account when making travel arrangements
3. use checklist to organise travel details
4. establish travel file for each trip
5. make travel arrangements such that adequate time is allowed to travel to, from and between appointments
6. arrange details of the trip in order of priority
7. collection reference material to facilitate the planning process
8. supply and confirm with the traveller an itinerary that lists the accurate travel details
9. present the itinerary in a clear format best suited to the traveller's needs
10. make and confirm booking arrangements
11. prepare and confirm an appointment profile with both the traveller and the persons that he/she is meeting
12. clarify and confirm specific travel requirements within designated timelines
13. organise and confirm all relevant financial arrangements in line with enterprise procedures and policies

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, training records, workplace documents. The candidate must have access to appropriate documentation and resources normally found in the work environment. 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

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0392C: Transcribe and produce text from audio and notes

Unit Descriptor:

This unit covers taking notes from an oral, printed or recorded sources and producing an accurate text.

ELEMENTS

PERFORMANCE CRITERIA

Candidates must be able to:

1.	Prepare for audio/notes transcription	1.1	Organizational requirements relating to style, presentation and storage of texts are identified prior to commencing the task.
		1.2	The purpose and requirements of the text are clarified with the author.
		1.3	Notes are recorded with the required degree of accuracy.
		1.4	Meaning and spelling of names or technical terms are clarified to ensure accuracy of the notes.
		1.5	Notes are self-checked for accuracy.
2.	Transcribe notes/audiotape	2.1	Text is produced from notes/audiotape to the required degree of accuracy and reflects the intended meaning of the author.
		2.2	Text is produced within designated timelines.
		2.3	Text is produced from transcription with the required accuracy.
		2.4	The meaning of unclear speech is predicted from the context and/or clarified with the author/s.
		2.5	Meaning and spelling of names or technical terms are clarified to ensure accuracy of the text.
		2.6	Transcription is self-checked for accuracy.
3.	Edit and revise text	3.1	Draft text is proof-read for content and accuracy to ensure that they met required standards.
		3.2	Corrections are effected against details recorded to ensure consistency and accuracy.
		3.3	Final text is self-checked for accuracy, and grammar and syntax are appropriate for the intended purpose and audience of the text.

- 3.4 Text is revised, formatted, named, stored and printed in accordance with organizational and task requirements.

RANGE STATEMENT

All range statements must be assessed

1. Designated timelines for production of text may include:
 - timeline agreed with supervisor/person requiring text
 - organisation timeline, e.g. minutes of meeting/agenda
2. Required degree of accuracy may include:
 - capturing intended meaning of dictation
 - complete record (no omissions)
3. Self-checking notes for accuracy may include:
 - reading over notes for meaning
 - checking correlation between source and notes
 - inserting punctuation
 - clarifying names, addresses and specific spelling with information on file
4. Required degree of accuracy of text may include:
 - correct spelling
 - correct grammar
 - intended meaning
 - correct use of technical vocabulary
 - capturing the intended meaning of the dictation
5. Designated timelines for production of text may include:
 - timeline agreed with supervisor/person requiring text
 - organization timeline e.g. minutes of meeting/agenda
6. Audio transcription may include:
 - dictation machine / dictaphone
 - audiotape
 - micro-cassette
7. Purpose of document may include:
 - formal or informal letters
 - memo
 - report
 - agenda
 - minutes
 - verbatim record of meeting
8. Self-checking transcription for accuracy may include:
 - inserting punctuation
 - clarifying names, addresses and specific spelling with information on file
9. Self-checking of text may include:
 - checking spelling
 - checking grammar
 - checking intended meaning
10. Organizational requirements may include:
 - organizational format
 - number of copies
 - author's instructions

11. Requirements of audio transcription may include:

- verbatim record of dictation

12. Note taking tips include:

- create an outline
- record decisions or notes on action items
- ask for clarification if necessary
- don't try to capture it all
- record it

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the formats and styles of workplace documents
2. What are the types of oral and printed sources
3. What are the recording information and
4. confidentiality requirements
5. What are the common terminologies (jargons and
6. technical language) used
7. What are the transcription protocols
8. What are the principles of records management in storing and preserving minutes
9. How to clarify intended meaning with dictated source
10. How to proofread and edit own notes
11. How to use communication skills to predict words from context, interpret intonation and stress
12. How to apply retention skills
13. How to relate to people from a range of social, cultural, ethnic backgrounds and physical and mental abilities]
14. How to record/take notes quickly, accurately and efficiently

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. Use conventional and other abbreviations and symbols.
- b. Produce final text that meets identified purpose and requirements of the organization
- c. proof-read for content and accuracy
- d. Effect corrections against recorded details
- e. Revise, format, name, store and print text in accordance with organizational and task requirements
- f. Produce text from transcription with the required accuracy
- g. Organizational requirements relating to style, presentation and storage of texts are identified

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD1392A

Develop minute-taking and production techniques and meeting protocol skills

Unit Descriptor:

This unit deals with providing the knowledge, skills and attitude required to produce concise and coherent minutes of meetings to enhance the accuracy and posterity of information to aid in the decision making process within the organization.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | |
|----|-----------------------|--|
| 1. | Prepare for meetings | 1.1 Purpose and type of meeting are clarified with the relevant personnel. |
| | | 1.2 Appropriate personnel are notified of meeting |
| | | 1.3 The meeting cycle and attendant activities are properly executed and within stipulated guidelines |
| | | 1.4 Checklist for essential preparation for meeting is established |
| 2. | Create meeting agenda | 2.1 The type of meeting is established |
| | | 2.2 Agenda items are agreed on with relevant personnel if required |
| | | 2.3 Accurate terminologies and agenda outline are used |
| | | 2.4 Previous minutes of meeting and other organizational documents are used to set the agenda for the upcoming meeting |
| | | 2.5 Agenda items are correctly placed on the agenda listing. |
| | | 2.6 Agenda is distributed to appropriate personnel within established timeline |
| 3. | Take Minutes | 3.1 Purpose and type of minutes are clarified with the relevant personnel |
| | | 3.2 Appropriate note/minute taking technique suitable for the organization is established. |
| | | 3.3 Accurate terminologies and minute format are used when reproducing minutes |

- | | | |
|----|----------------------------|---|
| | 3.4 | Common terminologies (jargons and technical language) are recorded in minutes in keeping with organizational operations |
| | 3.5 | Notes are recorded with the required degree of accuracy |
| | 3.6 | Technical terms/terminologies are clarified to ensure accuracy of the notes and sequence of events/occurrences |
| | 3.7 | Role and relationship of the minute-taker and the chair are established in keeping with organization preference |
| | 3.8 | Appropriate note/minute taking device is clarified and agreed on by the organization or relevant personnel |
| | 3.9 | Material (information) to be recorded versus not to be recorded at meeting are clarified by the chair |
| 4. | Transcribe/Produce Minutes | 4.1 Recorded minutes are accurately typed within the agreed timeline |
| | | 4.2 Minutes are prepared using correct tone and professional language |
| | | 4.3 Draft minutes are distributed to chair for amendments within established timelines if required |
| 5. | Revise/Redraft Minutes | 5.1 Draft minutes are proof-read for content and accuracy to ensure that they met required standards |
| | | 5.2 Correction to minutes are effected against details recorded to ensure consistency and accuracy |
| 6. | Develop Action Plan/Sheet | 6.1 Final minutes are produced |
| | | 6.2 Accurate and appropriate action plans/sheets are created using approved minutes in keeping with organizational established format |
| | | 6.3 The minutes and action plan/sheet are distributed to the relevant personnel |

RANGE STATEMENTS

All Range Statements must be assessed.

