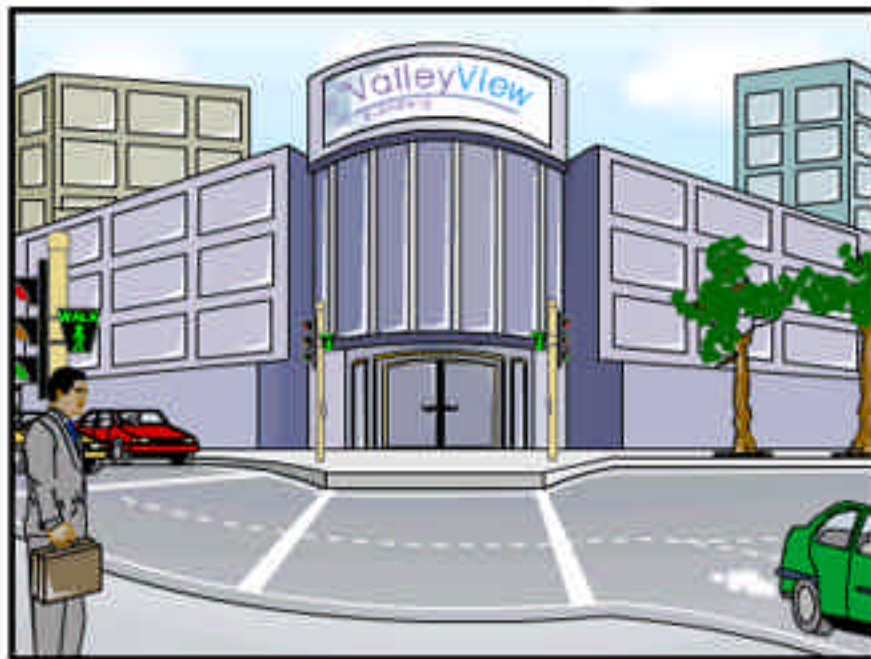


Teachers guide

(incorporating the Technical guide)



The situation-based approach of Admin Toolbox₂ applies contemporary teaching models to create a state-of-the-art product. This guide explains the approach of the Toolbox in detail.

Table of Contents

Purpose	1
Target audience.....	1
Units of competency.....	2
Underpinning ideas.....	3
The learning environment.....	5
Project brief.....	7
Introduction.....	7
ValleyView.....	7
Communication	11
Your project.....	11
The units.....	11
The importance of communication.....	12
How to use the Toolbox.....	13
Level of learning.....	14
Details of the units and their relationship with the project.....	15
BSBCM404A Develop teams and individuals.....	15
Unit competencies.....	15
Teacher’s role.....	16
Alternative approaches.....	18
BSBCM405A Analyse and present research information	19
Unit competencies.....	19
Teacher’s role.....	20
Alternative approaches.....	22
BSBCM412A Promote innovation and change.....	24
Unit competencies.....	24
Teacher’s role.....	25
Alternative approaches.....	27
BSBADM501A Manage the establishment and maintenance of a workgroup network ...	31
Unit competencies.....	31
Teacher’s role.....	32
Alternative approaches.....	33
BSBADM502A Manage meetings.....	35
Unit competencies.....	35
Teacher’s role.....	36
Alternative approaches.....	38
BSBADM503A Plan and manage conferences.....	42
Unit competencies.....	42

Teacher's role.....	44
Alternative approaches.....	44
BSBADM504A Plan or review administration systems.....	48
Unit competencies.....	48
Teacher's role.....	49
Alternative approaches.....	50
BSBADM505A Manage payroll	53
Unit competencies.....	53
Teacher's role.....	54
Alternative approaches.....	55
BSBADM506A Manage business document design and development.....	58
Unit competencies.....	58
Teacher's role.....	59
Alternative approaches.....	61
BSBRKG502A Manage and monitor business or records systems	64
Unit competencies.....	64
Teacher's role.....	66
Alternative approaches.....	67
BSBHR506A Manage recruitment selection and induction processes.....	70
Unit competencies.....	70
Teacher's role.....	71
Alternative approaches.....	73
How the units match with the situation-based approach	76
Approach to assessment of competency.....	76
Technical guide.....	77
Installing the Toolbox	77
Communications tools.....	77
Customisation	78
Directory structure.....	78
Structure within each topic.....	80
Using a learning management system.....	80
Accessibility	81
Common problems	81
Help desk.....	82
Competency matrix for all the units and tasks.....	83
References	89

Purpose

The Admin Toolbox₂ Series 5 Toolbox supports the Diploma of Business Administration and Diploma of Business in the Business Services Training Package (BSB01), covering units from three streams including Specialist Administration, Human Resources and Records Management, as well as some common units.

Business administration is a popular and thriving specialisation across Australia. The demand for continuous training is high as organisations of all kinds strive for competitive advantage in increasingly changeable environments. Training must be flexible to suit the needs of people working long or unpredictable hours. The Admin Toolbox₂ is designed to deliver the following benefits:

- flexible training that can be time-managed to fit in with most work schedules
- enhanced relevance of training exercises through on-site capability and customisability of the materials
- savings in time and cost, since training is accessible, modular and customisable.

Research suggests the business and office administration environment challenges personnel strategically, analytically, creatively and interpersonally. Work-based diploma-level learners, especially, require learning resources that engage higher order learning capabilities.

The Admin Toolbox₂ is constructed around situation-based learning models designed to encourage role play and reflection. Easy-to-use competency tools help learners and teachers chart progress through the learning materials.

Target audience

Research suggests that learners in the target audience generally:

- are workplace-based
- have previously studied to at least Certificate IV level (equivalent to first year university level)
- are in the 30–45 age group
- are predominantly female
- have significant work experience
- are motivated to acquire a formal qualification
- have highly developed computer and communication skills
- are adaptable to the online environment
- are self-directed learners who will work to their own study plans.

Teachers in Registered Training Organisations also use the Toolbox. According to industry feedback, the utility needs of teachers include:

- the ability to access individual competencies as discrete segments of work
- easily and intuitively locatable resources
- simple and non-technical installation
- the ability to insert web links, upload new images, alter text and re-sequence learning activities.

This target audience information has informed the development of the Admin Toolbox₂.

Units of competency

In the Business Services Training Package, there are six units at Level 5 (Diploma) in the Specialist Administration stream (marked #), three are related to units at Level 4 of the Common units (marked *), one relates to a unit at Level 5 of the Records Management stream (marked ^) and one relates to a unit at Level 5 of the Human Resources stream (marked >).

Training Package	Business Services	
Qualification	Diploma of Business Diploma of Business Administration	
Competencies		
National code	Units of competency	Nominal hours
# BSBADM501A	Manage the establishment and maintenance of a workgroup network	30
# BSBADM502A	Manage meetings	30
# BSBADM503A	Plan and manage conferences	30
# BSBADM504A	Plan or review administration systems	50
# BSBADM505A	Manage payroll	30
# BSBADM506A	Manage business document design and development	60
^ BSBRKG502A	Manage and monitor business or records systems	40
> BSBHR506A	Manage recruitment selection and induction processes	60
* BSBCM405A	Analyse and present research information	40
* BSBCM412A	Promote innovation and change	50

* BSBCMN404A	Develop teams and individuals	30
	Total hours	450

Underpinning ideas

The Admin Toolbox₂ places the learner in the role of a staff member at the fictional company, ValleyView Publishing. This is the central role-play activity. An overarching project, complete with project brief from the General Manager of the company, asks the learner to engage all the learning materials with specific objectives. A set of tasks and sub-tasks leads the learner into providing feedback on their journey through a combination of self-directed, collaborative, reflective and synthesising project activities.

The situation-based instructional design strategy can be explained with an example. The Toolbox contains a capstone strategic goal designed to integrate all the units of competency. This goal is broadly stated to be setting up a new multimedia branch office of ValleyView Publishing. Five main strategic objectives (called *tasks*) stem from this broad goal. The tasks are broken into sub-tasks, which are the action points for learning in the Admin Toolbox₂.

The approach for the task ***Determine suitable location for new office*** can be summarised as follows.

Task	Matched units
<p><i>Determine suitable location for new office</i> (leading to four situations)</p> <ul style="list-style-type: none"> • Organise meeting to discuss company needs • Develop location brief • Research possible locations • Present findings and make recommendation 	<p>BSBADM502A Manage meetings</p> <p>BSBCMN405A Analyse and present research information (formerly Managing Reports)</p>

A competency selection tool showing the way situations link with elements of competency for the two units is available for teachers and learners. It is built into the Toolbox and is summarised at the end of this Teachers Guide. As the learner selects and enters into a task, a learning sequence unfolds according to the following structure.

- **Sub-tasks for the workplace or ValleyView**
The selected tasks are explained in more detail here. Key information is provided to help with role-play and to guide reflection in a workplace context.
- **Key points**
The **key points** are summarised according to competency requirements.
- **More info**
The **more info** section is made up of topics and includes notes, activities and

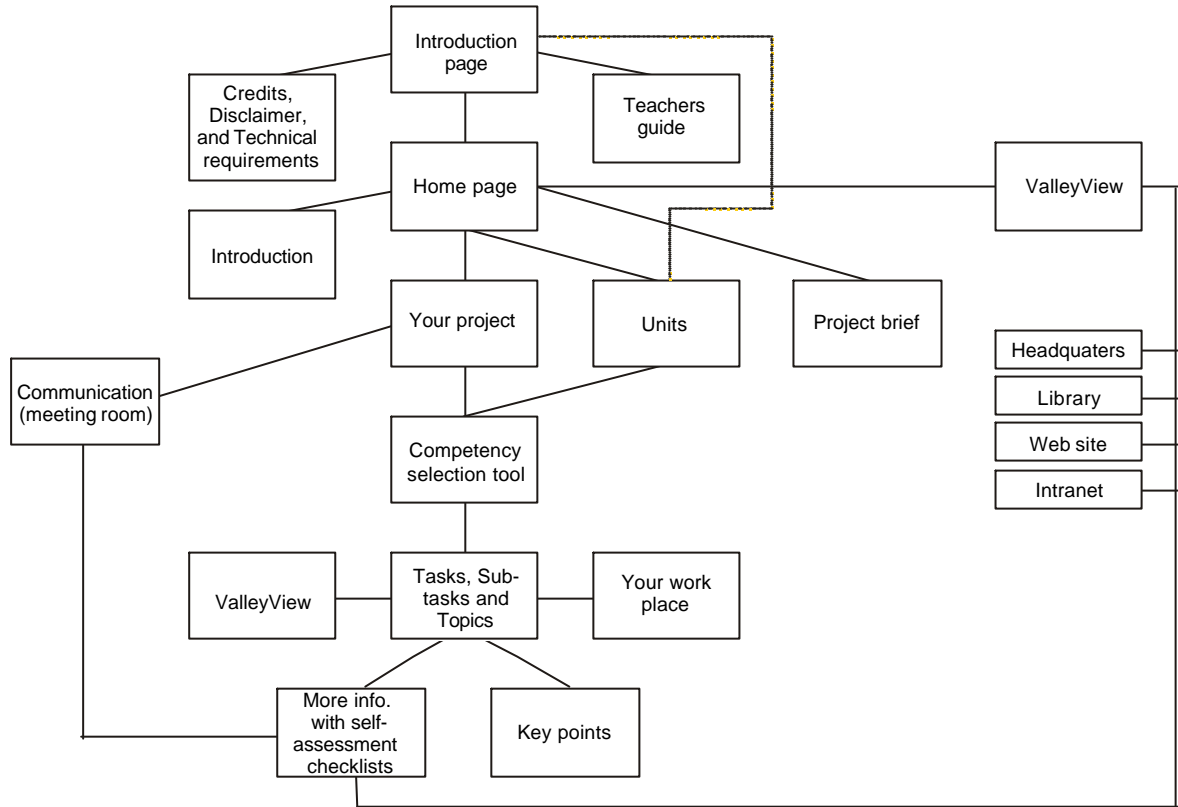
other learning materials that address the competencies covered by the tasks. Learners can elect to use the topics to guide their responses to the tasks. For extra assessment, teachers might tailor the activities in the seminars. There are multiple situation sequences to cater for the competencies, tasks and problems arising from each of the situations. For each topic there is a self-assessment checklist directing learners to related parts.

