



Trainer guide

BSB51004 Diploma of Business (Frontline Management)

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QuickStart for trainers

This section has the basic information you need to get started using the *Up Front!* Toolbox.

What's in this Toolbox?

This Toolbox contains learning resources for self-guided study *and* group learning. They may be used in online or blended delivery settings.

The design of *Up Front!* is based on a problem-centred approach to learning. Learners work through sets of structured problem solving activities based on the stories of six team leaders and their trainer, and then apply what they have learnt to their own workplace.

Underpinning knowledge is provided in Learning packs for those learners who prefer to take a content-focused approach to their learning.

See the last section of this Trainer guide for a detailed mapping of tasks and case studies to the Training Package.

Units of competency and tasks

Self-contained learning resources are provided for each unit of competency.

Each unit contains two to four tasks aligned to the Training Package. *See the last section of this Trainer guide for a summary of case studies and mapping to the Training Package.*

Table: Units of competency and tasks

Unit of competency	Task
Specialist (core) units	
BSBFLM510B Facilitate and capitalise on change and innovation	Plan for change
	Develop creative and flexible solutions
	Manage emerging challenges and opportunities
Extra (elective) units	
BSBCMN416A Identify risk and apply risk management processes	Identify risks
	Analyse and evaluate risk
	Treat risks
	Monitor and review effectiveness of treatment of risk
BSBCMN419A Manage projects	Get ready to manage a project
	Make the project happen
	Close the project and reflect on it

BSBFLM513A Manage budgets and financial plans within the work team	Understand financial management fundamentals
	Manage financial performance
	Monitor and control finance
	Review, evaluate and present financial management process improvements

Task and Learning packs

Tasks

Each task is mapped to performance criteria in the Training Package. Tasks may be used for learning and assessment, and may be incorporated into a portfolio of work for assessment.

Tasks contain:

- **See** – learners see a model of good practice when one of six team leader characters in *Up Front!* solves a workplace problem. Also contains:
 - sample work tools used by the team leader character, including a review by the team leader on their own performance (in .DOC file format)
 - a review by the 'trainer' character
 - a groupwork idea.
- **Try** – another team leader tells us about their problem and learners 'try out' their skills by working on solutions. Also contains:
 - a decision-making quiz
 - a decision tool activity
 - a groupwork idea
 - general information on problem-solving and decision-making.
- **Apply** – learners apply the task in their own workplace (or another practice setting) in order to begin transferring new knowledge and skills into their day-to-day practice. This section contains:
 - a groupwork idea
 - a workplace task sheet in the form of a generic template that learners may adapt to the task at hand.

Tip!

The workplace task sheets throughout the Toolbox follow a general format with guidelines to help learners create their own workplace activity for each task.

We recommend that trainers customise these workplace task sheets with more specific guidelines on how learners should approach the

task in their industry or organisation.

They are provided in .DOC file format so you can edit them in a program like Microsoft Word. Distributing the customised version to your group can then be as easy as sending an email with their workplace task sheet attached.

Learning packs

Each task is supported by a **learning pack** with content to support learners as they develop their knowledge and skills. The learning packs are for self-guided study and contain:

- **Overview** with an explanation of key terms
- **Show and tell** – an audio presentation to introduce the topic the learner
- **Content guide** – reading notes written in easy-to-read plain English, with short questions to help learners make the connection between the 'theory' and their own workplace
- **Websites** to explore for more resources
- **Self-check** – a short quiz so learners can see how they're going with the key ideas in the learning pack.

Tip!

During trials it was found that some learners preferred to begin a topic by reading through the Content guide and writing short answers to the 'My workplace' activities.

Other learners preferred to start by listening to the stories and problems in the 'See' and 'Try' sections.

More confident learners liked to begin with the workplace task sheet in the 'Apply' section, working through other resources as needed.

Up Front! is designed to allow this flexibility but you may need to guide learners through their first task in a structured way, until they are familiar with the format.

Foundation skills Learning packs

Foundation skills Learning packs contain an outline of some important underpinning knowledge and skills that are relevant to most of the units of competency in *Up Front!* They are:

- Apply legislation to the workplace
- Communicate with your team
- Mentor and coach individuals and teams
- Use business technology

On the Introduction page for each unit we've highlighted each of these whenever they map directly to the performance criteria in the Training Package. You will see the following text:

" ...will help you with Task 2 in this unit."

Different groups of learners will use these resources in different ways, and they'll need to use them at different times. Therefore you may need to provide **directions** to your group on when and how they use them.