- | | | | |
|----|---|---|--|
| 1. | Meeting cycle includes: | 7 | Notes include those taken by: |
| | <ul style="list-style-type: none"> • pre-meeting activities • meeting activities • post-meeting activities | | <ul style="list-style-type: none"> • hand (shorthand or speedwriting) • audiotapes |

2. Relevant personnel include:
 - members of staff
 - person appointed to head the meeting
 - clients
3. Degree of accuracy of minutes may include:
 - correct spelling
 - correct grammar
 - timeline agreed with supervisor/chair
 - correct technical vocabulary/terms
4. Action plan/Sheet may include:
 - schedule of the decisions taken at meeting that require follow up and action by designated meeting participants
 - names of persons assigned to follow-up
5. The type of information to be recorded at the meeting usually includes:
 - date and time of the meeting
 - names of the meeting participants and those unable to attend (e.g., “regrets”)
 - acceptance or corrections/amendments to previous meeting minutes
 - decisions made about each agenda item, for example:
 - actions taken or agreed to be taken
 - next steps
 - voting outcomes – e.g., (if necessary, details regarding who made motions; who seconded and approved or via show of hands, etc.)
 - motions taken or rejected
 - items to be held over
 - new business
 - next meeting date and time
8. Person conducting meeting may include:
 - chairman
 - person assigned to deputize for the appointed chair
 - managers
9. Designated timelines for production of minutes may include:
 - organization timeline
 - correct content and meaning
10. The minutes writing process includes:
 - try to write the minutes as soon after the meeting as possible while everything is fresh in the mind
 - review the outline and if necessary, add additional notes or clarify points raised
 - check to ensure all decisions, actions and motions are clearly noted
 - check for sufficient detail
 - edit to ensure brevity and clarity, so the minutes are easy to read
11. Minutes taking equipment and materials include:
 - tape recorder
 - laptop
 - notebook
 - I pod
 - pen pencil
 - diary

6. Note taking tips include:

- create an outline
- record decisions or notes on action items
- ask for clarification if necessary
- don't try to capture it all
- record it

12. Effective minutes include:

- be objective
- write in the same tense throughout
- avoid using people's names except for motions or seconds
- avoid inflammatory or personal observations
- if there is need to refer to other documents, attach them in an appendix or indicate where they may be found (don't rewrite their intent or try to summarize them)

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the confidentiality requirements
2. What are the common terminologies (jargons and technical language) used in meetings based on Roberts Rule of Order
3. What are the meeting protocols
4. What are the records management in storing and preserving minutes
5. How to manage tasks within specified timelines
6. How to engage in follow-up activities from meetings
7. How to conduct quality checks
8. edit
9. proofread
10. correct errors
11. How to listen keenly and record events in the meeting in a logical, accurate order
12. How to record/take notes at meeting quickly, accurately and efficiently

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. communication using correct written language, tense and courtesy
- b. adhere strictly to Roberts Rule of Order
- c. prepare for and co-ordinate meeting procedures
- d. created action plans/sheets in keeping with organizational established format
- e. model high standards of performance

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBRKG0043B: Manage and monitor business records system

Unit Descriptor:

This unit describes the work involved in setting the operational frameworks for all record creation, capture, use and monitoring activities within the business or records system of a specific business domain. It may also be used to review these frameworks and activities.

ELEMENTS

PERFORMANCE CRITERIA

Candidates must be able to:

- | | | | |
|----|---|-----|---|
| 1. | Develop key performance indicators for record-keeping activities including compliance with system rules, standards and procedures | 1.1 | Measurable performance indicators are developed for record-keeping activities from the strategic plan in conjunction with those who will undertake the specific tasks. |
| | | 1.2 | The record-keeping responsibilities of individual personnel/organisational units are identified and documented. |
| | | 1.3 | Acceptable range of variation for compliance is determined based upon record-keeping responsibilities, the applicable records management system and the organisation's risk management analysis. |
| 2. | Designate records use and maintenance responsibilities | 2.1 | Responsibilities for records use and maintenance activities are designated to staff in accordance with organisation policies and the abilities of individual staff. |
| | | 2.2 | Performance targets are set within the parameters of the record-keeping strategic plan. |
| | | 2.3 | Resources for the approved budget period are allocated in accordance with policies and strategic plan. |
| 3. | Develop monitoring methodology | 3.1 | The methodology for monitoring the business or records system's rules, standards and procedures is developed based upon organisational policies, strategies and the records management system technology. |
| | | 3.2 | The methodology developed includes the time-frames involved, means of surveillance, and form of reporting. |

- | | | |
|--|-----|---|
| | 3.3 | The methodology, performance criteria and the ranges of variation from the standards and rules are submitted to the appropriate individual/body for approval. |
| 4. Monitor a business or records system | 4.1 | Monitoring is undertaken in accordance with approved time-frames and frequency and staff being monitored are notified in accordance with organisational policies and guidelines, where applicable. |
| | 4.2 | Any variation from the business or records system's rules, standards and procedures that exceed the agreed limit is noted and details of the situation recorded. |
| | 4.3 | Where required, reports are provided to the appropriate authority relating to records use and maintenance, and are in the required format, and at the required intervals. |
| 5. Identify and respond to problems and changes | 5.1 | Problems and changes requiring a systemic response are identified from the monitoring of reports and external events. |
| | 5.2 | Recommendations are made for revisions to systems, procedures, and future plans (strategic forces in response to identified variations, changes and problems). |
| | 5.3 | Where they are required, amendments to systems are devised, and implementation planned, in response to problems and changes that require a systemic response. |
| | 5.4 | Recommendations for system amendments, and the planning and implementation required, are prepared and approval sought from the appropriate person or body. |
| | 5.5 | Procedures for using the business or records systems, and subsequent alterations and amendments to the procedures are authorised, ensuring that performance indicator parameters and access rules are adhered to. |
| 6. Designate records creation and capture responsibilities | 6.1 | Responsibilities for record creation and capture activities are designated to staff in accordance with organisational policies. |
| | 6.2 | Records creation and capture performance targets are set within the parameters of the record-keeping strategic plan. |
| | 6.3 | Resources for the budget period are allocated in accordance with organisational policies and strategic plan. |

RANGE STATEMENT

All range statements must be assessed

1. Legislation, codes and national standards relevant to the workplace which may include:
 - award and enterprise agreements and relevant industrial instruments
 - relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, industrial relations
 - relevant industry codes of practice
2. Identification and documentation of record-keeping responsibilities is based on:
 - the organisation's responsibility and accountability analysis
 - the system's rules, standards and procedures
3. Appropriate individual/body for approvals may be:
 - board of directors
 - chief executive officer
 - nominated senior management representative
 - business owner
 - senior management team
 - external public authority
 - record-keeping professional(s)
 - delegated individual
 - audit committee
4. Reports on the business or records system may provide input to the next planning cycle for both annual record-keeping program(s) may be and for the record-keeping strategic plan, and may be about:
 - records use
 - compliance
 - maintenance
 - record creation
 - record capture
 - record disposition
5. Monitoring may relate to:
 - a single records management system
 - a number of systems
6. Within a system, monitoring may include:
 - broad accumulation and growth monitoring
 - examining titling and indexing at item level
 - checking spelling
 - observation of localised rules
 - disposition schedule applicability
 - new records specifications

7. Specific objects of monitoring may include:

- compliance with access rules
- security
- actions relating to access to information legislation
- privacy requirements
- specified access restrictions in the public sector
- audit trail or log of users and activity in systems
- compliance with disposition procedures
- retention of records according to schedule
- records of authorisation of destruction
- quality of record-keeping
- storage standards maintenance
- correct use of spelling, spacing and numbering
- changes in use of classification and indexing terms
- copyright legislation
- volumes of actions or accumulations of records above or below anticipated levels
- failures in tracking or increases in lost items
- disparity, scheduling difficulties or gaps in retention and disposition schedule coverage
- space shortages
- disputes arising from any matters, particularly access questions
- legal precedents requiring changes to system(s)
- scanned clarity of images
- reliability of optical character and optical mark recognition techniques
- input of metadata requirements

8. Systems may be:

- current record systems
- archival control systems
- business systems (which generate records)
- storage facilities systems

9. Performance indicators relate to:

- parameters for tracking of records
- retrieval and access (security and access rules, response to request time limits, service levels for requests)
- disposal (percentage of records, unsentenced records, overdue for disposition action, functions/records not covered by disposition schedules)

10. Means of surveillance may include:

- real-time observation (scrutiny of process)
- examination of results (records)
- statistical reports

11. Variations from the agreed limitations may include:

- increases or decreases in the use of particular technologies
- variations within the agreed limit but which are
- consistent
- variations from the business or records
- system's performance or capacity