The learning materials are arranged in file structures that enable teachers to select and present resources in any arrangement without breaking critical link. This allows the teacher and learner to jump in and out of sequences to suit their needs. This disaggregation of file structure is a key benefit of Toolboxes. It means teachers can choose to use the product as a complete package or tailor it with minimal disruption.

The core of the situation-based approach is the presentation of tasks in the fictional company, ValleyView Publishing, and the assignment of role-play and workplace reflection tasks, all of which are supported by notes, activities and other materials, along with key points and self-assessment checklists.

The learning environment

Here is a site map of the main elements of the Admin Toolbox₂.



Here is the screen view of the homepage of the Admin Toolbox₂.

The Admin Toolbox₂



[Technical requirements](#)
[Credits](#)
[Disclaimer](#)

[Index of units](#)
[Teachers guide](#)
[Enter the toolbox](#)

© Australian National Training Authority (ANTA) 2002. All rights reserved.

Important information about technical requirements, and the general disclaimer and credits are available along with the Teachers Guide. The General Manager of ValleyView Publishing, Angus Smissen, introduces the major project and discusses the role of the learner. Here is the screen view at the entrance to the Toolbox.

The Admin Toolbox₂



Project brief

The project brief is a background document giving the learner and teacher extra details about the tasks and sub-tasks within the Toolbox. The brief is a scene-setting tool important for contextualising the situation-based approach. It is linked as a learning object from the folders on the General Manager's desk.

Introduction

The introduction is a simple tour of the main Toolbox features. It is a useful way for learners and teachers to remind themselves of the capabilities of the resources.

ValleyView

ValleyView Publishing is the fictional company with which the learner becomes familiar. It is used as a case study, encouraging role-play and reflection as the learner transits through the workplace tasks. Access to ValleyView is available at all key levels in the Toolbox: on the homepage and in the units, tasks, sub-tasks and topic pages.

All learning resources are disaggregated, which means material from ValleyView can be used as suggested in activities and topics, but teachers are free to export and apply the resources in whatever teaching context is preferred. Here is the screen view of the main entry page for ValleyView resources.

ValleyView

ValleyView is a fictional publishing company which specialises in producing Australian regional tourist guides. You can get more information about how ValleyView works in four different ways.



[ValleyView Headquarters](#)

Meet and interact with staff as they go about their daily work.



[ValleyView Website](#)

Contains a company profile, mission statement, product list, contact information and job opportunities.



[ValleyView Intranet](#)

Contains company policies and procedures, marketing materials, project reports, templates and staff development resources.



[ValleyView Library](#)

Contains extra references, bibliographies and web links useful for learners.

Once within ValleyView, there are links to:

- ValleyView Headquarters, which contains ValleyView's strategic documents, along with graphical interactions with key managers and other business administration staff
- ValleyView Intranet, which contains policy guidelines, important procedures, marketing materials, project reports, templates and staff development resources

- ValleyView Website, which contains a company profile, mission and goals, a list of products, contact details and job vacancies
- ValleyView Library, which contains extra references and miscellaneous material that could be useful for learners. The Library is the best place to find useful bibliographies and web links.

Many of the Toolbox tasks and activities refer to materials stored as resources at ValleyView. It is a research centre to help in solving the problems raised in the various parts of the Toolbox.

Here is the front page design of the ValleyView Website.

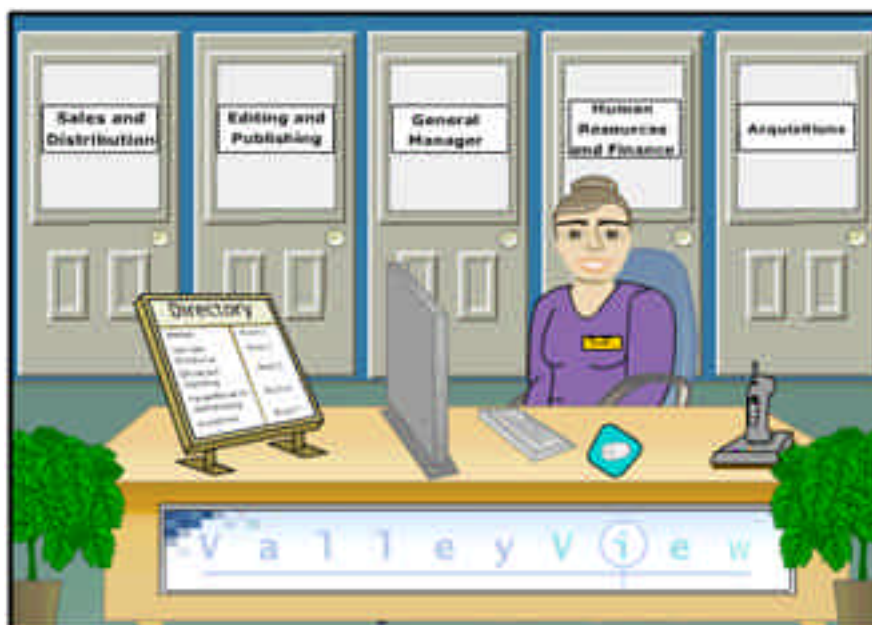


Here is the front page design of the ValleyView Intranet.



The ValleyView Intranet and Website contain many extra learning resources to help learners research and complete role-play activities.

The other major resource is ValleyView Headquarters. This is a unique graphical metaphor for the ValleyView company. It contains interactive multimedia learning objects as additional reference material. Here is the opening screen view of ValleyView Headquarters.



Each department in ValleyView Headquarters has its own graphical environment with active links to documents, audiovisual information and other multimedia elements.

The ValleyView Library is a separate reference point for books, videos, articles and external website links.

Here is the front page of the ValleyView Library.



Labels on the shelves prompt users to discover resources related to task and sub-task headings.

Communication

Email and a bulletin board (ValleyView Meeting room) are suggested collaborative learning tools for completing tasks, sub-tasks and project activities. RTOs are generally responsible for activating and maintaining communication facilities.

Communication is a crucial learning function. It is recommended that RTOs make available adequate communication technology and have clear policies to enhance clarity and responsiveness among teachers and learners. Such policies may include recommended types, nature and frequency of teacher–student communication.

Your project

The situation-based learning approach is best met by working through the project. There is a competency map to help identify how project tasks and sub-tasks relate to competencies and the various units in the Diploma.

Once a task is selected, the following learning tools become available from each page:

- **sub-tasks** for the workplace or ValleyView, which are explained in detail with key information help with the role-play or to guide reflection in a workplace context
- **key points**, which are summarised according to competency requirements
- **more info**, which provides separate topics notes, activities and other learning materials to address the competencies covered by the tasks. Learners can elect to use the topics to guide their responses to the tasks. For enhanced assessment purposes, teachers can tailor the activities in the topics and sub-topics. There is a self-assessment checklist directing learners to related topics and sub-topics.

The units

Another way to start learning is through the units. All the units for the Toolbox are linked from the homepage. Each unit covers the tasks and topics that make up the whole challenge faced by ValleyView Publishing – to establish a new multimedia branch office.

There is a choice between navigating through the units directly or working through the tasks and sub-tasks.

Learners may ask whether they should start learning through the units or through the project (Your project). For teachers, it is a matter of preference. Either pathway covers the competencies. The competency selection tool can help match gaps in learner knowledge, and this may determine the best learning path to take. In general, working through the project is recommended to fulfil problem-based learning objectives.

The importance of communication

Teaching in an online environment is a facilitative process. Learners have significant learning resources available to them in the Toolbox, in the workplace, and on the Internet. Helping the learner to navigate information and pinpoint the relevant materials to meet performance criteria is the central role of the teacher. It requires a clear statement of learning objectives and regular feedback on the student's progress. Email and the bulletin board (ValleyView Meeting room) are powerful communication tools when applied in this context.

Toolbox learning activities are designed to encourage student collaboration through the available communication tools. It is the teacher's decision how feedback should be given on this collaboration. The sub-tasks and various topic activities are customisable according to requirements; for example, a teacher might set up a discussion in the ValleyView Meeting room on how to format a meeting agenda. A starting and finishing date might be set for the discussion and a proportion of final assessment weighted to participation. Learners may be notified of these requirements by email and through an initial posting. The ValleyView Meeting room is a record of student contributions. This can be useful for assessment (with other tools).

There is a self-assessment checklist associated with each topic. Learners and teachers can track progress using these checklists.

How to use the Toolbox

Facilitation of learning is an important role for teachers in an online environment. Attention may be turned to helping learners navigate through the rich resources available in the Toolbox.

A situation-based approach is recommended and might follow these general steps.

Orientation

Meeting to discuss learner needs, competency mapping for identifying task/s best suited for learning and general Toolbox and online learning familiarisation.

–

Getting started

Teacher familiarises learner with the selected sub-tasks and determines whether any modification is needed for Toolbox activities.

Communication policies are established and agreed upon (that is, preferred modes of teacher–student and student–student interaction).

Assessment policies and processes are established and agreed upon.

Competencies and required evidence are discussed.

Evidence gathering opportunities, responsibilities and procedures are discussed; for example, learners may save files to an assessment folder for collation into a portfolio.

Student makes a start on selected parts of the project.

–

Progression

Student reads the project brief, becomes familiar with project tasks and sub-tasks, studies the key points and self-assessment and works through topics to fill knowledge gaps.

Topic activities encourage student collaboration.

Self-assessment checklists enable tracking of progress.