Computer hardware and software

You will need

- a standard web browser like Internet Explorer (version 6.0 and above) or Netscape (version 6.2 or higher)
- a monitor where you can set the display size to 800x600 or 1024x768 or more
- IBM compatible computer with 600 MHz processor (minimum)
- 128 MB of RAM (minimum)
- Flash Player version 7 or higher (when you go to the home screen for a Unit, the Toolbox will tell you if you don't have it)
- A program such as Microsoft Office, Word or Open Office that can open .DOC files.

Follow the links to **Requirements** and **Help** on any Home screen for more details.

Learner guide

We have provided a detailed **Learner guide** with the *Up Front!* Toolbox. It has instructions on how to use each part of the Toolbox. It is a .DOC file so you can modify it with any information specific to your learners.

Up Front! characters

Case studies are based on six team leader characters and their trainer:

- **Shauna** – supervisor in postal and delivery
- **Ken** – supervisor in a plant bakery
- **Arens** – maintenance team leader in a local Council
- **Jill** – bar supervisor in a Club
- **Garry** – head nurse in a nursing home
- **Jamilah** – accounts payable manager in a bank
- **Susan** – their trainer

See the section 'Training Package mapping – Tasks and case studies' for a summary of all case studies.

Introducing learners to management

If you wish to begin your training program with some background to general management principles, you may like to give the following reading guide to your group.

Learners will also come across these reading activities as they work through the *Up Front!* Content guides, as listed in the following table.

Table: Reading guide for an introduction to management

Reading guide	Contained in Content guide for...
<p>Levels of management</p> <p>Cole, K (2001) <i>Supervision The theory and practice of first-line management</i>. Prentice Hall: Sydney, pp 6-7, and/or</p> <p>Robbins, S, Bergman, R, Stagg, I & Coulter, M (2003) <i>Management</i>. 3rd Edition. Prentice Hall: Sydney, pp 6-7.</p> <p>These books talk about the different levels of management in organisations:</p> <ul style="list-style-type: none"> • senior managers • middle managers • frontline managers (team leaders, supervisors). <p>How are these roles similar and different? For example, consider the goals and objectives that are set at each of these levels. What titles are used for these levels in your organisation?</p>	<p>BSBCMN402A Develop work priorities, Task 1 Develop plans and schedules</p>
<p>Functions of management</p> <p>Cole, K (2001) <i>Supervision The theory and practice of first-line management</i>. Prentice Hall: Sydney, pp 8-11, and/or</p> <p>Robbins, S, Bergman, R, Stagg, I & Coulter, M (2003) <i>Management</i>. 3rd Edition. Prentice Hall: Sydney, pp 9-11.</p> <p>These books talk about how managers and supervisors have five overall functions to do in their jobs:</p> <ul style="list-style-type: none"> • planning – defining goals and developing plans to achieve them • organising – arranging resources to get the work done • staffing – recruiting and training staff • leading – setting a good example, guiding and motivating the team • monitoring – watching ‘how things are 	<p>BSBFLM412A Promote team effectiveness, Task 1 Plan to achieve team outcomes</p> <p>BSBFLM405B Implement operational plan, Task 1 Obtain resources</p> <p>BSBCMN419A Manage projects, Task 1 Get ready to manage a project</p>

<p>going?</p> <p>How do these functions fit in with the day-to-day work that you do as a team leader?</p>	
<p>Approaches to leadership</p> <p>Cole, K (2001) <i>Supervision The theory and practice of first-line management</i>. Prentice Hall: Sydney, Ch 2 pp 606-624, and/or</p> <p>Robbins, S, Bergman, R, Stagg, I & Coulter, M (2003) <i>Management</i>. 3rd Edition. Prentice Hall: Sydney, Ch 16 pp 482-502.</p> <p>These books talk about different approaches to leadership (leadership theories, or ways of thinking about being a manager):</p> <ul style="list-style-type: none"> • trait approach – these theories say you need certain traits or qualities to be a manager, eg confidence, intelligence, initiative • behavioural approach – these theories often put managers into categories according to how the manager behaves, eg authoritarian or democratic • situational approach – these theories say that effective managers vary their leadership style to suit the situation (also called the contingency approach) <p>Think about how these approaches provide guidelines to how you interact with your team, and solve problems in the workplace.</p>	<p>BSBFLM412A Promote team effectiveness, Task 2 Encourage teamwork</p> <p>BSBFLM403B Implement effective workplace relationships, Task 4 Manage difficult situations</p> <p>BSBCMN419A Manage projects, Task 2 Make the project happen</p>

Tools and templates

Up Front! contains a number of workplace tools and templates. Trainers should be aware that:

- all the tools are aids to managing, they are not guarantees of success
- there are always a range of tools for managing particular issues beyond the ones contained in this Toolbox
- even if a tool has been successful in a particular situation that doesn't mean it will be equally successful next time round – because variables such as the manager/employee relationship, available resources, external factors etc may all have changed in the meantime
- there is never only one best way of doing things as what is best for some people is not for others.