12. Approved methodology may include:

- methods of preserving privacy
- timeframes, frequency, and forms of monitoring and reporting
- real-time observations (scrutiny of process)
- examinations of results (records)
- statistical reports
- selected snap-shots of the system
- compliance with the organisation's rules for monitoring staff
- methods of preserving privacy

14. Systemic changes may include:

- new classification and controlled language
- new disposition classes or retention periods
- new legal liabilities and other risks identified requiring changes to records specifications
- migration of systems
- bulk movement of records to control
- new organisational or business unit functions
- amendment to the classification system

16. Rules may be devised for:

- the identification of record creators
- negotiating transfer of custody or ownership
- the generation and allocation of unique identifiers to record items
- the naming/titling of items
- the classification and indexing of items
- the allocation of access/security status
- identification and record of disposition status
- the location and tracking of items
- links between record items
- recording the use history of items
- capturing structural and contextual metadata

13. Problems and changes may include:

- changes in administrative functions/activities
- changes to organisational structures
- legislative or other regulatory changes
- changes of government
- takeovers, amalgamations or relocation
- closures and bankruptcy
- outsourcing and privatisation
- case-law precedents
- technological change and implementation

15. Matters recommended for revision may include:

- classification and indexing schemes
- records specifications
- disposition schedules
- storage projections and requirements

17. Recommendations for remedial action may include:

- changes to/enforcement of procedures
- disciplinary action
- counselling of non-conforming individuals/business units

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the organisation's rules for the capture of, access to use and maintenance of records
2. What are the organisation's classification scheme and language
3. What are the record-keeping, standards, principles, process and functional requirements
4. What are the performance management principles and processes
5. What are the workflow and business process re-engineering principles and practices
6. How to analyse process functions and problems
7. How to analyse and synthesize documentation, verbally delivered information prepare, compile and write complex documents and reports
8. communicate complex relationships and processes effectively to users and management
9. How to negotiate to achieve suitable results for the organisation's record-keeping practices
10. How to audit and monitor use of the business or records system

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- a. Demonstrated ability to identify critical indicators of the system's performance appropriate to the organisational context
- b. Demonstrated ability to respond to problems with, or changes to the management of the system's performance

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0683B: Use and maintain electronic mail system

Unit Descriptor:

This unit is related to e-correspondence policies and the maintenance of the electronic mail system in organizations.

ELEMENTS		PERFORMANCE CRITERIA	
Candidates must be able to:			
1.	Access and organise electronic mail	1.1	Urgent mail is identified, prioritised and dealt with first in accordance with organisational requirements.
		1.2	Suspicious or potentially dangerous electronic mail is identified and handled in accordance with organisational requirements and information/warnings/remedial action is conveyed to work team.
		1.3	Electronic mail is checked for completeness, opened or forwarded in accordance with organisational policy and procedures relating to confidentiality.
		1.4	Returned email is dealt with in accordance with organisational policy and procedures.
2.	Initiate and respond to electronic mail	2.1	Messages are prepared in accordance with organisational protocols for language, tone and format.
		2.2	Content, structure and recipient address/es for electronic mail are checked for accuracy and any attachments identified and prepared in accordance with organisational and service provider requirements.
		2.3	Electronic mail is dispatched in accordance with organisational requirements within required timeframes.
3.	Maintain housekeeping system	3.1	Electronic mail and/or attachments are copied or stored in accordance with organisational requirements.
		3.2	Electronic mailing lists are prepared and maintained in accordance with organisational requirements.
		3.3	Inboxes are emptied and electronic mail is archived or permanently deleted in accordance with organisational requirements.

RANGE STATEMENTS

All range statements must be assessed

1. Organisational protocols may include:
 - net etiquette
 - net ethics
 - form of address
 - formality / informality of language, tone and structure
 - length of emails (i.e. short and to the point)
 - concise, relevant subject line
 - carbon copies or blind carbon copies
 - original message in the reply
 - sender's name and address
 - electronic signature
2. Suspicious or potentially dangerous electronic mail may include:
 - unsolicited mail containing viruses
 - spam (unsolicited commercial email or junk mail)
 - mail where sender is unknown and subject line is enticing and/or personal (e.g. urging the receiver to open immediately)
 - attachments
 - particular file extensions
3. Industry codes of practice and must include:
 - copyright laws
 - defamation laws
 - privacy legislation
 - intellectual property, confidentiality requirements
 - legal and regulatory policies affecting e-business
4. Dealing with returned (bounced) email may include:
 - checking email address
 - checking size of attachment/s
 - re-sending
 - sending message by other means e.g. facsimile, post
 - telephoning addressee
 - check with ITC Dept
5. Legislation, codes and national standards relevant to the workplace may include:
 - award and enterprise agreements
 - national, requirements especially in regard to occupational health and safety
6. Mailing lists may include:
 - electronic address books
 - database or spreadsheet records
 - word-processing tables or data files
7. Checking for accuracy should include:
 - clarity of intended meaning
 - spelling
 - grammar
 - punctuation
8. Storage of electronic mail may include:
 - within electronic mail application software
 - specialised record keeping, spreadsheet or database software
 - paper-based filing system

9. Net etiquette includes the following actions and attitudes:
- observing codes of conduct or codes of practice such as those used by discussion groups
 - remembering you're dealing with real people not computers
 - if you wouldn't do it in real life don't do it in cyberspace
 - adjusting to the style and tone of discussion groups
 - respect for other's time and bandwidth
 - looking good online (spelling, grammar, and something worth saying)
 - sharing expert knowledge
 - keeping flames under control (flaming is making personal attacks on others)
 - respecting other people's privacy
 - not abusing your power
 - being forgiving of other's mistakes
10. Preparing attachments may include:
- dealing with large attachments especially picture files
 - considering the limitations when sending large files
 - checking that file size will negotiate the service provider's gateway
 - separating large documents into a number of files
 - compressing files
11. Dispatching email may include:
- single receiver
 - group email
 - carbon copies
 - blind carbon copies
 - email bulletin board or discussion list

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. what are the relevant legislation from all government agencies that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. what are the organisation's policies and procedures relating to electronic mail
3. what are the service provider requirements especially with regard to email attachments
4. what are the naming protocols for email addresses
5. what are the electronic file handling (saving, copying, moving, deleting)
6. what are the occupational safety and health requirements for working with computer technology
7. what are the electronic mail system
8. what are the relevant codes of practice or codes of conduct
9. how to apply computer technology skills to use email
10. how to compose and check accuracy of messages, and follow policies and procedures
11. how to refer information to supervisors or peers especially in dealing with suspicious or potentially dangerous electronic mail
12. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- a. Integrated demonstration of all elements of competency and their performance criteria.
- b. Knowledge of the organisation's policies and procedures relating to electronic mail.
- c. Knowledge of service provider requirements.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0643B: Apply the principles of confidentiality and security

Unit Descriptor:

This unit covers the use of ethical behaviour when dealing with sensitive and confidential information in an organization. It is essential that these behaviours govern all aspects of work in an

ELEMENTS

PERFORMANCE CRITERIA

Candidates must be able to:

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|----|---------------------------------------|-----|---|
| 1. | Work within accepted codes of conduct | 1.1 | Work is reviewed and approved by the supervisor who delegated the task/s. |
| | | 1.2 | Paperwork is kept up to date and reports on the progress of matter/s are forwarded to clients regularly according to instructions and relevant legislation and organization policy. |
| | | 1.3 | Conflict of interest or potential conflict of interest in any matter is promptly communicated to the person responsible for the department. |
| | | 1.4 | Care is taken to behave with honesty and integrity at all times |
| | | 1.4 | Clients and fellow workers are treated with respect. |
| 2. | Follow confidentiality procedures | 2.1 | Information is assessed with regard to what is and what is not disclosable. |
| | | 2.2 | Client-related matters are discussed only within the confines of the organization and with appropriate personnel. |
| | | 2.3 | Confidentiality procedures relative to user name, password and security questions are maintained. |
| | | 2.4 | Discretion and judgement are used in all communications. |

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| 3 | Follow security procedures | 3.1 | Discussions relating to client/customers matters are held in a private location |
| | | 3.2 | File related information is stored and secured appropriately. |
| | | 3.3 | All documents relating to a file are locked away securely after use according to organization policies and procedures. |
| | | 3.4 | All materials required by legislation to be stored for certain periods of time are labelled clearly and stored securely according to organization policies and procedures. |
| | | 3.5 | Back copies are made where possible and filed according to legislation, policy and procedures |
| | | 3.6 | Security procedures are followed for the handing over of documents, files, reports and other confidential information. |