Learner collects ongoing evidence of competency.

Student provides feedback to teacher as requested.

Teacher facilitates and coaches learner through learning sequences as required.

–

Conclusion

Learner organises and presents portfolio of evidence for assessment.
Teacher finalises competency assessment according to the feedback and other interactions during the Toolbox learning experience.

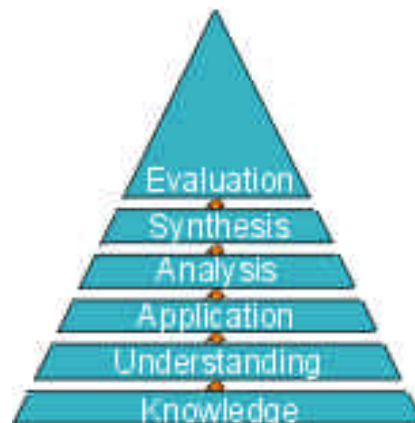
Level of learning

This Toolbox has been developed to allow teachers to apply a constructivist learning approach. Activities and tasks are industry-relevant, offer a multitude of practical situational models, and draw from original resources to help learners develop their own solutions to problems posed. Collaborative tools, such as the ValleyView Meeting room and email, can be used to encourage learners to interact.

Of course, this learning approach is only as powerful as the teacher using the model. The Toolbox is just that – a set of tools. If the tools are used inappropriately, learning may not be maximised. Teachers are encouraged to design sessions using sound educational theory.

Learners learn in a wide variety of locations with different levels of available resources. Communication skills also vary and can affect the value of the constructivist learning approach. Careful consideration should be given to the type of learning required at diploma level.

Toolbox resources tend to facilitate synthesis and evaluation in student learning. These higher-level skills are critical in problem-based or constructivist learning. Bloom's taxonomy supports this pedagogical view.



Blooms taxonomy
Adapted from Bloom, BS (1956)

The constructivist values of collaboration, personal autonomy, generativity, reflectivity, active engagement, personal relevance and pluralism as summarised by Lebow (1993) inform the instructional design of the Toolbox. The learning environment requires and supports the learners to use high-level thinking skills and a variety of tools and resources to undertake problem-solving activities and learning challenges.

Details of the units and their relationship with the project

BSBCM404A Develop teams and individuals

This unit is incorporated into one major task with two related sub-tasks. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of developing and conducting staff training and professional development is critical. By developing an ongoing training program for new and existing staff and developing a plan for improved work performances, either in ValleyView or a real workplace, learners will confront the competencies for the unit BSBCM404A Develop teams and individuals. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Develop and conduct staff training and professional development	Develop ongoing training program for new and existing staff	BSBCM404A/01 BSBCM404A/02 BSBCM404A/03
	Develop plan for improved work performances	BSBCM404A/01 BSBCM404A/02 BSBCM404A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 30

BSBCM404A/01 Determine development needs

Learning and development needs are systematically identified and implemented in line with *organisational requirements*.

A learning plan to meet individual and group training and development needs is collaboratively developed, agreed to and implemented.

Individuals are encouraged to self-evaluate performance and identify areas for improvement.

Feedback on performance of team members is collected from relevant sources and compared with established team learning needs.

BSBCM404A/02	<p>Develop individuals and teams</p> <p>Learning and development program goals and objectives are identified to match specific knowledge and skill requirements of <i>competency standards</i>.</p> <p><i>Learning delivery methods</i> are appropriate to the learning goals, the learning styles of participants and availability of <i>equipment and resources</i>.</p> <p>Workplace learning opportunities and <i>coaching and mentoring assistance</i> are provided to facilitate individual and team achievement of competencies.</p> <p>Development opportunities incorporate a range of activities and support materials appropriate to the achievement of identified competencies.</p> <p>Resources and timelines required for learning activities are identified and approved in accordance with organisational requirements.</p>
BSBCM404A/03	<p>Monitor and evaluate workplace learning</p> <p>Feedback from individuals or teams is used to identify and implement improvements in future learning arrangements.</p> <p>Outcomes and performance of individuals/teams are assessed and recorded to determine the effectiveness of development programs and the extent of additional development support.</p> <p>Modifications to learning plans are negotiated to improve the efficiency and effectiveness of learning.</p> <p>Records and reports of competency are documented and maintained within organisational requirements.</p>

Teacher's role

In the task, **Develop ongoing training program for new and existing staff**, learners are asked to collaboratively conduct an audit of learning and development needs in ValleyView or another workplace, and develop a learning program.

The learner is required to:

- communicate with other learners
- collaborate to identify organisational strategies and requirements
- assess the reasons for the main skills gaps and how they may be addressed
- make reasoned conclusions about training options.

In the task **Develop plan for improved work performances**, learners are asked to assume the role of team manager at ValleyView or another organisation and submit a report about the task of effective management and managing for improved team performance.

The learner is required to:

- communicate with other learners
- collaborate to identify team roles, strategies and requirements
- plan and allocate work for both teams
- monitor team performance
- evaluate and report the achievements of both teams.

The teacher will need to reach agreement with learners about how the teams might be formed and reports presented and submitted for each of the tasks.

To prepare the work appropriately, learners will be required to:

- identify leaning and development needs of self, others and teams
- collaboratively develop learning plans
- gather performance feedback
- evaluate performance of self, others and teams
- develop learning goals and objectives
- identify relevant learning delivery methods
- assess development opportunities and resources in accordance with organisational requirements
- use feedback to plan improvements in future learning programs
- modify learning plans to ensure effectiveness and efficiency of learning
- record learning competencies to meet organisational requirements.

It is not mandatory for the learner to complete the **more info** activities, however, the teacher may wish to encourage the learner to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback on postings.

Alternative approaches

The Australian workplace presents many opportunities for analysing and implementing training and work improvement plans. Learners may be able to describe and analyse examples from their own experience, or the teacher may prefer to offer case studies from real organisations.

A project may involve a research report into the training needs of a particular organisation, including those arising from performance feedback and skills audits.

BSBCM405A Analyse and present research information

This unit is incorporated into one major task with three related sub-tasks. Since the overarching project goal at ValleyView Publishing is to set up a new multimedia branch office, the task of determining a suitable location for the new office is critical. By developing a business brief, doing business research and presenting research findings professionally, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBCM405A Analyse and present research information**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Determine suitable location for new office	Develop a business brief	BSBCM405A/01 BSBCM405A/03
	Business research	BSBCM405A/01 BSBCM405A/02
	Present research findings professionally	BSBCM405A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 40

BSBCM405A/01 Gather and organise information

Information is gathered and organised in a format suitable for analysis, interpretation and dissemination in accordance with *organisational requirements*.

Information held by the organisation is accessed and assessed for accuracy and relevance in line with established organisational requirements.

Methods of collecting information are reliable and make efficient use of resources in accordance with organisational requirements.

Business technology is used to access, organise and monitor information in accordance with organisational requirements.

Information is updated, modified, maintained and stored in accordance with organisational requirements.

BSBCM405A/02 Research and analyse information

Objectives of research are clearly defined and consistent with organisational requirements.

Data used in research is valid and relevant to research purposes.

Research strategies are appropriate to the requirements of the research and make efficient use of available resources.

Methods of data analysis are reliable and suitable to research purposes.

Assumptions used in analyses are clear, justified and consistent with research objectives.

Conclusions are supported by evidence and contribute to the achievement of *business objectives*.

BSBCMN405A/03

Present information

Recommendations and issues are presented in an appropriate format, style and structure using suitable business technology.

Structure and format of reports are clear and conform to organisational requirements.

Research findings are reported and distributed in accordance with organisational requirements.

Feedback and comments on suitability and sufficiency of findings is obtained in accordance with organisational requirements.

Teacher's role

There is a natural progression through the sub-tasks from developing a brief, to conducting research and presenting research findings. Learners may be encouraged to become familiar with the project brief from the homepage, then proceed to the task, **Determine suitable location for new office** and the sub-tasks in the order described.

Opportunities for feedback are provided at the beginning of each sub-task where project activities are suggested for ValleyView or a real workplace. Teachers can begin the process of competency assessment at this early stage. Additional feedback is provided within the **more info** sections.

Learners may be encouraged to review the topics and activities under **more info** links, as well as revising the key points. This is for the purpose of gathering information to effectively complete the main project tasks. Each series of topics under **more info** concludes with a self-assessment checklist, which is useful for identifying gaps in learning and referring back to topics to ensure all competencies are covered.

The following is one example of a learning sequence.

From the learner's perspective:

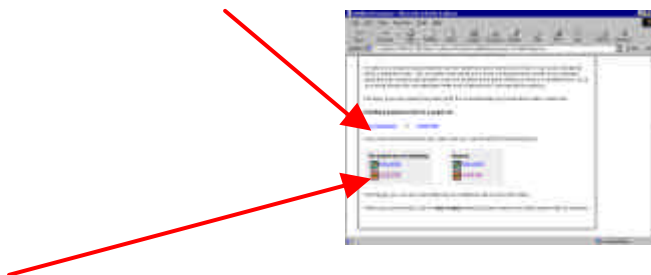
Read the **Project brief** and enter **Your project**.



Enter the sub-task **Develop a business brief** under the task category **Determine suitable location**.

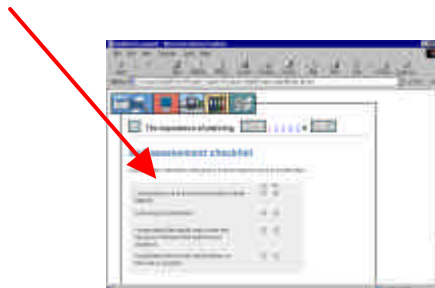


Commence the project tasks for **your workplace** or **ValleyView**.



Use **key points** and **more info** topics to develop the knowledge needed to complete the project tasks.

Be sure to complete the **self-assessment checklists** within the **more info** sections to gauge learning progress.



Submit activity feedback as required by the teacher.

From the teacher's perspective:

- Become familiar with the project brief, paying special attention to the map of competencies related to tasks and sub-tasks.
- Review project tasks for ValleyView and the workplace within the sub-task **Develop a brief** and decide which will serve the student best.
- Identify activities within each of the **more info** sections that students need to submit for competency assessment.
- Identify activities within each **more info** section for which students need to use the collaborative learning tools provided, such as the bulletin board (ValleyView Meeting room) or email.
- Facilitate learners through the process with a view to completing competency assessment as required.

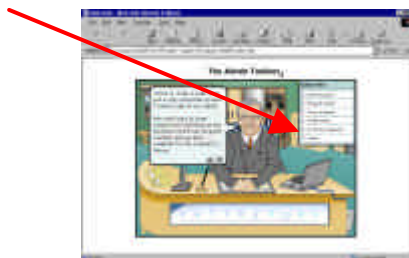
Alternative approaches

Another way to enter the Toolbox is by specific units of competency. This is a traditional way to address competencies, but less related to the situation-based approach of the Toolbox. However, the overarching project – to set up a new branch office – remains, and the tasks and sub-tasks are the same. By choosing to enter by units, the user simply bypasses the natural context of tasks in the project in favour of addressing tasks in relation to the competencies.