Please make these points clear to your learners as well.

Organisational gaps

In undertaking some tasks learners may find their workplace doesn't have the processes, plans or policies mentioned in the *Up Front!* Toolbox. This is not an unusual situation. Many organisations are at different stages of development. If you identify organisational gaps that may inhibit learners performing a Toolbox task you should customise the task appropriately.

Assessment guidelines

The following information is provided as a guideline only, and should not be interpreted as a prescribed assessment strategy. Registered Training Organisations (RTOs) should design their own assessment for this qualification.

Co-assessment of certain units in this qualification is recommended – be sure to check the guidelines in each Unit of Competency in the Training Package. With this in mind we have provided two sample workplace projects that provide a co-assessment strategy for certain units. These are on the following pages, and you should adapt these for your own learners.

The **workplace task sheet** in each task is designed to align to specific performance criteria in the Training Package. These are listed in the Performance criteria page in each Unit in the Toolbox. This means that completed task sheets may be added to a **portfolio of evidence** for assessment.

If you have experienced candidates who request an **assessment-only pathway** to their qualification, but who do not have sufficient evidence to apply for recognition, the task sheets may also be used for this purpose.

Other assessment methods are:

- **observation of workplace performance** – will need a well planned observation guide; will need to be combined with other methods to assess underpinning knowledge
- **simulation** – for example role plays to assess negotiation or consultation skills; useful for overcoming ethical issues when direct observation in the workplace is not appropriate
- **interview/dialogue** – present case scenarios and ask learners how they would respond; include questions to assess underpinning knowledge; improves access and equity; when integrated with observation of performance can assess understanding in context; may be conducted online.

Assessment resources

Developed to help VET professionals plan, design and deliver assessment using the web, **Assessing Online** includes case studies and a gallery of different online assessment strategies.

Go to <http://www.flexiblelearning.net.au/designing/assessing/index.htm>

Recognition and learning plan tool

An online tool for self-assessment, recognition and developing a personalised learning plan is provided with the *Up Front!* Toolbox.

The benefits of this tool for learners and RTOs are:

- to facilitate and streamline 'gap training' which is the focus of workplace delivery of the Frontline Management qualification
- to help learners develop learning plans that are personalised to their specific needs (the learning plan also links directly into Toolbox resources, effectively serving as a personal *Up Front!* Toolbox menu)
- to streamline recognition and make it more accessible by stepping candidates through the process, from initial self-assessment through to organising their portfolio
- to reduce time spent by RTOs explaining recognition to candidates and assisting them to compile portfolios.

For recognition purposes, learners may use it to generate their own Recognition organiser. This is a report that will assist them to collate the information they will need for an application for recognition, which they will then submit using the normal processes within your RTO.

See the **Help** section for instructions on using this tool (from the main Toolbox home screen, open the Recognition and learning plan tool and click Help).

Facilitating online

Here are some great tips supplied by trainers who facilitate elearning programs. They're not meant to be prescriptive, and different things will work for different trainers and learners.

Tips for trainers

- At enrolment time, well before classes begin, ask learners to work through this site: www.tafe.qld.gov.au/rsg - **Ready Set Go, a student guide to Online Learning**. Explains the language of the Internet, and has guides for using email, sending and receiving attachments, using web browsers, and using web forums and chat systems.
- Learning online in distance mode, and interacting with people via emails and chats, will require learners to have reasonable **literacy and keyboard skills** – more so than for learners who learn in a face-to-face setting where they can *talk* about ideas. If this isn't realistic for your learners consider face-to-face sessions to supplement distance learning, or other supports such as telephone support or teleconferences.
- If learners are new to online learning (and are able to get to a workshop) some trainers may like to hold a face-to-face **orientation** workshop for online learners. A session plan for one of these is in this Trainer Guide.
- If you are delivering the program online, email will probably be the primary method of communication with your learners, so ensure that **you** have a clear system of email folders for managing the traffic.
- Send a **weekly email** to all learners with reminders of the tasks that should be completed, the tasks in progress with reminders for times of chats or forums during that week. Alerting learners to activities for which they should be undertaking individual learning (eg in the learning tasks and the learning packs) prior to a group activity in the week to come can also be helpful. You might comment on the quality of work in the preceding week and provide tips and encouragement for the task at hand.
- Be clear about **timeframes** by setting targets for learning. These can help you with your 'online lesson' planning. You will need to set frameworks so that learners know what to do, and when to do it.
- If you manage a very large group of learners, create a sense of community online by setting up **study groups** of 4 – 8 learners, all of whom begin the Unit at more or less the same time. This makes it easier for learners to gain the benefits of social learning and to form networks as they study.
- Once you have set up the study group, facilitate an **online 'icebreaker'** activity when students start the Unit. Ideas for facilitating this activity are contained in this Trainer guide.