RANGE STATEMENTS

All range statements must be assessed

1. Codes of conduct may include:

- maintaining confidentiality
- duty of care
- ethical behaviours
- privacy
- non-discriminatory practice
- conflict of interest
- use of company property
- compliance with reasonable direction
- sign-in /sign-out procedures

2. Non-disclosable information may include:

- names of clients or staff
- addresses of clients or staff
- telephone numbers of clients or staff
- information relating to a client's business matter
- firm's client database
- whereabouts of client
- financial information
- sensitive details about the firm itself
- passwords or security procedures
- nature of client's business matter
- fact that the client/customer has consulted the firm

- | | |
|--|--|
| <p>3. Conflict of interest may exist where but not limited to:</p> <ul style="list-style-type: none"> • an executive or support person has a personal, financial or other interest in the organization • a legal practitioner and client are in business together • a legal practitioner simultaneously represents two clients whose interests are adverse to one another • the legal stance of one client is detrimental to the business activities of another client | <p>4. Electronically stored information may include but not limited to:</p> <ul style="list-style-type: none"> • on-line (e-mail or web) • on computer hard-drive or floppy disc, jump drive • on voice mail • on audio-cassette • compact discs • dvd's • cameras • photographs |
|--|--|

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the situations that involve conflict of interest or potential conflict of interest
2. What are the retention period for records
3. What information in the organization are disclosable/indisclosable
4. How to identify records that contain confidential information

EVIDENCE GUIDE

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

(1) Critical Aspects of Evidence

- a. where the level of confidentiality required in a situation is unclear, clarification is sought from the appropriate person before any information is divulged
- b. the legal context of conflict of interest is understood
- c. the organization's security procedures are understood and followed
- d. electronic and paper-based confidential information are handled according to a firm's policies and procedures
- e. file-related matters stored electronically are secured when the operator is absent
- f. breaches of confidentiality, security and conduct (own and others) can be identified and standard resolutions to these breaches can be explained
- g. assistance and advice is provided to co-workers where appropriate
- h. evidence of knowledge of own scope of responsibility and roles and responsibilities of relevant others

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0573B: Develop work priorities**Unit Descriptor:**

This unit covers the skills and knowledge required to plan own work schedules, monitor and obtain feedback on work performance and development.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

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|----|-------------------------------------|-----|--|
| 1. | Plan and complete own work schedule | 1.1 | Workgroup plans are prepared to reflect consideration of resources, client needs and workgroup targets. |
| | | 1.2 | Work objectives and priorities are analysed and incorporated into personal schedules and responsibilities. |
| | | 1.3 | Factors affecting the achievement of work objectives are identified, contingencies established and incorporated into work plans. |
| | | 1.4 | Business technology is used efficiently and effectively to manage and monitor the planning, completion and scheduling of tasks. |
| 2. | Monitor own work performance | 2.1 | Personal performance standards are identified and analysed through self-assessment and feedback from others on the achievement of work objectives. |
| | | 2.2 | Feedback on performance is actively sought from colleagues and clients and evaluated in context of individual and group requirements. |
| | | 2.3 | Variations in the quality of service and products are routinely identified and reported in accordance with organisational requirements. |
| 3. | Coordinate professional development | 3.1 | Personal knowledge and skills are assessed against competency standards performance descriptions to determine development needs and priorities. |
| | | 3.2 | Opportunities for improvement and sources of learning are researched and planned in liaison with colleagues. |

- 3.3 Feedback is used to identify and develop ways to improve competence within available opportunities.
- 3.4 New skills are identified and professional development activities are accessed and completed to facilitate continuous learning and career development.
- 3.5 Records and documents relating to achievements and assessments are stored and maintained in accordance with organisational requirements.

RANGE STATEMENT

All range statements must be assessed

1. They may use legislation, codes and national standards relevant to the workplace including:
 - relevant legislation from all
 - government agencies that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
 - relevant industry codes of practice
2. Workgroup plans may include:
 - sales plans
 - reporting plans
 - production plans
 - budgetary plans
 - team participation
 - work schedules
 - team and individual learning goals
3. Factors affecting the achievement of work objectives may include:
 - competing work demands
 - technology/equipment breakdowns
 - unforeseen incidents
 - personnel
 - environmental factors such as time, weather, etc
 - resource and materials availability
 - budget constraints
4. Work objectives may include:
 - sales targets
 - reporting deadlines
 - production targets
 - budgetary targets
 - team participation
 - team and individual learning goals

5. Feedback on performance may include:
 - formal/informal performance appraisals
 - obtaining comments from supervisors and colleagues
 - obtaining comments from clients
 - personal reflective behaviour strategies
 - routine organisational methods for monitoring service delivery
6. Competency standards are standards which measure:
 - all those personal and technical knowledge, skills and attitudinal aspects (competencies) required to effectively and efficiently undertake the day-to-day tasks and duties of the practitioner's work function
7. Organisational requirements may be included in:
 - quality assurance and/or procedure manuals
 - goals, objectives, plans, systems and processes
 - legal and organisational policies, guidelines and requirements
 - business and performance plans
 - access and equity principles and practice
 - ethical standards
 - Occupational Health and Safety policies, procedures and programs
 - quality and continuous improvement processes and standards
 - defined resource parameters
8. Professional development activities may include:
 - coaching, mentoring and/or supervision
 - formal/informal learning programs
 - internal/external training provision
 - work experience/exchange/opportunities
 - personal study
 - career planning/development
 - performance appraisals
 - workplace skills assessment
 - recognition of prior learning
9. Business technology may include:
 - computers
 - computer applications
 - personal schedules/desk organisers
 - modems
 - scanners
 - email and internet/intranet/extranet
 - photocopiers
 - facsimile machines
 - printers
 - jump drives
 - adding machines

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. what are the organisation's policies, plans and procedures
2. what are the methods to elicit, analyse and interpret feedback
3. what are the techniques to prepare personal plans and establish priorities
4. what are the quality standards for products and services
5. what are the relevant business technology applications
6. what are the methods to evaluate own performance
7. what are the processes to interpret competency standards and apply them to self
8. what are the methods to identify and prioritise personal learning needs
9. what are the range of professional development activities and the criteria necessary to choose the appropriate one
10. how to explain the organisation's policies and procedures
11. how to interpret competency standards
12. how to use a variety of strategies for planning and reviewing own work
13. how to solve problems relating to skills and to develop contingency plans
14. how to use evaluation skills for assessing outcomes
15. how to elicit constructive feedback on development needs
16. how to select and use technology appropriate to a task
17. how to use time management skills to complete tasks within agreed timeframes
18. how to identify opportunities for learning and development
19. how to participate in the integration process as a member of a work team
20. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- a. Preparing and communicating work plans.
- b. Scheduling work objectives and tasks to support the achievement of goals.
- c. Seeking and acting on feedback from clients and colleagues.
- d. Reviewing own work performance against achievements through self-assessment.
- e. Accessing learning opportunities to extend own personal work competencies.
- f. Using business technology to monitor self-development.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0763B: Coordinate implementation of customer services strategies**Unit Descriptor:**

This unit covers the skills and knowledge required to advise on, and carry out customer service strategies, and evaluates satisfaction on the basis of feedback and design strategies for improvement.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

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|----|---|-----|--|
| 1. | Advise on customer service needs | 1.1 | Customer service needs are clarified and accurately assessed using appropriate communication techniques. |
| | | 1.2 | Problems matching service delivery to customers are diagnosed and options for improved service are developed within organisational requirements. |
| | | 1.3 | Advice is relevant, constructive and promotes the improvement of customer service delivery. |
| | | 1.4 | Business technology is used to structure and present information on customer service needs. |
| 2. | Support implementation of customer service strategies | 2.1 | Customer service strategies and opportunities are promoted to designated individuals and groups. |
| | | 2.2 | Available budget resources are identified and allocated to fulfil customer service objectives. |
| | | 2.3 | Procedures to resolve customer difficulties and complaints are dealt with promptly within organisational requirements. |
| | | 2.4 | Coaching and mentoring assistance is provided to colleagues to overcome difficulties in meeting customer service standards. |
| | | 2.5 | Decisions to implement strategies are taken in consultation with designated individuals and groups. |