The following is an example of this approach for the unit **BSBCMN405A Analyse and present research information**.

From the learner's perspective:

Read **Project brief** and enter **Units**.





BSBCMN405A Analyse and present research information

To complete the unit BSBCMN405A Analyse and present research information, you need to work through the following project sub-tasks:

[Develop a business brief](#)

[Business research](#)

[Present research findings professionally](#)



[Technical requirements](#)

[Credits](#)

[Disclaimer](#)

© Australian National Training Authority (ANTA) 2002. All rights reserved.

Enter the sub-task **Develop a business brief** under the task category **Determine suitable location** and complete the main project tasks and other activities in the manner described in the previous section.

From the teacher's perspective:

- Become familiar with the project brief, paying special attention to the map of competencies relating the unit to tasks and sub-tasks.
- Review the project tasks for ValleyView and the workplace, within the sub-task **Develop a brief**, and decide which will serve the student better.
- Identify activities within each of the **more info** sections that the student needs to submit for competency assessment.
- Identify activities within each **more info** section for which the student needs to use the collaborative learning tools provided, such as the bulletin board (ValleyView Meeting room) or email.
- Facilitate learners through the process with a view to completing competency assessment as required.

BSBCM412A Promote innovation and change

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing and maintaining systems is critical. By reviewing existing procedures and adapting to new operations, either in ValleyView or a real workplace, learners will confront the competencies for the unit BSBCM412A Promote innovation and change. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish and maintain systems	Review existing procedures and adapt to new operations	BSBCM412A/01 BSBCM412A/02 BSBCM412A/03 BSBCM412A/04

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 50

BSBCM412A/01	<p>Identify and develop opportunities for improved work practices</p> <p>Options for change incorporate identified improvements to work practices and procedures.</p> <p><i>Risk factors</i> affecting change are analysed to identify potential constraints.</p> <p>Change is planned and resourced to promote the introduction and management of new processes.</p> <p>Benefits of <i>change</i> are clear and consistent with <i>organisational requirements</i>.</p> <p>Timelines and targets for implementation are realistic and support the achievement of change.</p>
BSBCM412A/02	<p>Lead team to foster innovative work practices</p> <p>Team members are selected to maximise innovative opportunities.</p> <p>Work assignments are organised to facilitate <i>innovative work skills</i>.</p> <p>Team members are provided with guidance and coaching on innovation in the workplace.</p> <p>Models of innovative work practice are provided and discussed.</p>

BSBCM412A/03	<p>Facilitate commitment to workplace change</p> <p>Opinions and suggestions on improving work practices are encouraged to facilitate participation in change processes.</p> <p>Goals and objectives of change are communicated clearly and promptly to individuals and teams.</p> <p><i>Business technology</i> is used to manage and provide access to information on progress towards objectives of change.</p> <p><i>Mentoring and coaching</i> is provided to support individuals and groups in introduction of change.</p> <p>Decisions to overcome problems in the implementation of change are made in consultation with designated individuals and groups.</p> <p>Effective relations and communications are maintained with clients and stakeholders during the process of change.</p>
BSBCM412A/04	<p>Monitor and evaluate change</p> <p>Organisation's systems and technology are used to <i>monitor progress</i> towards objectives.</p> <p>Team members are actively encouraged to reflect on team activities and opportunities for improvement and innovation.</p> <p>Team activities are evaluated based on feedback from team members, management, clients and other interested people.</p> <p>Suggestions for work improvements made by team members are positively received and acted on where appropriate.</p> <p><i>Evidence and information</i> on the impact of change is accurate, relevant and reported within organisational requirements.</p> <p>Recommendations for improving methods or techniques to manage change are negotiated with designated individuals and groups using appropriate <i>negotiation skills</i>.</p> <p>Systems, records and reporting procedures are maintained according to organisational requirements.</p> <p>Feedback on individual and group work practices is prompt and constructive.</p>

Teacher's role

Learners are asked to develop and present a plan for managing a significant change at ValleyView or in their own workplace.

While some ideas are suggested for the change topic, learners may prefer to develop their own plans. Whatever the topic chosen, it should be submitted to the teacher for approval.

The learner is required to submit a portfolio that includes:

- a written report and other resources used for the presentation
- any documents relating to the analysis of the resources used
- a description of any activities or exercises to be conducted with the team.

The teacher will need to specify how the portfolio should be presented and submitted.

To prepare the plan appropriately, learners will be required to:

- identify ways change can occur
- identify the consequences of failing to change
- identify and analyse internal and external forces for change in consultation with key players and stakeholders, taking account of resources available
- analyse the strategic focus of the administration department in reference to the goals of the organisation
- analyse their current situation
- identify reactions to change
- develop strategies to manage resistance to change
- develop strategies to involve and support team members
- develop an action plan for the implementation of the change
- allocate resources appropriately
- analyse staffing, work practices and resources
- analyse client trends
- reschedule work priorities as required
- develop staffing options
- set procedures to monitor future requirements.

While it is not mandatory for students to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is

valuable for learners if the online teacher monitors communications in the ValleyView Meeting room and provides appropriate feedback on the postings.

The **more info** section covers the following topics:

- Plan for workplace change
- Lead team to foster innovative work practices
- Facilitate commitment to workplace change
- Monitor and evaluate change.

Alternative approaches

Plan for workplace change

This topic covers the following:

- What is workplace change?
- Different ways change can occur
- Change is necessary for survival
- What are the forces for change?
- External forces for change
- Understanding the focus of administration
- Planning for change
- Allocation of resources to achieve change.

The topic **Plan for workplace change** provides scope for the teacher to introduce real case studies of organisations that:

- a) failed to change
- b) managed change successfully.

Significant learning can occur through from examining case studies and drawing conclusions.

Learners could be encouraged to research case studies to bring to the group for discussion and 'lessons learned' activities derived from the case studies.

Learners could undertake group research into the 'drivers of change' based on the book: Marsh et al (2002) *Strategic foresight: the power of standing in the future*, Crown Content, Melbourne, Australia, 2002.

Lead team to foster innovative work practices

This topic covers the following:

- What is innovation?
- Supporting innovation
- Characteristics that support innovation
- Organising work to facilitate innovative work skills
- Provide guidance and coaching to team
- Provide models of innovative practice.

The topic Lead team to foster innovative work practices provides opportunities for the teacher to introduce a range of guest speakers or case studies of innovative organisational leaders, and highlights:

- the characteristics of innovative leaders
- innovative work skills
- the motivation for people to be innovative.

Learners could be encouraged to research innovative leaders and the results of their innovative leadership and present their research to the class. It would be useful for the teacher to identify the motivations and characteristics of innovative leaders.

It would be useful if learners were guided in examining their own workplaces and work practices to see:

- if and how innovation is encouraged and supported
- what measures could be taken to encourage innovative work practices.

Facilitate commitment to workplace change

This topic covers the following:

- Analysing your situation
- More about workplace change
- Planned versus reactive change
- People and change
- Supporting and involving staff through change
- Communicate goals and objectives of change
- Use technology to facilitate change

- Provide mentoring and coaching to support change
- Consult on implementation problems.

This topic is highly suited to workplace application and provides perfect opportunities for workplace-based assignments.

An assignment could involve a student case studying their own workplace by identifying a planned change or a change that was introduced in their workplace. This change may have been planned in response to a changing environment or an increase in productivity or to meet future challenges.

Learners could then identify:

- how the need for change was determined
- who drove the idea for change
- how the need for change was promoted
- how staff responded to or accepted the change
- how new procedures and practices were introduced.

Learners could be required to conduct an in-depth case study for presentation to other learners.

Learners could also identify strategies for a more successful commitment to change in their workplace at the time.

Monitor and evaluate change

This topic covers the following:

- Review and monitor effectiveness
- Monitoring and evaluation
- Monitoring techniques
- Recording and reporting evaluation
- Providing feedback to team members
- Team reflection and discussion
- Respond positively to suggestions from the team
- Seeking feedback from others
- Assess impact of change
- Negotiate improved methods to manage change.

This topic has application across broad areas of the workplace. Learners could be asked to initiate a change in procedures or practices at their workplace and then apply monitoring, feedback and evaluation tools and strategies to assess their own change processes.

It will be important for the teacher to ensure that learners negotiate this change process with their workplace supervisor. The teacher may also need to approve the activity before the student approaches their workplace supervisor.

BSBADM501A Manage the establishment and maintenance of a workgroup network

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing and maintaining systems is critical. By determining equipment and network requirements, either in ValleyView or a real workplace, learners will confront the competencies for the unit BSBADM501A Manage the establishment and maintenance of a workgroup network. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish and maintain systems	Determine equipment and network requirements	BSBADM501A/01 BSBADM501A/02 BSBADM501A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 30

BSBADM501A/01 Manage the establishment of a workgroup network

Current and anticipated future *network requirements* are determined with the *nominated person/section/consultant* in accordance with organisational policy and budgetary constraints.

Selected network is compatible with current organisational software, hardware and work practices.

Equipment is obtained and installed in accordance with organisational requirements and the manufacturer's instructions.

Software is installed in accordance with organisational requirements and the manufacturer's instructions.

Establishment of the network promotes *efficiency and access for users*.

BSBADM501A/02 Manage the maintenance of a workgroup network

Records are established and maintained to ensure *control and security* of hardware and software stock in accordance with organisational policy and procedures.

Network problems are responded to and minor faults are *rectified* in accordance with organisational requirements.

Major problems are reported and *computer experts* consulted

in accordance with organisational policy and procedures.

Software is *filed and stored* in accordance with organisational procedures.

BSBADM501A/03

Assist and train network users

Training is provided for existing/new staff in using the network in accordance with their needs.

Network users are assisted to *maximise potential* of the network.

User skills are *examined* and feedback is provided to improve efficiency of network use.

Teacher's role

Learners are asked to manage the establishment and maintenance of a workgroup network at ValleyView or in their own workplace.

The learner is required to submit a report outlining the needs of a workgroup network, including size, number of access points, scalability, types of access required, types of software required and support and training needs.

If the learner has selected the ValleyView option, the teacher will need to ensure that the learner has negotiated an agreed plan of approach with the teacher. This will include nominating the type and size of the work group.

If the learner selects the workplace option, the teacher should clarify with them the nature and size of the workgroup with which they will be working.

The teacher will need to specify how the report should be presented and submitted.

While it is not mandatory for the learner to complete the **more info** activities, the teacher may wish to encourage them to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the main workplace or ValleyView task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the bulletin board (ValleyView Meeting room) and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback on postings.

The **more info** section covers the following topics.