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- Plan ahead and be clear to your learners about which **groupwork activities** that you expect them to complete (also see the next section containing extension activities).
 - When learners are about to start an online group activity, send them an email with instructions on what teams they will be in or whose job it is to start a round robin activity. **Do not presume learners will work it out.**
 - Establish whether your learners have completed any previous units online. This way you can gauge how much support you will need to provide to coach learners to develop **online learning skills**, as well as the content in the units. You will probably find learners require different levels of support. In the first few weeks get a clear picture of how each learner is coping to enable early intervention.

Starting together as a group – online icebreakers

You can use an online icebreaker in a computer training room or with learners who are different locations.

If you intend your learners to collaborate online (using email, a learning management system, or a web discussion board) it's important to give them a change to get familiar with each other by using the medium, before they get down to the serious part.

Go to www.thiagi.com for some ideas. Follow the link to Freebies, then to Training games.

Set group projects based on the workplace task sheets

The workplace task sheet under the 'Apply' tab in each *Up Front!* task can be used for groupwork.

A group could:

- work together to identify a similar problem/issue/opportunity that they will base their task on, then work individually with their own work teams, and later report back to the group as part of their own review process, or
- if they are in the same organisation, work together to identify a common problem/issue/opportunity, and then work on it as a team within their organisation.

Some advantages of this approach are:

- it can facilitate social learning, especially useful if learners are geographically dispersed or isolated
- learners gain practice using online communication tools in a practical task-focused way
- it can allow learners to practise skills of planning, collaboration, consultation and networking required of an frontline manager

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- it can be integrated with assessment of underpinning skills such as communication skills, and of the Key Competencies.

Here are some practical suggestions for implementing group projects:

- limit teams to no more than 3 or 4 learners
- set a date for completion of the group project
- consider asking learners to write a **self assessment** and **peer assessment** of their contribution to the group process – this will encourage learners to reflect on their collaborative skills, as well as providing you with more information if you are considering using the groupwork as an assessment item
- provide guidelines as to how you expect your learners to collaborate, eg entirely online, or through a mix of face-to-face meetings and online communication.

Implementing the groupwork ideas – fun ways to do it

When you see the groupwork ideas in *Up Front!* you will notice that we have confined it to a general topic or question, ie we have not written a facilitation process into the question itself.

This is so that you can facilitate the groupwork ideas in a way that suits your learners, your teaching style and the technology available. Here are some ideas.

- **Email game** – designed to progressively generate and process content around a salient issue; go to www.thiagi.com for more information; follow the link to 'Freebies'.

Example adapted from BSBFLM409B Implement continuous improvement, Task 1:

'101 breakthrough improvements'

Create a list of any breakthrough improvements in your workplace that would make a difference to improving customer service.

Appoint a game coordinator. Each learner sends a list of 10 breakthrough improvements in their workplace that would make a difference to improving customer service (they send this to the game coordinator). Game coordinator collates these and sends the complete list back to all players. Players then vote on the top 5 improvements. The coordinator again collates the results and feeds them back to players.

Game takes no more than 5 days.

- **Debate** – turn the groupwork topic into a debate.

Example adapted from BSBFLM412A Promote team effectiveness, Task 1:

'Absenteeism and low morale are signs that the supervisor is not doing their job'

Assign teams to the 'yes' and 'no' cases, choose an adjudicator, and hold the debate on your forum or chat system.

A fun alternative to the traditional debate is to form three teams. If you're in a training room get two teams to stand facing each other to increase the sense of confrontation; these two team are assigned the 'yes' and 'no' cases. They then argue their case to each other as forcefully as they can; there are no rules.

The third team votes on the winner.