- | | |
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| 3. Evaluate and report on customer service | 3.1 Client satisfaction with service delivery is reviewed using verifiable data in accordance with organisational requirements. |
| | 3.2 Changes necessary to maintain service standards are identified and reported to designated groups and individuals. |
| | 3.3 Conclusions and recommendations are prepared from verifiable evidence and provide constructive advice on future directions of client service strategies. |
| | 3.4 Systems, records and reporting procedures are maintained to compare changes in customer satisfaction. |

RANGE STATEMENTS

All range statements must be assessed

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| 1. Legislation, codes and national standards relevant to the workplace, which may include: | 3. Communication techniques may include: |
| <ul style="list-style-type: none"> • award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice | <ul style="list-style-type: none"> • consultation methods, techniques and protocols • analysing customer satisfaction surveys • conducting interviews • questioning • summarising and paraphrasing • seeking feedback to confirm understanding • making recommendations • obtaining management decisions • analysing quality assurance data |
| 2. Customer needs may relate to: | 4. Customers can be: |
| <ul style="list-style-type: none"> • advice or general information • specific information • further information • making an appointment • complaints • purchasing organisation's products and services • returning organisation's products and services • accuracy of information • fairness/politeness • prices/value | <ul style="list-style-type: none"> • internal or external • other agencies • individual members of the organisation • corporate customers • individual members of the public |

5. Organisational requirements may include:
- quality assurances and/or procedures manuals
 - goals, objectives, plans, systems and processes
 - legal and organisational policy/guidelines and requirements
 - occupational health and safety policies, procedures and programs
 - confidentiality and security requirements
 - anti-discrimination and related policy
 - access and equity principles and practice
 - ethical standards
 - quality and continuous improvement processes and standards
 - defined resource parameters
 - who is responsible for products or services
 - pricing and discount policies
 - replacement and refund policy and procedures
 - payment and delivery options
6. Business technology may include:
- photocopier
 - computer
 - internet /intranet
 - printer
 - binder
 - shredder
 - answering machine
 - fax machine
 - telephone
7. Designated individuals and groups may include:
- supervisor
 - customers
 - colleagues
 - external organisation
 - committee
 - line management
8. Procedures to resolve customer difficulties may include:
- using conflict management techniques
 - refund of monies
 - item replacement
 - referrals to supervisor
 - review of products or services
 - external agencies (e.g. Ombudsman, Consumer Affairs Commission)
9. Customer complaints may include:
- damaged goods or goods not delivered
 - administrative errors such as incorrect invoices or prices
 - warehouse or store room errors such as incorrect product delivered
 - service errors
 - delivery errors
 - products not delivered on time
 - customer satisfaction with service quality
10. Customer service strategies may include:
- delivery times
 - price offers
 - product/service availability
 - product/refund guarantees
 - merchandise characteristics
 - courtesy/politeness

11. Coaching and mentoring assistance may include:

- providing feedback to another team member
- fair and ethical practice
- non-discriminatory processes and activities
- respecting the contribution of all participants and giving credit for achievements
- presenting and promoting a positive image of the collective group
- problem solving
- providing encouragement

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the principles of customer services
2. What are the organisation's business structure, products and services
3. What are the understanding the organisation's policy and procedures for customer service including handling customer complaints
4. What are the product and service standards and best practice models
5. What are the common problems relating to customer service
6. What are the consultation methods, techniques and protocols
7. What are the techniques for dealing with customers with special needs
8. how to plan, develop and implement schedules
9. how to assess effectiveness of customer service strategies
10. how to interpret a variety of texts; prepare information and papers; write formal and informal letters according to target audience
11. how to exercise interpersonal skills to relate effectively to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
12. how to select and use technology appropriate to a task
13. how to use problem-solving skills to diagnose organisational problems relating to customer services
14. how to provide effective recommendations for the enhancement of products or services

EVIDENCE GUIDE

- (1) **Critical Aspects of Evidence**
- a. Identifying needs and priorities of the organisation in delivering services to customers
 - b. Distinguishing between different levels of customer satisfaction
 - c. Providing constructive advice on customer service practices
 - d. Responding to and reporting on customer feedback
 - e. Designing strategies to improve delivery of products and services

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0773B: Research, prepare and present information

Unit Descriptor:

This unit covers the use of a variety of information sources to find requested information. It also covers integrating and presenting the information in a variety of styles.

ELEMENTS		PERFORMANCE CRITERIA	
Candidates must be able to:			
1.	Plan search	1.1	Timelines for completing search are arranged and work is planned.
		1.2	Appropriate information sources for completing the search are identified and procedure for obtaining information from sources is identified and clarified if necessary.
2.	Research, locate and select information	2.2	Clear requirements for the information to be located and researched are agreed and recorded.
		2.3	Information sources that meet the requirements are clearly identified.
		2.4	Condition and/or permission in practicing or making a search and use of the information is established.
		2.5	Available specialist support is used as needed and payment is prepared.
		2.6	Correct use is made of efficient research methods to locate the required information.
3.	Integrate, prepare and supply information	2.7	Information, which meets agreed requirements, is selected and recorded.
		3.1	Agreement is reached and recorded on the integration and presentation of the information.
4.	Receive outcome of search	3.2	Document style chosen is appropriate to the purpose and use of the information.
		4.1	Process of obtaining information is arranged with the appropriate person/official.
		4.2	Self or other is organised to collect information from external agency in the arranged manner.

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| | 4.3 | All records of expense are filed. | |
| | 4.4 | Information is checked to see that it meets identified needs and appropriate follow-up action is taken with assistance if necessary. | |
| 5 | Recognize intellectual property rights | 5.1 | Information and reference sources used are acknowledged in the document or material developed. |
| | | 5.2 | Intellectual property rights and conditions associated with the reference materials are used. |
| 6. | Quality check document | 6.1 | Final documents are quality checked and errors corrected. |
| | | 6.2 | Amendments to document are agreed with person requesting. |
| | | 6.3 | Final document meets with approval of person requesting. |
| 7. | Deliver information | 7.1 | Information is delivered intact to designated person. |
| | | 7.2 | Difficulties are identified and resolved within timelines. |
| | | 7.3 | All activities, actions and outcomes are documented and time is recorded. |

RANGE STATEMENT

All range statements must be assessed

1. Legislation to include:
 - Information Act 2002
 - information searches
 - use of information
 - copyrights and data protection and intellectual property rights
 - intellectual assessment
 - confidentiality of source
2. Information sources to include:
 - paper based
 - libraries
 - reference materials
 - resource persons
 - telephone information services
 - internet facilities
 - computer-based research
 - government agencies
 - data bases
 - credit files
3. Method of data collection to include:
 - interviews (face-to-face)
 - telephone interviews
 - persons internal and external to organization
4. A firm's policies and procedures may include:
 - office procedure manual
 - information sources
 - recording information
 - security/confidentiality/ privacy procedures
 - contingencies in terms of inadequate payment, unavailable information
 - handling money
 - charging of search expenses
5. Standard document styles to include:
 - reports
 - pictorial/graphical
 - tables
 - manual
 - presentation materials
 - correspondence
6. Quality check of document to include:
 - proofreading
 - spell check
 - editing
 - grammar
 - styles and context
 - technical correctness/accuracy of information
7. Requirements to included:
 - length
 - technical details
 - wording
 - diagrams
 - agreement on outcomes
 - figures
 - dates
 - formats
 - stationery
8. Timelines may be contingent upon:
 - court timelines
 - legal practitioner's workload
 - case issues
 - client needs
 - changes in legislation
 - significant dates such as new year, end of financial year
9. Difficulties in meeting timelines may relate to:
 - available resources
 - client needs
 - liaising with others
 - technical difficulties
 - alterations to instructions
 - backlog at supplier's end