- Manage the establishment of a workgroup network
- Manage the maintenance of a workgroup network
- Assist and train the network users.

Alternative approaches

Manage the establishment of a workgroup network

This topic covers the following.

- What is a workgroup network?
- Scalability and the future
- Shared resources
- Types of access
- Selecting system software
- Selecting application software
- Coordinate the installation of software
- Tracking software licences
- Storing physical media.

It is quite possible that some students will not be required to establish a workgroup network in their workplaces, so the teacher may need to guide the learners through the **more info** activities.

It would be helpful for learners if the teacher facilitated class presentations and guest speakers using computer consultants to discuss determining the need for and establishment of a workgroup network. This would highlight the fact that it is not necessary to have IT expertise, but it is necessary to know where to access relevant information and be able to negotiate with contractors and consultants.

One useful activity would be to provide learners with a scenario and require them to work collaboratively with other learners to develop a brief for a network consultant.

If learners work in a situation where there is no workgroup network, they could be required to prepare a feasibility study into the establishment of a workgroup network for their workplace. Learners could then present their research and recommendations to the learner group for discussion.

Manage the maintenance of a workgroup network

This topic covers the following:

- Security and access
- Responding to problems
- Fixing minor problems
- Fixing major problems
- Planned maintenance.

While it is likely that some learners will not be required to establish a workgroup network in their workplace, most of them will be responsible for the maintenance of a workgroup network. (It's the same old story: if something goes wrong with the computers or office equipment, it's the admin staff who have to solve the problem.)

This topic is suitable for workplace application. It will be meaningful if the teacher asks the learner to assess:

- security and access issues for their own workplace network
- procedures in their own workplace for responding to network problems
- procedures for fixing minor problems in their workplace
- procedures for fixing major problems in their workplace
- the network maintenance schedule at their workplace.

The learner could also develop a new procedures and a maintenance schedule for their workplace. If there is a nominated person already working in this role, the teacher should ensure that learners negotiate these activities with that person.

Assist and train the network users

This topic covers the following:

- Making the most of your network
- Provide training to new and existing users.

This topic is also suitable for workplace application. It provides learners with the opportunity to reflect upon their own workplaces and how a workgroup network can increase productivity and efficiency.

If the learner is working in an environment where there is an existing workgroup network, they could examine positive and negative aspects of the network and look at how the network might be improved.

The learner could also assess whether their network is being used to its full capacity and whether staff are able to make use of the network efficiently.

The learner could prepare a workplace evaluation and then develop a plan for ensuring efficient use of the network.

Once again, learners should negotiate any workplace-based activities with the workplace supervisor and other appropriate staff.

If the learner is working in an environment where there is not an existing network, they could embark upon an assignment that involves looking at how a workgroup network might help to increase productivity and efficiency. The assignment should also include a development plan for ensuring appropriate staff usage.

Once again, learners should negotiate any workplace-based activities with the workplace supervisor and other appropriate staff.

BSBADM502A Manage meetings

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of determining a suitable location for the new office is critical. By organising a meeting, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBADM502A Manage meetings**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Determine suitable location for new office	Organise a meeting	BSBADM502A/01 BSBADM502A/02 BSBADM502A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 30

BSBADM502A/01 Prepare for meetings

Purpose of meeting is clarified and the *agenda* developed in line with stated *purpose*.

The *style and structure* of the meeting is appropriate to the meeting's purpose.

Meeting participants are identified and notified in accordance with organisational procedures.

Meeting *arrangements* are confirmed in accordance with requirements of meeting.

Meeting *papers* are dispatched to participants within *designated timelines*.

BSBADM502A/02 Conduct meetings

Meetings are chaired in accordance with organisational requirements, agreed *conventions* for the type of meeting and *legal and ethical requirements*.

Meetings are conducted to ensure they are focused and time efficient.

Meeting facilitation enables participation, discussion, problem solving and *resolution* of issues.

Minute taker is briefed on recording meeting notes in accordance with organisational requirements and conventions for the type of meeting.

BSBADM502A/03 Follow up meetings

Transcribed meeting notes are checked to ensure they reflect a true and accurate record of the meeting and are formatted in accordance with organisational procedures and meeting conventions.

Minutes and other follow-up documentation are distributed within designated timelines and *stored* in accordance with organisational requirements.

Outcomes of meetings are reported as required, within *designated timelines*.

Teacher's role

The learner is asked to organise and chair a number of meetings at ValleyView or in their own workplace.

The learner is required to submit a portfolio of documents as follows:

for a formal meeting

- a description of their planning and preparation for the meeting
- planning documents for the meeting (such as timelines for venue bookings)
- copies of papers prepared for the meeting including:
 - notice of meeting
 - agenda
 - associated meeting documents (for example, annual report)
 - minutes of previous meeting
 - related correspondence

for a standing committee meeting

- an approved meeting proposal and associated documents
- minutes of the meeting

for chairing a meeting

- an approved meeting proposal
- two completed meeting evaluation checklists
- a completed self-assessment form.

The teacher will need to specify how the portfolio should be presented and submitted.

To prepare the portfolio appropriately, learners will be required to do the following.

1. Organise a formal meeting, such as an annual general meeting or board meeting. Organising the meeting should entail:

- developing the agenda
- identifying the appropriate participants
- arranging the time and venue for the meeting and notifying the participants
- preparing the meeting papers
- ensuring that the meeting papers are dispatched on time.

Follow-up after the meeting should entail:

- recording, circulating and filing the minutes
- recording and reporting outcomes of the meeting to management.

2. Organise a meeting of an ongoing group or standing committee, such as an occupational health and safety committee. The meeting may be in any format: face-to-face, videoconference, teleconference, real-time chat, or a mix of these. Learners should first submit a meeting proposal to the teacher for approval. The teacher should check that the proposals includes:

- the purpose of the meeting
- notice of meeting and agenda
- list of participants
- time and venue for the meeting
- associated correspondence
- timelines for associated tasks such as making room bookings.

Learners should attend the meeting and take minutes. They should follow-up after the meeting by:

- recording, circulating and filing the minutes
- recording and reporting outcomes of the meeting to management.

3. Chair a structured meeting. This may be an ad hoc meeting (for example, a meeting to resolve a work-related issue) or the meeting of a regular or standing committee. The meeting may be in any format: face-to-face, videoconference, teleconference, real-time chat or a mix of these.

The teacher should ask the learner to submit a meeting proposal for approval. The proposal should include:

- the purpose of the meeting

- the notice of meeting and agenda
- a list of participants
- the time and venue for the meeting
- associated correspondence
- timelines for associated tasks such as making room bookings
- a description of how the learner will conduct the meeting, including the degree of formality and decision-making protocols.

The learner should chair the meeting and arrange for someone to take minutes.

The teacher may need to assist those learners who are not involved in a workplace or organisation where they can undertake these activities. It may be necessary for the teacher to assist in arranging classroom-based or online meetings for those learners. Alternatively, the teacher may have contacts with organisations prepared to have students completing these activities in their organisations.

While it is not mandatory to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback.

The **more info** section covers the following topics:

- About meetings
- Developing an agenda
- Meeting style and structure
- Setting up a meeting
- Meetings in progress.

Alternative approaches

About meetings

This topic covers:

- Reasons for meetings
- Is a meeting the only option?

- When not to have a meeting
- Types of meetings
- Legal requirements of meetings
- Australian meeting laws
- Corporations law
- Invalid meetings.

This topic provides opportunities for learners to conduct independent research for reporting back to the learner group. The teacher could organise for learners to work collaboratively on their research topics and then present findings to the group.

If the learner is involved in an organisation (either working or as a volunteer), they could undertake a research assignment to find out about the sorts of meetings held in the organisation, the effects of legislation and other information relevant to the meetings held in the organisation.

Developing an agenda

This topic covers:

- Why an agenda is important
- Planning the agenda
- Developing the agenda
- Content of the agenda
- Formatting the agenda
- Altering the agenda.

Throughout this topic the learner is required to prepare a number of documents. It would be advantageous if the documents were related to a real workplace. If the learner is not engaged in a workplace, it would be useful for the teacher to create opportunities for those learners to have some real-life opportunities.

This is also an opportunity for the teacher to introduce guest speakers to demonstrate suitable agenda preparation.

Meeting style and structure

This topic covers:

- Managing effective meetings
- An effective chair
- Meeting options
- Synchronous communication: same time – same location

- Synchronous communication: same time – different location
- Asynchronous communication: different time – same location or different time – different location.

The teacher may wish to provide video demonstrations of effective and ineffective meetings. The teacher may also wish to employ various ‘meeting types’ and communication methods to deliver some class-based activities as a practical demonstration of meetings and communication options.

Setting up a meeting

This topic covers:

- Identifying participants
- How many?
- Arranging a date and time
- Venue
- Room set-up
- Catering for meetings
- Notifying participants
- Preparing participants
- Preparing and dispatching papers
- Dispatching papers.

Meetings in progress

This topic covers:

- The role of the chair
- Specific powers of the chair
- Meetings in progress
- Substantive and procedural motions
- Point of order
- Amendments
- Voting
- Do the techniques of chairing a meeting change with the medium?
- People are complex

- Dealing with conflict
- Conflict resolution
- Managing difficult situations
- Hidden agendas
- Functions of the minutes
- Consistency and variation
- Other recording issues
- Circulating the minutes.

This topic is highly practical in nature with a focus on doing rather than listening or reading.

There are many opportunities for the teacher to set up role-plays and scenarios. In a classroom the teacher could set up mock meetings where students could practise their meeting participation skills and play different roles.

BSBADM503A Plan and manage conferences

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of managing the office for a start-up period is critical. By planning future directions, either in ValleyView or a real workplace, learners will confront the competencies for the unit BSBADM503A Plan and manage conferences. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Manage office for start-up period	Plan future directions	BSBADM503A/01 BSBADM503A/02 BSBADM503A/03 BSBADM503A/04 BSBADM503A/05

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 30

BSBADM503A/01 Plan conference

Purpose, required outcomes and *style* of conference are confirmed with *conference convenor/s*.

Conference facilities requirements, *budget*, and preparation timeline are confirmed with conference convenor/s.

Speakers/presenters are identified and/or a call for papers is prepared in accordance with the purpose and style of the conference.

Conference program is drafted in line with stated purpose, and choice of *program elements* is balanced to allow outcomes to be achieved.

Speakers are selected, invited and briefed in accordance with the conference program.

Participant target group and projected numbers are identified in consultation with conference organisers.

Conference *administration requirements* are analysed and tasks, processes and resources planned to ensure efficient management of conference data and resources.