- **Depolariser** – aims to increase levels of awareness about alternative points of view; see www.thiagi.com for more information; follow the link to 'Freebies'.
- **At the coalface** – focusing on a particular topic, learners tell each other about their own experiences at work. It's usually easy for most people to talk about their own experiences. The questions you set for the group should also encourage some critical reflection, eg 'What would you do differently?'
- **Scavenger hunt** – learners find good websites on a particular topic, containing useful tools etc, each group is responsible for preparing a report to the larger group of websites with a brief review of each. A good way to develop web research skills and collaboration skills at the same time
- **Workplace research** – use team research to get learners to look at a particular issue/problem/process in their workplace(s). Put learners in 'mini-teams' then get them to report back to the larger group. You can use the 'My workplace' prompt questions in the **Content guide**. The Content guide is found inside each Learning pack in the *Up Front!* Toolbox.
- **Peer review** – learners team up with a study buddy and give structured feedback on each other's work on the task. Useful to encourage group collaboration and support, and to practise the important skill of giving and receiving feedback. Use the process of Praise-Improvement-Praise to facilitate this so that the focus remains constructive:
 - **praise** one specific thing the other person did
 - suggest one point for **improvement**
 - **praise** one more specific thing the other person did.
- **Role play** – use this where practising an interpersonal skill is relevant. Use role plays carefully – they require some skill on the part of the facilitator.

Orientation session plan

Where learners are new to online learning it is helpful (if possible) to provide a face-to-face orientation session. Why? Relationships in online learning support successful learning in the same way as in traditional classroom settings, establishing contact with peers and facilitators assists in developing these relationships.

The following is designed for a 1 – 3 hour session; just choose the activities you want to use with your group.

Table: Orientation session plan

Time	Activity	Resources
15 min	Icebreaker – introduction game	Any game, see www.thiagi.com
15 min	Outline outcomes for this session , eg: <ul style="list-style-type: none"> • establish basic skills for online learning • establish expectations of learners • provide guided introduction to <i>Up Front!</i> Toolbox • conduct a self-assessment and begin to prepare an individual learning plan. 	
15 min	Brainstorm expectations of learners – groups of 5 – 7 Feedback whole group	Butchers paper
	5 minute break – move to computers	
30 minutes	Introduce the Learning Management System or communication tool. Be sure you point them to the system's online learner or user manual. Ask learners to: <ul style="list-style-type: none"> • update their details – eg change password or email address. • post to forum – a brief bio – or it could be game (3 things about yourself, 1 of which is lie) – each learner is to respond to someone's post - which is the lie?) 	Computers with LMS (eg WebCT) or communication tools (eg WebBoard)
30 min	Give learners the following questions (or questions you devise): What aspect of being a manager do you particularly like and why? What attracted you to the job/industry you're in? Where do you see yourself in 5 or 10 years? Facilitate a chat around these 3 questions . This could lead into the self-assessment activity using the <i>Up Front!</i> Recognition and learning plan tool (see below)	Computers with LMS (eg WebCT, Janison) or access to an online group tool (eg WebBoard, ninemsn groups)

Time	Activity	Resources
45 min	<p>Introduce learners to features of Toolbox:</p> <ul style="list-style-type: none"> • Identify the unit/units they are to study. • Move through the structure of the unit. The learning tasks, the characters, the groupwork ideas, the learning packs. • Ask each learner to work through the online Guided tour. 	<i>Up Front!</i> Toolbox – on server or CDs for each learner to access
45 min	<p><i>Up Front!</i> Recognition and learning plan tool:</p> <ul style="list-style-type: none"> • Explain the concepts of self-assessment, recognition and learning plans (there is background information you can use on the Help screen of this tool) • Briefly show the main section of the Recognition and learning plan tool – click the tabs that correspond with the concepts you’ve just explained. • Learners can complete the self-assessment while you move around the room to guide and help them • Refinement of any recognition applications and learning plans may be done after this orientation session. 	<i>Up Front!</i> Toolbox – on server or CDs for each learner to access
5 min	<p>Revisit Outcomes for session and learner expectations</p>	Brainstorm material and overheads on session objectives

Customising for your clients and learners

Workplace task sheets and Content guides (.DOC)

The **Workplace task sheets** provide the practical activity for each Toolbox task. We've designed them to work in a wide range of situations, but they will be even more useful if you customise them to add specific instructions for your own learners.

The **Content guides** are detailed readings on the topic, with short activities that help the learner make the connection between the 'theory' and their own job.

They are provided as **.DOC** files so you can change them easily using your Office application or word processor. You can either:

- make the changes and email them to your learners (or distribute through your learning management system), or
- overwrite the version of the resource that your learners are using from a CD or server.