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation covering:
 - information searches
 - use of information
 - confidentiality
 - data protection
 - copyrights
2. What are the importance of:
 - acknowledging information source
 - accessing and using specialist
 - support or experts
 - identifying & selecting information
 - that meets agreed requirements
 - agreeing and recording clear requirements
 - maintaining goodwill of source of information
3. What are the roles and responsibilities of internal and relevant external individuals/authorities
4. How to use information sources:
 - paper-based (libraries etc)
 - computer-based (databases, internet etc)
 - telephone information services
 - people internal to or external to the organization
5. How to use research methods including:
 - questionnaires
 - interviews (telephone or person to person)
6. How to conduct quality checks:
 - edit
 - proofread
 - correct errors
7. How to follow legal procedures; follow written and oral sequenced instructions involving legal terminology
8. How to conduct a search such as matching, key word searches, locating specific information
9. How to lodge requests such as providing clear and specific instructions about information required;
10. How to listen to clear sequenced instructions of several steps to complete task; accurate
11. How to use strategies to confirm, repair or clarify understanding of terms and context
12. How to use mathematical knowledge in relation to search fees
13. How to source information using libraries, internet, government information services
14. How to manage tasks within specified timelines
15. How to record keeping efficiently and accurately

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

- a. Research, locate and select information.
- b. Interpret and use legislation pertaining to the use of information sources.
- c. Importance of adhering to timelines can be explained.
- d. Where instructing others, instructions are clear and sufficient and adequate explanation is given.
- e. The purpose of the search can be explained.
- f. The appropriate information sources for obtaining the required information are correctly identified.
- g. On-line information locations are accurately utilised where appropriate.
- h. A variety of information sources is used appropriately.
- i. Trust account funds are accessed according to the firm's procedure and used to pay search fee where appropriate
- j. Record of lodgement is filed and detailed file notes are kept at each step of the search process.
- k. Evidence of knowledge of standard problems and resolutions is demonstrated.
- l. Where difficulties cannot be resolved through standard procedures, the legal practitioner or supervisor is consulted.
- m. Matter identification is attached to appropriate documentation and such documentation is filed correctly.
- n. All work is conducted within accepted codes of conduct including those relating to: maintaining confidentiality, use of company property, duty of care, ethical behaviours, privacy, non-discriminatory practice, conflict of interests and compliance with reasonable direction.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0803B

Co-ordinate business resources

Unit Descriptor:

This unit covers the skills and knowledge required to determine and analyse existing and required resources, their effective application and the accountability for their use.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

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|----|--------------------------------------|-----|--|
| 1. | Determine resource requirements | 1.1 | Resource requirements are determined in accordance with business and operational plans and organisational requirements. |
| | | 1.2 | Opportunities are given to individuals and workgroups to contribute to the identification of resource requirements. |
| | | 1.3 | Resource expenditure is realistic and makes efficient use of available budget resources. |
| | | 1.4 | Recommendations on resource requirements are presented in the required format, style and structure using relevant business equipment and technology. |
| 2. | Acquire and allocate resources | 2.1 | Physical resources and services are acquired in accordance with organisational requirements. |
| | | 2.2 | Resources are checked to ensure quality and quantity in line with service agreements. |
| | | 2.3 | Resources are allocated promptly to enable achievement of work group objectives. |
| | | 2.4 | Consultation with individuals and teams on allocation of resources is participative and is conducted using appropriate interpersonal skills. |
| 3. | Monitor and report on resource usage | 3.1 | The effectiveness of resource planning is measured and assessed against actual costs and identified shortfalls and surpluses. |
| | | 3.2 | Methods of monitoring resource use are developed and implemented to enable timely and accurate reporting against business and operating plans. |

- 3.3 Improvements in resource planning are identified through consultation and feedback and implemented in accordance with organisational requirements.
- 3.4 Records concerning equipment and resource purchases are maintained in accordance with organisational requirements.

RANGE STATEMENTS

All range statements must be assessed

1. Legislation, codes and national standards relevant to the workplace including:
 - award and enterprise agreements and relevant industrial instruments
 - relevant legislation from government agencies that affect business operations, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
 - relevant industry codes of practice
2. Resource requirements may include:
 - technological equipment/software
 - plant/machinery
 - stock and supplies
 - Occupational Health and Safety resources
 - staff amenities
 - human resources
 - training materials
 - storage space
 - location/premises
 - materials for refurbishing
 - raw materials
3. Organisational requirements may be included in:
 - quality assurances and/or procedures manuals
 - goals, objectives, plans, systems and processes
 - legal and organisational policy/guidelines and requirements
 - business and performance plans
 - security and confidentiality requirements
 - management and accountability channels
 - access and equity principles and practice
 - ethical standards
 - occupational health and safety policies, procedures and programs
 - quality and continuous improvement processes and standards
 - defined resource parameters
 - reporting requirements
 - manufacturers' and operational specifications
4. Business equipment/technology may include:
 - photocopier
 - computer
 - printer
 - spiral binder
 - shredder
 - answering machine/voice mail
 - fax machine
 - telephone

Appropriate interpersonal skills may include:

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

5. Feedback sources may include:

- customer/client response data
- employee data
- sales orders
- financial forecasts
- supplier's invoices
- equipment meter readings

6. Records may include:

- computerised or manual
- financial statements
- stock list and inventory control
- purchase orders
- invoices
- maintenance schedules/requests
- order forms
- petty cash forms

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the functions of a range of business equipment
2. What are the common equipment faults
3. What are the principles of designing maintenance schedules for plant, equipment and business technology
4. What are the evaluation processes for resource monitoring
5. What are the records management processes and techniques related to maintenance schedules
6. What are the decision making techniques for allocating resources between competing priorities
7. How to reports and display logical information on resource usage
8. How to diagnose, problems with resource use
9. How to interpret, compare and calculate resource usage costs
10. How to plan/schedule resource use and availability
11. How to analyse/define parameters for resource use

EVIDENCE GUIDE

(1) Critical Aspects and Evidence

Monitoring resource usage to determine resource needs:

- a. maintaining records of resource requirements
- b. identifying and communicating of faults and/or risks to appropriate personnel
- c. calculating costs and expenditures
- d. negotiating with others in relation to access to resources
- e. making decisions for allocating resources between competing priorities

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0813B: Contribute to effective workplace relationships**Unit Descriptor:**

This unit covers the skills and knowledge required to develop, establish and maintain effective workplace relationships and networks. It covers the activities of communication and representation.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | |
|----|--|-----|---|
| 1. | Communicate effectively in the workplace | 1.1 | Information and ideas are expressed clearly and concisely using language appropriate to meet audience needs. |
| | | 1.2 | Appropriate interpersonal skills are used to develop rapport, promote confidence and the accurate exchange of relevant information. |
| | | 1.3 | Individual differences are acknowledged and taken into account in the communication style used. |
| | | 1.4 | Written information is structured, relevant and conveys the intended meaning of the material. |
| | | 1.5 | Written information follows established organisational requirements for style, format and presentation. |
| 2. | Develop and maintain effective relationships | 2.1 | Relationships with colleagues and customers are developed and maintained to promote benefits consistent with organisational requirements. |
| | | 2.2 | Business technology is used to involve and maintain individuals in productive relationships. |
| | | 2.3 | Trust and confidence of colleagues and customers is gained and maintained through demonstration of high performance standards. |
| | | 2.4 | Appropriate interpersonal skills are used to facilitate and promote positive relations. |
| | | 2.5 | Coaching and mentoring assistance is used to promote collaborative solutions to problems. |

- | | |
|--|---|
| 3. Represent the organisation with a range of groups | 3.1 Internal and external fora and meetings appropriate to the organisation are identified and accessed in accordance with organisational requirements. |
| | 3.2 Feedback is used to identify improvements to representational activities within available opportunities. |
| | 3.3 Networking is used to access appropriate representational opportunities. |
| | 3.4 Reports accurately reflect representational activities and evaluate benefits to the organisation of networking. |

RANGE STATEMENTS

All range statements must be assessed

- | | |
|---|---|
| <p>1. They may use legislation, codes and national standards relevant to the workplace including:</p> <ul style="list-style-type: none"> • award and enterprise agreements and relevant industrial instruments • relevant legislation from all government agencies that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice | <p>2. Interpersonal skills may include:</p> <ul style="list-style-type: none"> • using appropriate body language • summarising and paraphrasing • networking • consultation methods, techniques and protocols • seeking feedback from group members to confirm understanding |
| <p>3. Individual differences may include:</p> <ul style="list-style-type: none"> • disabilities • language • beliefs/values • religious/spiritual observances • gender • culture • age • educational background | <p>4. Written information may include but is not limited to:</p> <ul style="list-style-type: none"> • handwritten and printed materials • electronic mail • internal memoranda • briefing notes • facsimiles • general correspondence • marketing materials • telephone messages • minutes of meetings |