- BSBADM503A/02 Promote conference
- A promotion strategy* is established that reaches required number of target participants.
- Publicity material* is prepared in accordance with the promotion strategy and budget allocation/s, and dispatched within designated timelines.
- BSBADM503A/03 Organise conference
- Conference *arrangements* are made in accordance with booking lead times and budget allocation/s.
- Acceptances are recorded, fees receipted and participants confirmed within designated timelines.
- Participants' *special needs* are identified and catered for.
- Program details are confirmed and conference papers are prepared in accordance with speakers' requirements and conference timeline.
- Pre-conference information* is dispatched to participants within designated timelines.
- BSBADM503A/04 Coordinate conference proceedings
- Conference facilities are checked to confirm they meet agreed requirements.
- Participants are registered in accordance with planned *registration procedures*.
- Any late changes to the published program are communicated to participants.
- Contingency arrangements* are made to ensure the smooth running of conference.
- Speakers' schedules are managed and their conference requirements met throughout the conference.
- Administration requirements* during conference are managed in accordance with conference plan/schedule.
- BSBADM503A/05 Follow up conference proceedings
- Conference outcomes* are recorded, reported and/or followed up in accordance with organisational requirements.
- Conference papers are prepared for publication and distributed within designated timelines.
- Post-conference correspondence* is prepared and dispatched within designated timelines.
- Receipts and payments are finalised and conference funds acquitted in accordance with organisational procedures and audit requirements.

Teacher's role

Learners are asked to plan and manage a conference for their workplace. Clearly this would require significant workplace involvement and not every learner will be in a position to undertake these activities at work. The teacher will need to work with the learners who are undertaking the project at work to ensure that a record is kept of their completion of the tasks and competencies required for this section. The teacher will need to arrange for a workplace supervisor to provide third-party evidence of work completed.

Learners who are unable to complete the requirements in their workplace can work through the activities in each of the topics. The teacher will need to ensure that learners keep copies of all completed activities to submit for feedback or assessment.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback.

The **more info** section covers the following topics:

- Plan a conference
- Organise a conference
- Promote a conference
- Coordinate conference proceedings
- Evaluate conference proceedings.

Alternative approaches

Plan a conference

This topic covers:

- What is a conference?
- What types of conferences are there?
- Planning
- Conference documentation
- More planning
- Plan with a purpose
- Organise documents
- Beginning to plan.

While learners have been presented with a comprehensive case study within ValleyView Publishing, they may also choose to take advantage of a situation within their workplace. In this case the teacher will need to negotiate through the list of tasks and activities to ensure that the learner covers the elements of competency and the assessment criteria. Alternatively, the teacher may negotiate with the learner to complete some of the ValleyView tasks while using the workplace situation for other tasks.

The learners have been provided with an administration folder within the ValleyView Library. This is a collection of documents that provide a resource for their learning and planning. The folder is supposedly the personal resource file compiled by the person who organised the past two conferences. Learners have also been given a number of websites to visit for further information.

The administration folder is deliberately large and disorganised. Learners are often given differing and complementary examples and information to use when completing an activity. They must extrapolate from that information and examples to complete the activity.

The activities may be used by the teacher for assessment. Learners may submit their activities as part of their unit work and receive feedback. Alternatively, the teacher may decide to allow learners to modify their work as a result of feedback from the teacher and other learners and then submit a folio of work at the end of the unit.

Organise a conference

This topic covers:

- Clarify requirements
- Locate a venue
- Budget
- Develop a registration form and procedures
- Prepare a program
- Selecting a speaker.

If learners are completing the **more info** activities they may need to use their imagination when filling in some of the details for activities in this topic. It will be useful for learners to access some of the websites for information about current conferences and conventions.

Promote a conference

This topic covers:

- Preliminary tasks
- Identify the target audience
- Establish a promotional strategy

- Reaching your audience
- Preparing your message
- Develop the promotional timeline
- Arranging sponsorship
- Setting the promotional budget.

This topic may be a challenge for learners. They may be unused to developing promotional materials. The teacher may choose to introduce some activities that require collaboration between learners. There is also an opportunity for the teacher to introduce a number of workshop-type sessions using guest presenters.

Remember, it is also important for learners to build their skills in seeking information and appropriate expertise. The teacher could encourage them to find out about using consultants for corporate writing and preparation of promotional materials.

It is also an opportunity for learners to use the Internet to find examples of promotional materials for conferences.

Coordinate conference proceedings

This topic covers:

- Receive registrations and payments
- Transport materials and equipment to the venue
- One or two days before the conference
- On the day of the conference
- Personal presentation for registration desk staff
- Welcome delegates and speakers
- Brief staff
- Contingency plans.

This is a good opportunity for the teacher to introduce contingency planning, helping learners to plan for those unknown things that are bound to happen as the date of the conference draws closer.

If there are learners who are actually completing the conference preparations in their workplace, the teacher will be able to use those learners for presentations of 'lessons learned'. There is also an opportunity for learners who are not currently engaged in workplace preparations to assist those workplace-based learners.

Evaluate conference proceedings

This topic covers:

- Conference evaluation

- Participant evaluation form.

Learners may need further assistance in developing an evaluation strategy that is tied to the aims of the conference.

BSBADM504A Plan or review administration systems

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of managing the office for a start-up period is critical. By conducting ongoing review and assessment for new and existing operational procedures, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBADM504A Plan or review administration systems**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Manage office for start-up period	Conduct ongoing review and assessment for new and existing operational procedures.	BSBADM504A/01 BSBADM504A/02 BSBADM504A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 50

BSBADM504A/01 Plan or review administration systems

Requirements of, or modifications to, the administration system are identified through consultation with *system users* and other stakeholders in accordance with organisational and budgetary requirements.

Quotations from *suppliers* or *developers* of system are obtained in accordance with organisational policy and procedures

Selection of supplier or developer is made in accordance with organisational policy and procedures.

BSBADM504A/02 Implement new or modified administration system

Implementation strategies are identified and developed in consultation with staff.

Staff are encouraged to participate at all stages of the implementation process.

System is implemented in accordance with organisational requirements.

Procedures for using the system are defined and *communicated* to staff

Training and support is provided for staff on the use of the new or modified system.

Contingencies are dealt with to ensure minimal effect on users.

BSBADM504A/03 Monitor administration system

System is *monitored* for usage, *security* and output in accordance with organisational requirements.

System is modified to meet *changing needs* in accordance with organisational requirements.

Further modifications are clearly identified and users are notified.

Staff *training*

Teacher's role

Learners are asked to complete the tasks for this unit in a functioning workplace. If learners are not currently working, the teacher will need to assist them in finding a workplace where they will be allowed to undertake the work required to complete the unit.

It is important to ensure that the workplace management is aware of the learning requirements for this unit and agrees to allow the learner to implement an administrative system in their workplace.

The learner is required to:

- determine the requirements of an effective office administration system
- establish an office administration system and procedures
- implement the system
- monitor and review the system.

The learner is required to submit the following:

- evidence of a presentation of a system design and workplace approval to implement
- evidence that the system operates effectively
- a written report documenting the system, the process involved and the outcome.

It is important to note that these activities will take place over a significant period of time. The teacher will need to keep in regular contact with learners to ensure they are on track.

While it is not mandatory to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors communication in the ValleyView Meeting room and provides appropriate feedback on postings.

The **more info** section covers the following topics:

- Define an effective administrative system
- Identify current system operations
- Plan an effective system
- Implement the system
- Monitor and review the system.

Alternative approaches

Define an effective administration system

This topic covers:

- Types of systems
- Recognising aspects of an admin system
- Elements of a system.

The teacher can enhance this topic by providing other examples of systems, particularly electronic ones, so the learner can identify elements and components in other contexts.

The teacher could ask learners to research best-practice examples of effective administrative systems that they could then present as a case study to the class.

Identify current system operations

This topic covers:

- Establish organisational objectives for the selected system
- Consult with personnel affected by system operations
- Consult on quality
- Observe, research and record data about current system operations
- Clarify the problem.

The teacher may wish to take the activities in this section further and have the learners identify problem areas. Groups of learners could be facilitated to conduct an analysis of the problem areas they have identified.

Much of the focus in this section is on obtaining the correct information from a number of sources. The teacher may wish to have the learners submit their plans for obtaining information for checking before they proceed.

It would be useful to have learners practise a number of methods for obtaining information including:

- Conducting a focus group
- Developing a questionnaire
- Calling for submissions
- Setting up a quality circle.

Plan an effective system

This topic covers:

- Propose a variety of solutions
- Select the most effective solution
- Costs and benefits
- Plan an effective system
- Design an effective system
- Identify possible sources of supply and obtain quotes
- Call for tenders.

The activities related to this topic provide scope for the teacher to introduce a range of scenarios for learners to practise:

- brainstorming
- group decision-making (Quality Circles)
- analytical skills.

Learners could be asked to work collaboratively in completing some of the activities in this topic. Groups of learners could critique each other's system designs and provide feedback to each other.

There are also opportunities for the teacher to illustrate issues related to the costs and benefits of holding face-to-face meetings. Face-to-face meetings can be expensive in terms of time, money and resources, but can have many benefits; for example, participants are able to see gestures and body language and so can get the 'whole story' in discussions. Meetings can also motivate and strengthen teams. Looking at factors such as these will encourage learners to think 'beyond the square' in terms of costs.

Implement the system

This topic covers:

- Prepare an implementation plan and present it for approval
- Methods of implementation
- Develop procedures and circulate to staff
- Writing procedures
- Determine training requirements
- Skills gaps.

It will be useful for learners to present their implementation plans to the teacher or to other learners for feedback prior to presentation to their workplace supervisor. This leaves room for learners to receive feedback and improve on their plans.

Monitor and review the system

This topic covers:

- Establish process for monitoring correct use of system and set a review date
- Monitor usage to ensure that required outcomes are met
- Deal with contingencies, make modifications if required and notify users.

This topic would be well served by the introduction of a number of management tools as examples for reviewing and monitoring activities and systems. The teacher could ask learners to use some of those models to chart or review their own progress or achievement; for example, learners could prepare a Gantt chart for something of particular personal relevance such as study plans and achievements or home renovations.