The workplace task sheets are located inside each unit:

- open the folder **toolbox_601**
- open the folder with the number you want to customise, eg **cmn402a**
- open the **documents** folder – the task sheet for all tasks in the unit are here.

The Content guides are located inside the **lo** folder:

- open the folder **toolbox_601**
- open the folder **lo**
- open the folder with the number you want to customise, eg **2003_237_004**
- open the **documents** folder – the Content guides for the topic is here.

See-Try-Apply case studies (Flash)

The **See-Try-Apply case studies** in the Tasks are rich in media, but we've built them so you can customise the content without needing to learn the Flash developer software. You can:

- **change entire case studies**, including audio and images, so they're specific to your industry
- **edit** the text information on the overview or any other screen to highlight a particular point for your learners
- **edit** the decision quiz.

You can also edit any of the work samples and the learner's workplace task sheet (see instructions for editing .DOC files above).

Show and tell presentations (Flash)

The **Show and tell** presentations in the Learning packs contain sound and images, but we've built them so you can customise the content without needing to learn the Flash developer software. The Show and tells provide learners with an overview of the topic area, so you could customise it to:

- **your** industry (eg images specific to your industry)
- **your** State (eg information on workplace relations laws, or OHS laws)
- **your** organisation (eg information on quality systems, or performance management systems).

Quizzes (Flash)

The **quizzes** in the Try case studies (decision quiz) and the Learning packs (self-check) may also be customised.

Editing the .TXT files for Flash items

You can customise these Flash items by editing a **.TXT** file that contains their data, and by changing the images or sounds that the .TXT files references.

You will need to copy the contents of the CD onto a hard drive so that your changes are saved. You can then copy your customised version of the *Up Front!* Toolbox to your web server, or onto CDs for your learners.

For instructions on how to do this, see 'Editing the .TXT files for See-Try-Apply & Show and tell' in the *Up Front! Technical guide*.

Training Package mapping and case study summaries

Unit of competency	Task	Case studies	Performance criteria
Specialist (core) units			
BSBFLM510B Facilitate and capitalise on change and innovation	Plan for change	<p>See: Some of Shauna's team members are not happy about proposed changes to the mail sorting system. Shauna needs to plan and communicate to reassure and engage her team.</p> <p>Try: A new accounting system is being introduced and it will affect how all members of Jamilah's team do their jobs. How can she plan to manage or avoid problems associated with implementing the new system?</p>	<p>1.1 The manager contributes effectively to the organisation's planning processes to introduce and facilitate change</p> <p>1.2 Plans to introduce change are made in consultation with appropriate stakeholders</p> <p>1.3 The organisation's objectives and plans to introduce change are communicated effectively to individuals and team</p>
	Develop creative and flexible solutions	<p>See: Jamilah looks at staff training and risk analysis for the new accounting system.</p> <p>Try: Arens' organisation is about to merge with another. The culture of the organisation will change and Arens' knows that his team will find the change difficult.</p>	<p>2.1 A variety of approaches to managing workplace issues and problems are identified and analysed</p> <p>2.2 Risks are identified and assessed, and action initiated to manage these to achieve a recognised benefit or advantage to the organisation</p> <p>2.3 The workplace is managed in a way which promotes the development of innovative approaches and outcomes</p> <p>2.4 Creative and responsive approaches to resource management improve productivity and services, and/or reduce costs</p>

Unit of competency	Task	Case studies	Performance criteria
	Manage emerging challenges and opportunities	<p>See: A new staff induction system is being piloted in Jill's work area. Jill thinks her staff will be supportive and keen to be involved. How can she make the most of the opportunity and prepare for any challenges they may face?</p> <p>Try: The implementation of the new mail sorting system was delayed while Shauna was on sick leave. Her team was trained, but had no one to coach them through teething problems. This led to delays in mail sorting and complaints. Shauna has been asked to monitor the system and make recommendations to prevent future mishaps.</p>	<p>3.1 Individuals and teams are supported to respond effectively and efficiently to changes in the organisation's goals, plans and priorities</p> <p>3.2 Coaching and mentoring assist individuals and teams to develop competencies to handle change efficiently and effectively</p> <p>3.3 Opportunities are identified and taken as appropriate, to make adjustments and to respond to the changing needs of customers and the organisation</p> <p>3.4 Information needs of individuals and teams are anticipated and facilitated as part of change implementation and management</p> <p>3.5 Recommendations for improving the methods and techniques to manage change are identified, evaluated and negotiated with appropriate individuals and groups</p>
Extra (elective) units			
BSBCMN416A Identify risk and apply risk management processes	Identify risks	<p>See: Many employees at the bakery work on 24 hour rotating shifts. There are suspicions that there might be OHS implications of shift work, but no hard data. Ken has been asked to develop a plan to identify the health risks of shift work in the bakery production area.</p> <p>Try: There have been robberies in the local area. Jill's bar receives a lot of cash during its operating hours and so she has been asked to identify and record risks associated keeping cash.</p>	<p>1.1 Tools for identification of risks are accessed</p> <p>1.2 Risks are identified</p> <p>1.3 Identified risks are documented in accordance with relevant policies, procedures and legislation</p>