5. Organisational requirements may be included in:
- goals, objectives, plans, systems and processes
 - business and performance plans
 - legal and organisational policy/guidelines and requirements
 - access and equity principles and practice
 - ethical standards
 - occupational health and safety policies, procedures and programs
 - quality and continuous improvement processes and standards
 - defined resource parameters
 - awards and enterprise agreements
6. Business technology may include:
- computers
 - computer applications
 - personal schedules
 - e-mail
 - internet/extranet/intranet
 - photocopiers
 - scanner
 - digital camera
 - facsimile machines
7. Coaching and mentoring assistance may include:
- providing feedback to another team member
 - fair and ethical practice
 - non-discriminatory processes and activities
 - respecting the contribution of all participants and giving credit for achievements
 - presenting and promoting a positive image of the collective group
 - problem solving
 - providing encouragement
8. Internal and external fora may include:
- team meetings
 - division meetings
 - professional associations
 - peer groups
 - business social functions
9. Feedback on ways to improve promotional activities may include:
- accuracy and sufficiency of information
 - benefits to organisation
 - impact of message
 - use of media
 - liaison with networks
 - appropriateness of audience
 - participation of competitors

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the principles of effective communication in relation to listening, questioning and non-verbal communication
2. What are the techniques for building relationships of trust
3. What are the principles and techniques associated with negotiation and team work
4. What are the principles and techniques to use feedback to achieve positive outcomes
5. How to use communication skills including receiving feedback and reporting, maintaining effective relationships and conflict management
6. How to apply evaluation skills for assessing benefits of networking
7. How to negotiate to achieve mutually acceptable outcomes
8. How to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- a. Negotiating solutions between groups and individuals
- b. Communicating information clearly to a variety of audiences
- c. Preparing written material in a variety of formats
- d. Presenting the organisation's goals and objectives
- e. Facilitating co-operation between groups and individuals

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report, workplace documents direct observation. Resource for the assessment should include: workplace reference materials such as style guides, computer equipment including word processing software, English dictionary and thesaurus

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0473A: Plan and manage conferences**Unit Descriptor:**

This unit covers planning; promoting and coordinating conferences, ensuring follow-up procedures are incorporated.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | |
|----|--------------------|--|
| 1. | Plan conference | <p>1.1 Purpose, required outcomes and style of conference are confirmed with conference convenor/s.</p> <p>1.2 Conference facilities requirements, budget, and preparation timeline are confirmed with conference convenor/s.</p> <p>1.3 Speakers/presenters are identified and/or a call for papers is prepared in accordance with the purpose and style of the conference.</p> <p>1.4 Conference program is drafted in line with stated purpose, and choice of program elements is balanced to allow outcomes to be achieved.</p> <p>1.5 Speakers are selected, invited and briefed in accordance with the conference program.</p> <p>1.6 Participant target group and projected numbers are identified in consultation with conference organisers.</p> <p>1.7 Conference administration requirements are analysed and tasks, processes and resources planned to ensure efficient management of conference data and resources.</p> |
| 2. | Promote conference | <p>2.1 A promotion strategy is established that reaches required number of target participants.</p> <p>2.2 Publicity material is prepared in accordance with the promotion strategy and budget allocation/s, and despatched within designated timelines.</p> |

3. Organise conference
 - 3.1 Conference arrangements are made in accordance with booking lead times and budget allocation/s.
 - 3.2 Acceptances are recorded, fees receipted and participants confirmed within designated timelines.
 - 3.3 Participants' special needs are identified and catered for.
 - 3.4 Program details are confirmed and conference papers are prepared in accordance with speakers' requirements and conference timeline.
 - 3.5 Pre-conference information is despatched to participants within designated timelines.
4. Coordinate conference proceedings
 - 4.1 Conference facilities are checked to confirm they meet agreed requirements.
 - 4.2 Participants are registered in accordance with planned registration procedures.
 - 4.3 Any late changes to the published program are communicated to participants.
 - 4.4 Contingency arrangements are made to ensure the smooth running of conference.
 - 4.5 Speakers' schedules are managed and their conference requirements met throughout the conference.
 - 4.6 Administration requirements during conference are managed in accordance with conference plan/schedule.
5. Follow-up conference proceedings
 - 5.1 Conference outcomes are recorded, reported and/or followed up in accordance with organisational requirements.
 - 5.2 Conference papers are prepared for publication and distributed within designated timelines.
 - 5.3 Post-conference correspondence is prepared and despatched within designated timelines.
 - 5.4 Receipts and payments are finalised and conference funds acquitted in accordance with organisational procedures and audit requirements.

RANGE STATEMENT

All range statements must be assessed

1. Conference style may be:
 - formal
 - informal
2. Conference purpose may include:
 - marketing of products
 - expanding business contacts
 - training
 - promotion
 - presentation of findings/research
 - networking
 - professional development
 - a mix of the above
3. Conference organiser/s may include:
 - board of management
 - steering committee
 - supervisors/team leaders from different departments
4. Conference administration may include:
 - registration procedures
 - cash management
 - budgetary control
 - preparing evaluation questionnaires
 - a mix of the above
5. Conference facilities may include:
 - room size
 - amenities
 - décor
 - audio-visual equipment
 - electronic whiteboards
 - computer equipment
 - overhead projectors
 - screens
 - flip charts
 - stationery
 - parking
 - catering
 - facilities for the handicapped
6. Budget planning may include:
 - limits set by the enterprise
 - planning tools and resources (eg budget control charts, specific software)
 - calculating the expected cost of each task and arrangement
 - setting conference fees (if any)
 - speakers' fees (if any)
 - calculating any possible profits/deficits
 - registration of TRN Business Number
7. Program elements may include:
 - presentations
 - workshops
 - small groups
 - plenary session/s
 - video
 - demonstrations
 - practice sessions
8. Registration procedures may include:
 - recording participant details
 - issuing name tags
 - issuing conference information kits
 - answering participants' queries
 - directing participants to session locations
 - directing participants to conference facilities

9. Publicity material may include:

- brochures
- flyers
- print advertising
- electronic advertising
- information kits

11. Conference arrangements may include:

- date
- time
- venue
- furniture
- room layout
- equipment
- consumables
- catering
- travel
- accommodation

13. Pre-conference information may include:

- confirmation of registration
- details of travel and accommodation
- pre-reading
- any changes to the conference program originally promoted

10. Contingency arrangements may include:

- alternative suppliers of transport and accommodation
- alternative conference venues
- alternative speakers
- alternative catering suppliers
- additional supplies and resources
- spare sets of documentation
- backup equipment

12. Special needs may include:

- catering requirements
- specific points of access and facilities for people with disabilities
- specific equipment and resources
- accommodation
- relevant documents and reference material
- social/networking activities
- letter/s or gifts of thanks to speakers and contributors
- financial follow-up / finalisation of accounts

14. Promotion strategy may relate to:

- purpose and nature of the conference
- targeting relevant industry groups
- number of participants attending
- date, time and location of the conference
- providing adequate notice and coverage

15. Conference outcomes may include:

- recommendations
- action list/s
- follow-on effects (e.g. increased enterprise profile, increase in enterprise product sales, improved staff performance)
- results of analysis of conference questionnaires
- contribution to organisational reports
- further meetings
- profit/loss

17. Administration requirements may include:

- financial matters
- addressing special needs/preferences of participants
- recording absent participants
- filling in checklists
- directing participants to appropriate rooms
- announcing breaks
- answering queries
- locating additional information/materials as required
- implementing contingency plans
- preparing and distributing conference evaluation questionnaires to participants

16. Post-conference correspondence may include:

- reports to relevant groups and individuals
- letter/s of thanks to speakers and contributors
- financial follow-up / finalisation of accounts