BSBADM505A Manage payroll

This unit is incorporated into one major task with one related sub-task. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing a staff base is critical. By managing payroll services either in ValleyView or a real workplace learners will confront the competencies for the unit **BSBADM505A Manage payroll**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish staff base	Manage payroll services	BSBADM505A/01 BSBADM505A/02 BSBADM505A/03 BSBADM505A/04

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 30

BSBADM505A/01	<p>Establish procedures for the management of payroll</p> <p><i>Security procedures</i> are established that ensure the confidentiality and security of payroll information.</p> <p>Procedures ensure that claims for allowances are substantiated.</p> <p><i>Control measures</i> are established to safeguard the organisation's financial resources in accordance with <i>legislative and organisational requirements</i>.</p> <p>Systems are established to ensure that statutory obligations are met and records are kept for the period determined by government legislation.</p>
BSBADM505A/02	<p>Prepare payroll data</p> <p>Nominated industrial awards, contracts and government legislation are used to calculate gross pay and annual salaries.</p> <p>Statutory and voluntary deductions are calculated using government and employee documentation.</p> <p>Payroll data is provided to payroll processor for calculation within designated timelines.</p>

BSBADM505A/03	<p>Authorise payment of salaries</p> <p>Payroll is checked and salaries and wages are authorised for payment in accordance with organisational policy and procedures.</p> <p>Salaries, wages and deductions are reconciled in accordance with organisational policy and procedures.</p> <p>Salary, wage and related enquiries are dealt with in accordance with organisational policy and procedures.</p>
BSBADM505A/04	<p>Administer salary records</p> <p>Declaration forms for new and existing employees are processed in accordance with Australian Taxation Office requirements.</p> <p>Periodic deductions are forwarded to <i>nominated creditors</i> within <i>designated timelines</i>.</p> <p>Payments to government authorities are accurately prepared and dispatched in accordance with the relevant government legislation.</p> <p>Group tax amounts are calculated and/or transcribed and payments made in accordance with taxation procedures.</p> <p>Employee group certificate amounts are prepared and reconciled from salary records.</p>

Teacher's role

The learner is asked to develop a payroll services orientation and procedures manual for their own workplace or for ValleyView and to submit a copy of their manual.

If the learner is developing a workplace-based manual, they will be required to ensure that:

- management is aware of the proposed activities and has agreed to allow the development of a payroll services procedures and orientation manual
- they comply with all privacy, confidentiality and commercial in-confidence requirements
- they consult with the teacher regarding their approach to this task.

If the learner is developing a ValleyView manual, they must keep a record of the resources they consulted in developing the manual.

While it is not mandatory to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners.

It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback on postings.

The **more info** section covers the following topics:

- Establish procedures for managing payroll services
- Prepare payroll data for forwarding to head office
- Authorise payment of salaries
- Administer salary records.

Alternative approaches

Establish procedures for managing payroll services

This topic covers:

- Payroll management systems
- Establish procedures
- Security of payroll information
- Control measures
- Establish systems.

It is important that learners are aware of the complex legislation that governs the employment and remuneration of employees. It will be valuable if learners take time to investigate legislation that may apply to their workplace. It is also worthwhile to investigate relevant awards and certified agreements that may also be relevant. These investigations could be conducted individually or collaboratively.

This topic also provides opportunities to conduct some risk management exercises where the teacher poses a number of scenarios and learners are required to identify possible financial implications and develop appropriate procedures for minimising risks. Scenarios could include:

- employee termination dates not being recorded for the previous six months
- time sheets for gardening staff not been checked and authorised prior to payment
- WorkCover premiums not being paid to appropriate authorities.

This topic provides many opportunities for development of scenarios and hypothetical challenges relevant to the security and confidentiality of payroll.

Prepare payroll data for forwarding to head office

This topic covers:

- Calculate salary
- Deductions
- Meet timelines.

This topic may provide scope for learners to share their experiences in managing the preparation of payroll data. The teacher will need to bear in mind that some of the information will be subject to privacy and confidentiality laws.

There is opportunity in this topic for learners to conduct research into relevant legislation, awards and certified agreements for payment of staff, payroll deductions and so on.

Authorise payment of salaries

This topic covers:

- Check payroll
- Reconciliation
- Authorise payroll
- Respond to enquiries.

This topic provides opportunities to further explore risk management and internal control issues for the management of payroll services. As with the topic Establish procedures for managing payroll services, the teacher could create a number of case studies and scenarios for learners to solve or prevent from happening, such as the following:

- one of the administrative staff has reduced her time fraction from full-time to 0.6, however, this change has not been entered on the payroll system and she has been overpaid
- the person who usually authorises the payroll is away and there is no one else who can authorise the payroll.

Administer salary records

This topic covers:

- Declaration forms
- Distribute payroll deductions
- Payment requirements

- PAYG withholding
- PAYG payment summaries.

There is an opportunity in this topic for learners to conduct research into relevant legislation and taxation requirements for administering salary records.

There is also an opportunity for the teacher to pose a number of problems for learners to solve. These problems could be related to:

- tax free thresholds
- employees not providing tax file numbers
- HECS deductions
- salary packaging
- Fringe Benefits Tax
- superannuation payments.

BSBADM506A Manage business document design and development

This unit is incorporated into one major task with two related sub-tasks. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing and maintaining systems is critical. By determining document needs, and designing and developing documents, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBADM506A Manage business document design and development**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish and maintain systems	Determine document needs	BSBADM506A/01
	Design and develop documents	BSBADM506A/02 BSBADM506A/03 BSBADM506A/04 BSBADM506A/05

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 60

BSBADM506A/01 Establish documentation standards

Organisational requirements for information entry, storage, output, and quality of document design/production are identified.

The organisation's present and future information technology capability is evaluated in terms of its effect on document design and production.

The types of documents used/required by the organisation are identified.

Documentation *standards* are established for organisational documents in accordance with information, budgetary and technology requirements.

BSBADM506A/02 Manage template design and development

Standard formats / templates suit the purpose, audience and information requirements of each document.

Document templates enhance readability and appearance and meet organisational requirements for style and layout.

Templates are tested, organisational and user feedback is

obtained and amendments are made as necessary to ensure maximum efficiency and quality of presentation.

BSBADM506A/03	<p>Develop standard text for documents</p> <p><i>Complex technical functions</i> of software are evaluated for their usefulness in automating aspects of standard document production.</p> <p>Requirements of each document are matched with software functions to allow efficient production of documents.</p> <p>Macros are tested to ensure they meet the requirements of each document in accordance with documentation standards.</p>
BSBADM506A/04	<p>Develop and implement strategies to ensure the use of standard documentation</p> <p>Explanatory notes are prepared for the use of standard templates and macros using content, format and language style to suit existing and future users.</p> <p>Training on the use of standard templates and macros is developed and implemented, adjusting the content and level of detail to suit user needs.</p> <p>Master files and print copies of templates and macros are produced, circulated, named and stored in accordance with organisational requirements.</p>
BSBADM506A/05	<p>Develop and implement strategies for maintenance and continuous improvement of standard documentation</p> <p>Use of standard documentation templates and macros is monitored and the quality of documents produced is evaluated against documentation standards.</p> <p>Documentation standards are reviewed against the changing needs of the organisation, and improvements planned and implemented in accordance with organisational procedures.</p>

Teacher's role

Competencies for this unit are spread across two task areas:

- Determine documents standards
- Design and develop documents.

In the first instance learners are asked to determine documents standards at ValleyView or in their own workplace. In the second instance, learners are asked to design and develop a procedures manual for managing website standards for ValleyView or their own workplace.

The learner is required to prepare a guide for producing documents, which should include:

- samples of six types of documents most likely to be required
- information about the style and layout to be used in each case
- advice about the most cost-effective ways to produce each document
- details of filing and file naming protocols
- advice about accessing template, style guides and other relevant material.

The learner is then required to design, develop and produce the manual, which should include the following information:

- website accessibility
- website accuracy
- adding pages
- audience
- content authorisers
- content updaters
- copyright
- corporate look and feel
- dynamic and static content
- editing tips
- help
- hints and rules
- privacy
- publishing content on the organisation's website
- style
- templates
- timely content
- training
- website principles.

The learner should discuss their proposed approach to each task with the teacher. It is important for the teacher to remind them about design principles and the value of standards manuals and guides for organisations.

The teacher may need to assist the learner to find examples of website standards manuals and style guides.

While it is not mandatory to complete the **more info** activities, you may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provide appropriate feedback on postings.

The **more info** sections cover the following topics:

Determine document standards

- Identify requirements for document design and production

Design and develop documents

- Design documents
- Work with templates
- Monitor, evaluate and adjust documents.

Alternative approaches

Determine document standards:

Identify requirements for document design and production

This topic covers:

- Types of documents
- Document standards and templates
- Organisation requirements
- Costs
- Appropriate technology now and in future.

Design and develop documents:

Design documents

This topic covers:

- Managing document design
- Readability
- Meeting the organisation's requirements
- User testing.

Learners could audit their own workplace for documentation requirements and collect a range of document styles they think are good and poor examples of document design.

The activities and tasks in these topics could be integrated with some of the other units in this Toolbox; for example, learners could design a conference program and layout of promotional materials; develop a job description, advertisement and interview process for an appropriate position; or review and redevelop existing or exemplar records to meet emerging organisational needs.

Work with templates

This topic covers:

- Developing standard text
- Testing automated functions
- Helping others to use templates effectively
- User guides
- The master file
- Naming and storing master files
- Disseminating information about new templates and macros
- Training staff.

This topic provides opportunities for the teacher to introduce some IT challenges by having someone with appropriate IT skills conduct face-to-face classes in template development, automated functions, developing user guides, file naming and so on.

Monitor, evaluate and adjust documents

This topic covers:

- Continuous improvement
- Develop improvement strategies

- Implement improvement strategies
- Monitor and review
- Documentation standards and the organisation.

Learners could use the results of an earlier document requirements audit conducted in their workplace and assess the monitoring and evaluation processes.

Learners could research best practice examples of monitoring, evaluating and adjusting documents for presentation to the class.

Learners could prepare a guide or procedures manual for monitoring, evaluating and adjusting documents as required by their workplace.

BSBRKG502A Manage and monitor business or records systems

This unit is incorporated into one major task with two related sub-tasks. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing and maintaining systems is critical. By Developing operating procedures and record systems, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBRKG502A Manage and monitor business or records systems**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish and maintain systems	Develop operating procedures and record systems	BSBRKG502A/01 BSBRKG502A/02 BSBRKG502A/03 BSBRKG502A/04 BSBRKG502A/05 BSBRKG502A/06

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 40

BSBRKG502A/01 Develop key performance indicators for recordkeeping activities including compliance with system rules, standards and procedures.

Measurable performance indicators are developed for recordkeeping activities from the strategic plan in conjunction with those who will undertake the specific tasks based upon recordkeeping responsibilities and the business or records system in place.

The recordkeeping responsibilities of individual personnel/organisational units are *identified and documented*.

Acceptable range of variation for compliance is determined based upon recordkeeping responsibilities, the applicable records management system and the organisation's risk management analysis.

BSBRKG502A/02 Designate records use and maintenance responsibilities

Responsibilities for records use and maintenance activities are designated to staff in accordance with organisation policies and the abilities of individual staff.

Performance targets are set within the parameters of the

recordkeeping strategic plan.

Resources for the approved budget period are allocated in accordance with policies and strategic plan.

BSBRKG502A/03

Develop monitoring methodology

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.

The methodology developed includes the timeframes involved, means of surveillance, and form of reporting.

The methodology, performance criteria and the ranges of variation from the standards and rules are submitted to the *appropriate individual/body* for approval.