Unit of competency	Task	Case studies	Performance criteria
	Analyse and evaluate risk	<p>See: The nursing home is considering expanding its services to include medium-term rehabilitation. The Board needs to plan to address any risks involved and so Garry has been asked to assess a number of identified risk areas and report to the Board.</p> <p>Try: Jill's report identifying the risks in handling cash in the bar area was well received by the GM and she has now been asked to analyse the risks and develop priorities for managing them.</p>	<p>2.1 Causes of risks are analysed</p> <p>2.2 Potential impact of risks is determined</p> <p>2.3 Frequency of exposure to risks is determined</p> <p>2.4 Likelihood of risks is determined</p> <p>2.5 Risks categorisation is undertaken and risk priorities set</p> <p>2.6 Analysis processes and outcomes are documented</p>
	Treat risks	<p>See: Jamilah's team have already identified the major risks associated with implementation of the new accounting system. Now they need to work out how to eliminate or manage these risks.</p> <p>Try: Garry's risk assessment for the proposed rehab program was successful and the control measures were initially effective. Some problems have since shown that there needs to be an ongoing review of control measures to ensure their continued effectiveness.</p>	<p>3.1 Appropriate control measures for risks are determined and assessed for strengths and weaknesses</p> <p>3.2 Risks are continuously monitored</p> <p>3.3 Control measures are identified for all risks</p> <p>3.4 Risks relevant to whole of organisation or having an impact beyond own work responsibilities and area of operation are referred on to others as per established policies and procedures</p> <p>3.5 Control measures for own area of operation and/or responsibilities are chosen and implemented</p> <p>3.6 Treatment plans are prepared and implemented</p>

Unit of competency	Task	Case studies	Performance criteria
	<p>Monitor and review effectiveness of treatment of risk</p>	<p>See: After complaints about bias against women in recruitment and selection, Shauna's organisation conducted a risk analysis and developed a risk treatment plan to ensure compliance with the law. Shauna is now required to monitor the success of the risk treatments in her department.</p> <p>Try: Monitoring of the new accounting system shows that overall it is a success. However two of Jamilah's staff (who resisted the new system from the beginning and did not perform well during training) continue to perform poorly on the new system.</p>	<p>4.1 Implemented treatments are regularly reviewed against measures of success</p> <p>4.2 Review results are used to improve the treatment of risks</p> <p>4.3 Assistance is provided to auditing risk in own area of operation</p> <p>4.4 Management of risk in own area of operation is monitored and reviewed</p>

Unit of competency	Task	Case studies	Performance criteria
BSBCMN419A Manage projects	Get ready to manage a project	<p>See: As part of a new environmental education project, the Council is installing bag dispensers and bins for dog owners. Arens is getting ready to manage the installation project.</p> <p>Try: Ken wants to organise occupational health and safety training for his team. He wants to plan it so he'll get maximum attendance with minimum disruption to the work.</p>	1.1 Project scope and other relevant documentation is accessed 1.2 Project stakeholders are defined 1.3 Clarification is sought from delegating authority of any issues related to project and project parameters 1.4 Limits of own responsibility and reporting requirements are identified 1.5 Relationship of project to other projects and to the organisation's objectives is clarified 1.6 Available resources to undertake project are determined and accessed 2.1 Project plan including timelines, task breakdown, roles and responsibilities is developed 2.2 Appropriate project management tools are identified and accessed 2.3 Risk management plan, which includes OHS, is formulated for project 2.4 Project budget is developed and approved 2.5 Team members are consulted and their views taken account of in planning the project 2.6 Project plan is finalised and any necessary approvals gained to commence project according to documented plan