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the budget limitations
2. What are booking arrangements
3. What are methods of obtaining quotations
4. What are planning tools and resources
5. How to prepare general information and papers; write formal and informal letters according to target audience
6. How to take part in communication and sustained complex interpersonal exchanges; liaise with others; listen to and incorporate/encourage feedback; answer questions
7. How to arrange times, dates, venues, transport, accommodation to meet the special needs of participants
8. How to anticipate possible problems and prepare and implement contingency plans
9. How to exercise time management skills to make arrangements within designated timelines; use developed estimating skills to check calculations and outcomes
10. How to relate to people from a range of social, cultural ethnic backgrounds and physical and mental abilities

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. apply knowledge of organisational procedures and protocol for organising conferences
- b. use of appropriate software to plan and manage conference arrangements
- c. confirmed with conference facilities requirements, budget, and preparation timeline
conference convenor/s
- d. identify speakers/presenters and/or prepare a call for papers in accordance with the purpose and style of the conference
- e. select, invite and brief speakers in accordance with the conference program
- f. analyse conference administration requirements and plan tasks, processes and resources to ensure efficient management of conference data and resources
- g. prepare publicity material in accordance with the promotion strategy and budget allocation/s, and despatched within designated timeline
- h. identify and cater for participants' special needs
- i. record acceptances, and confirm participants within designated timelines
- j. confirm program details and prepare conference papers in accordance with speakers' requirements and conference timeline
- k. check conference facilities to confirm they meet agreed requirements
- l. manage speakers' schedules and ensure their conference requirements met throughout the conference
- m. prepare conference papers for publication and distribute them within designated timelines

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to reference material (conference venues, transport, accommodation, catering), necessary conference documentation, relevant contact persons, including speakers, clients and management

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

BSBBAD0833B: Maintain computer files

Unit Descriptor:

This unit covers moving computer files between directories and folders and carrying out backup procedures.

ELEMENTS**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | |
|---------------------------------------|-----|--|
| 1. Carry out file maintenance | 1.1 | Files are copied, deleted and renamed as required. |
| | 1.2 | Directories or folders are created as required. |
| | 1.3 | Security checks and procedures are inserted where necessary. |
| 2. Create and maintain file registers | 2.1 | Files are classified according to enterprise guidelines. |
| | 2.2 | Registers are created and maintained according to enterprise guidelines and standards. |
| 3. Back up files | 3.1 | Backups are carried out as required. |
| | 3.2 | Backup files are stored in the designated manner and location. |
| | 3.3 | Record of backups is maintained. |
| | 3.4 | Virus protection measures are used according to enterprise guidelines. |

RANGE STATEMENTS

All range statements must be assessed

- | | |
|---|---|
| 1. Enterprise guidelines may include: | 2. Security checks and procedures may include: |
| <ul style="list-style-type: none"> • backup procedures • file maintenance • file storage • deleting/renaming procedures • updating file index, cross referencing | <ul style="list-style-type: none"> • storage of data/files • access controls, e.g. passwords, read-only files • installing surge protectors • write-protecting floppy disks |

3. Copying, deleting and renaming files may include:

copying/deleting to and from a range of locations:

- hard disc
- network server
- floppy disc
- Internet
- CD ROM
- jump drive
- DVD

renaming:

- folders
- files

5. Carrying out backups may include:

- identifying files for backup
- frequency at which backup occurs
- responsibility for regular backup
- particular computers/systems

7. Backup record may include:

- system to verify backup completed as scheduled
- exception report

4. Creating directories or folders may include:

- logical and orderly structure of folders
- efficient naming of directories or folders
- insertion of file name and location in document
- storing related files together in common folder

6. Storage of backup files may include:

- external hard disk
- floppy disk
- tape
- CD ROM
- on-site/off-site
- fireproof rooms
- locations away from the office site
- rooms secured against unauthorised entry

8. Virus protection measures may include:

- anti-virus software
- controlling disk usage
- file sharing restrictions
- e-mail attachment restrictions
- spyware

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the enterprise computer filing systems
2. What are the appropriate storage medium
3. What are the functions of file management applications
4. What are virus protection measures
5. What are the enterprise backup policies and procedures
6. How to identify obsolete files
7. How to index and sort files
8. How to sort and classify information
9. How to create and maintain registers
10. Backups are carried
11. How to sort and classify information
12. How to create directories or folders
13. How to copy, delete and rename files

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. copy file either between folders or drives using both keyboard and mouse functions
- b. delete files according to enterprise policies and procedures as necessary
- c. rename files logically according to enterprise policies and procedures
- d. use file management application to create directories and folders
- e. maintain the integrity of the computer filing system
- f. identify backup procedures and create back-up files according to enterprise policies and procedures
- g. label and store backup media according to enterprise policies and procedures
- h. understand and use virus protection measures according to enterprise policies and procedures

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate 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: computer equipment including relevant software, workplace manuals and reference materials such as computer user manuals, company policy and procedural manuals

(3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

GLOSSARY OF TERMS

Occupational Standards

Occupational Standards of competence are industry-determined specifications of performance, which describe the knowledge, skills and attitudes required by a worker in the performance of a particular role in the workplace. They specify what a person should know and do in order to carry out the functions of a particular job in the work environment. They are the building blocks for all activities in a competency-based training and certification system. An Occupational Standard is made up of a qualification plan, a unit title, elements, performance criteria, range statements, underpinning knowledge and skills and evidence guide.

Qualification Plan – The Qualification Plan identifies the Mandatory units which are those units that are necessary to deem a candidate competent in the occupational area and provide flexibility in different work environments. It also contains the Title and Level of the qualification to be awarded.

Unit Title - The unit title is a succinct statement of the outcome of the unit of competency. It reflects the major activities or functions of an individual's work as well as the discreet units of work.

Unit Descriptor - The unit descriptor communicates the content of the unit of competency and the skill area it addresses.

Elements - These are the basic building blocks of the unit of competency. They describe the tasks in which competence should be demonstrated in order to carry out the specific function.

Performance Criteria - These are the descriptions of the outcomes of performance required for successful achievement of an element. They specify the required performance in relevant tasks, roles, skills and applied knowledge that enables competent performance.

Range Statement - This describes the essential operating conditions that should be present in training and assessment, depending on the work situation, needs of the candidate, accessibility of the item and local industry contexts. It lists the parameters in which candidates must demonstrate their competence.

Underpinning Knowledge and Skills – The knowledge identifies what a person needs to know to perform the work in an informed and effective manner. The skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.

Evidence Guide - The Evidence Guide is critical in assessment as it provides information to Training Providers and Assessors about how the described competency should be demonstrated. It provides a range of evidence for the Assessor to make a determination of competence and defines the assessment context. The Evidence Guide describes:

- Conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- Suitable methodologies for conducting assessment including the potential for workplace simulation
- Resource implications, for example access to particular equipment, infrastructure or situations
- How consistency in performance must be assessed over time, various contexts and with a range of evidence

Level 1 – Directly supervised worker

Recognizes competence in a range of varied work activities performed in a variety of contexts. Most work activities are simple and routine. Collaboration with others through work groups or teams may often be a requirement. Substantial supervision is required especially during the early months evolving into more autonomy with time.

Level 2 – Supervised skilled worker

Recognizes competence in a broad range of diverse work activities performed in a variety of contexts. Some of these may be complex and non-routine and involve some responsibility and autonomy. Collaboration with others through work groups or teams and guidance of others may be required.

Level 3 – Independent/autonomous skilled worker

Recognizes competence in a broad range of complex, technical or professional work activities performed in a wide variety of contexts, with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources are often a requirement. The individual is capable of self-directed application, exhibits problem solving, planning, designing and supervisory capabilities.

Level 4 – Supervisory specialist worker

Recognizes competence involving the application of a range of fundamental principles and complex techniques across a wide and unpredictable variety of contexts. Requires very substantial personal autonomy and often significant responsibility for the work of others, the allocation of resources, as well as personal accountability for analysis, diagnosis, design, planning, execution and evaluation.

Level 5 – Managerial professional worker

Recognizes the ability to exercise personal professional responsibility for the design, development or improvement of a product, process, system or service. Recognizes technical and management competencies at the highest level and includes those who have occupied positions of the highest responsibility and made outstanding contribution to the promotion and practice of their occupation.