Unit of competency	Task	Case studies	Performance criteria
	<p>Make the project happen</p>	<p>See: Management is interested in Arens' project so they will be monitoring its outcomes. But some of Arens' staff have negative attitudes about the project, and he's worried this may impact on how it goes.</p> <p>Try: Jill is organising a one-off fund raising event that will involve staff working with unpaid volunteers.</p>	<p>3.1 Action is taken to ensure that project team members are clear about their responsibilities and the requirements of the project</p> <p>3.2 Support is provided to project team members, especially with regard to special needs, to ensure that the quality of the expected outcomes of the project and documented timelines are met</p> <p>3.3 Required record keeping systems are established and maintained throughout the project</p> <p>3.4 Plans for managing project finances, human, physical and technical resources and quality are implemented and monitored</p> <p>3.5 Project reports are completed and forwarded as required to stakeholders</p> <p>3.6 Risk management is undertaken as required to ensure project outcomes are met</p> <p>3.7 Project deliverables are achieved</p>
	<p>Close the project and reflect on it</p>	<p>See: The final OHS workshop has been delivered and Ken is winding the project up. He has plenty of feedback and information, and now he needs to document it in a final report.</p> <p>Try: Shauna needs to finalise her project and focus the staff back on their day-to-day jobs.</p>	<p>4.1 Financial record keeping associated with project is completed and checked for accuracy</p> <p>4.2 Staff involved in project are assigned to new roles or reassigned to previous roles</p> <p>4.3 Project documentation is completed and any necessary sign offs obtained for concluding project</p> <p>5.1 Project outcomes and processes are reviewed against the project scope and plan</p> <p>5.2 Team members are involved in the review of the project</p> <p>5.3 Lessons learnt from project are documented and reported within the organisation</p>

Unit of competency	Task	Case studies	Performance criteria
BSBFLM513A Manage budgets and financial plans within the work team	Understand financial management fundamentals	<p>See: Jill is standing in as the Food Services Manager and needs to check and verify the annual budget before it's finalised. Previous budgets were developed too quickly, without consultation, and so Jill needs to gather information from past budgets and look at expense items very carefully.</p> <p>Try: Sales are down at the bakery and employees are feeling nervous about their job security. Machinery malfunctions and staff turnover are factors in the downturn, but Ken suspects that sales targets are unrealistic. How can he prove his point?</p>	1.1 Budget/financial plans for the work team are accessed 1.2 Budget/financial plans are clarified with relevant personnel within the organisation to ensure that documented outcomes are achievable, accurate and comprehensible 1.3 Any changes required to be made to budget/financial plans are negotiated with relevant personnel within the organisation 1.4 Contingency plans are prepared in the event that initial plans need to be varied
	Manage financial performance	<p>See: A new service is about to be introduced and Shauna has the task of finding out if it can be sustained into the future. To do this she will do a cost volume profit (break even) analysis.</p> <p>Try: How will Arens get his team to be supportive of councils' decision to increase rates? He decides to prepare some information that will help his team understand how the organisation allocates funds.</p>	2.1 Relevant details of the agreed budget/financial plans are disseminated to team members 2.2 Support is provided to ensure that team members can competently perform required roles associated with management of finances 2.3 Resources and systems to manage financial management processes within the work team are determined and accessed

Unit of competency	Task	Case studies	Performance criteria
	Monitor and control finance	<p>See: There has been an increase in expenditure and Garry's task is to identify any trends that could explain why. He will need to gather information from past years and the current year for a variance analysis.</p> <p>Try: Garry has analysed expenditures and can see that better controls are needed – petty cash and accounts payable are two areas to target. Training for the team could be a way to get them to take ownership of the new controls, but he's not sure how they'll respond.</p>	<p>3.1 Processes for reporting of expenditure, income, assets, stock, consumables, equipment and wastage are implemented across the work team to monitor actual expenditure and to control costs</p> <p>3.2 Expenditure and costs are monitored on an agreed cyclical basis to identify cost variations and expenditure overruns</p> <p>3.3 Contingency plans are implemented, monitored and modified as required to maintain financial objectives</p>
	Review, evaluate and present financial management process improvements	<p>See: An audit has identified incorrect claims by a supplier and senior management want to prevent it happening again. Jamilah needs to develop a contingency plan for the accounts payable area which could then be a model for the rest of the organisation.</p> <p>Try: Jill wants to review the food and beverage product lines so she can offer what the customers really want. She has collected sales data about the products and she now needs to analyse and interpret the data.</p>	<p>4.1 Data and information on the effectiveness of financial management processes within the work team are collected and collated for analysis</p> <p>4.2 Data and information on the effectiveness of financial management processes within the work team are analysed and any improvements to existing processes identified, documented and recommended</p> <p>4.3 Agreed improvements are implemented and monitored in line with financial objectives of the work team and the organisation</p>

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