BSBRKG502A/04

Monitor a business or records system

Monitoring is undertaken in accordance with approved timeframes and frequency and staff being monitored are notified in accordance with organisational policies and guidelines, where applicable.

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.

Where required, *reports* are provided to the appropriate authority relating to records use and maintenance, and are in the required format, at the required intervals.

BSBRKG502A/05

Identify and respond to problems and changes

Problems and changes requiring a systemic response are identified from the monitoring reports and external events.

Recommendations are made for revisions to systems, procedures, and future (strategic) plans in response to identified variations, changes and problems.

Where they are required, amendments to systems are devised, and implementation planned in response to problems and changes that require a systemic response.

Recommendations for system amendments, and the planning and implementation required are prepared, and approval sought from the appropriate person or body.

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.

BSBRKG502A/06

Designate records creation and capture responsibilities

Responsibilities for record creation and capture activities are designated to staff in accordance with organisational policies.

Records creation and capture performance targets are set within the parameters of the recordkeeping strategic plan.

Resources for the budget period are allocated in accordance with organisational policies and strategic plan.

Teacher's role

Learners are asked to develop procedures and improvements to procedures for records systems at ValleyView or in their own workplace.

Learners are required to submit a document that provides:

1. a description of the type of organisation
2. an outline of the type of records kept by the organisation
3. a brief description of the people who utilise the records management system
4. an outline of the records management procedures taking into account the following: opening a new file, classification and indexing, file retrieval, file security, tracking of files, archiving and disposal of files
5. a description of the types of supplies used in the records system
6. a explanation of the equipment and facilities required by the records system
7. an idea of the budget (if known) allocated to establishing and maintaining the records system
8. a description of three problem areas
9. recommend solutions or improvements to the records management system.

While it is not mandatory to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the task described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provide appropriate feedback on postings.

The **more info** section covers the following topics:

- Identify appropriate needs, systems and responsibilities
- Develop a plan to monitor business/records systems
- Monitor the business/records system

- Implement a new, improved system
- Manage the creation and capture of records.

Alternative approaches

Identify appropriate needs, systems and responsibilities

This topic covers:

- What constitutes a record and what format can it be in?
- Why do we keep records?
- What is a records system?
- What is records management?
- Records retention and disposal
- Conducting a records management needs analysis
- Commence records management needs analysis
- Collect information
- Analyse information
- Report information
- Plan for improvement
- Identify a task
- Document activity and respond.

While the aim of establishing a record system may remain constant, the design, implementation and maintenance of a system will determine its ongoing format. The learning materials in this topic have been kept generic in an effort to cover both paper-based and electronic record control systems. The teacher should emphasise the range of options available and the factors that influence the choice of system for a workplace.

This topic may challenge the learner to plan for the future of the organisation and might incorporate considerable research of sample workplaces. The teacher may even consider inviting guests to participate in online discussions or classroom presentations.

Develop a plan to monitor business/records systems

This topic covers:

- Plan to monitor business/records systems

- Monitoring methods
- The plan.

While the aim of establishing a record system may remain constant, the design, implementation and maintenance of a system will determine its ongoing format. The learning materials in this topic have been kept generic in an effort to cover both paper-based and electronic record control systems. You should emphasise the range of options available and the factors that will influence the choice of system for a workplace.

The learning and activities in this topic are generic. It will be useful to encourage the learner to apply the general principles to specific situations. If the learner is not in the paid workforce, they should be encouraged to contact a local organisation as a sample workplace to contextualise their study.

Monitor the business/records system

This topic covers:

- Monitoring a business/records system
- Testing the system
- Variation
- Reporting.

While the aim of establishing a record system may remain constant, the design, implementation and maintenance of a system will determine its ongoing format. The learning materials in this topic have been kept generic in an effort to cover both paper-based and electronic record control systems. The teacher should emphasise the range of options available and the factors that influence the choice of system for a workplace.

Implement a new, improved system

This topic covers:

- Identify a system
- Follow the improvement process
- Implement improvement
- Identify training needs
- Identify training methods
- Develop a training plan
- Evaluate training and follow up.

While the aim of establishing a record system may remain constant, the design, implementation and maintenance of a system will determine its ongoing format. The learning materials in this topic have been kept generic in an effort to cover both

paper-based and electronic record control systems. The teacher should emphasise the range of options available and the factors that influence the choice of system for a workplace.

The activities in this section refer to a paper-based system. The teacher may wish to vary the activities by including reference to an electronic system. The learning points are the same, although learners using an electronic system will need to include reference to the technology infrastructure of the workplace and the rollout of the system if appropriate.

Learners who have chosen to work through the implementation of an electronic record system will include training that refers to the chosen system, including the use of a software package.

Manage the creation and capture of records

This topic covers:

- Creation and capture of records
- Roles
- Records and organisational planning
- Resources.

While the aim of establishing a record system may remain constant, the design, implementation and maintenance of a system will determine its ongoing format. The learning materials in this topic have been kept generic in an effort to cover both paper-based and electronic record control systems. The teacher should emphasise the range of options available and the factors that influence the choice of system for a workplace.

BSBHR506A Manage recruitment selection and induction processes

This unit is incorporated into one major task with two related sub-tasks. Since the overarching project goal at ValleyView Publishing is to set up a new branch office, the task of establishing a staff base is critical. By determining staffing needs, recruiting and selecting staff, and inducting staff, either in ValleyView or a real workplace, learners will confront the competencies for the unit **BSBHR506A Manage recruitment selection and induction processes**. Teachers may assess competency according to feedback provided during the project.

Task	Sub-task	* Related competencies
Establish staff base	Determine staffing needs	BSBHR506A/01
	Recruit and select staff	BSBHR506A/01 BSBHR506A/02
	Induct staff	BSBHR506A/01 BSBHR506A/03

*Integrated sub-tasks may cross over some competencies.

Unit competencies

Nominal hours: 60

BSBHR506A/01	<p>Develop recruitment selection and induction processes</p> <p>Strategic and operational plans and policies are analysed to identify relevant policies and objectives.</p> <p><i>Recruitment and selection processes</i> and relevant developments are developed.</p> <p>Appropriate technology is employed to improve the efficiency and effectiveness of the recruitment/selection process.</p> <p>Specialists are utilised for those parts of the process which are necessary.</p> <p>Content and methodology for induction processes are agreed and documented (induction plan).</p> <p>Forms, procedures and induction processes are trialled and measured against objectives.</p> <p><i>Performance gaps</i> are analysed and improvements introduced prior to implementation.</p>
BSBHR506A/02	<p>Recruitment and selection of staff</p> <p>Future human resource needs are determined in collaboration with <i>relevant managers and sections</i>.</p> <p>Position descriptors and person specifications for vacancies</p>

are provided to *relevant managers* and updated where appropriate.

Training and assistance is provided to all persons involved in the recruitment/selection process.

Vacant positions are *advertised* in accordance with organisational policy and advertisements meet all legal requirements.

Selection procedures are implemented in accordance with organisational policy and legal requirements.

Applicants are advised of selection outcome.

Terms and conditions of employment and *probation period* are advised to successful applicants.

BSBHR506A/03

Manage induction of staff

Training and assistance is provided to all persons engaged in inducting staff.

Induction is undertaken in accordance with the induction plan.

Employees are assessed at the completion of the induction program.

Feedback is obtained from participants and relevant managers on the extent to which the induction process is meeting its objectives.

Improvements are introduced to the induction process in accordance with feedback received and organisational policies.

Probationary employees are performance managed and provided with feedback until their employment is confirmed.

Teacher's role

The activities for this unit have been spread across three tasks:

- Determine staffing needs
- Recruit and select staff
- Induct staff.

Learners are asked to determine staffing needs, conduct recruitment and selection and plan and conduct induction at ValleyView or in their own workplace.

Tasks vary according to the learner's choice to undertake the tasks at ValleyView or in their own workplace. The teacher will need to be familiar with the different requirements for each option.

The ValleyView option for Determine staffing needs requires the learners to consider the role of the Project Manager at ValleyView, analyse the need for the position,

prepare an appropriate position description and make recommendations about other staffing needs for the new multimedia operations of ValleyView.

The workplace option for **Determine staffing needs** requires the learner to analyse their current or recent position description and identify staffing gaps within their workplace. They are then required to make recommendations for filling those staffing gaps.

The ValleyView option for **Conduct recruitment and selection** requires the learner to develop interview questions for a position at ValleyView and then manage a mock selection process.

The workplace option for **Conduct recruitment and selection** requires the learner to develop interview questions for a position at their own workplace and then manage a mock recruitment process. It is important that the learner consult with their workplace supervisor or human resources manager regarding this activity.

The ValleyView option for **Plan and conduct induction** requires the learner to develop an orientation and induction kit for ValleyView.

The workplace option for **Plan and conduct induction** requires the learner to assess and prepare a report on the induction process at their workplace.

While it is not mandatory to complete the **more info** activities, the teacher may wish to encourage learners to work through these sections. Many of the activities in the **more info** sections are quite complex and could be used as an alternative to the tasks described above.

The **more info** activities and tasks provide an opportunity for learners to build upon their current skill and knowledge base in order to tackle the main task described above.

Many of the activities in the **more info** section call upon the learner to post a message to the ValleyView Meeting room and communicate with other learners. It is valuable for learners if the online teacher monitors the ValleyView Meeting room communications and provides appropriate feedback on postings.

The **more info** section for **Determine staffing needs** covers the following topic:

- Recruitment planning.

The **more info** section for **Recruit and select staff** covers the following topic:

- Select people.

The **more info** section for **Induct staff** covers the following topic:

- Inducting people.

Alternative approaches

Determine staffing needs

This topic covers:

- Process overview
- Strategic backdrop
- The goal of HR planning
- Evaluating the need for the position
- Recruitment
- Adhering to legal requirements
- Guidelines and policies
- Requirements of the organisation
- Conducting a job analysis
- Using technology
- Guidelines to relevant legislation
- Recruitment
- Channels and use of specialists
- Induction planning
- Performance gaps.

This topic provides opportunities for the teacher to introduce guest speakers to discuss issues such as:

- workforce planning
- succession planning
- strategic planning
- human resources management systems
- skills analysis
- job design
- performance gap analysis.

It will be valuable for learners if the teacher encourages them to work collaboratively to undertake projects that may come out of the presentations listed above.

Select people:

This topic covers:

- Position specification and selection criteria
- Why is training important?
- Staff involved in recruitment and selection process
- Advertising the position
- Job application form
- Ranking and short listing applicants
- The interview
- Interview preparation
- Conducting the interview
- Types of interview
- Points to remember when interviewing
- Interview questions
- Selection testing
- Selecting the successful applicant
- Notifying applicants
- Employment documentation.

The teacher may wish to encourage learners to seek real interview situations in their workplace or a community situation. They can then describe, review and reflect on the interviews that they observe.

Role-play provides excellent learning opportunities for participants and observers. The teacher could conduct mock interviews and selection processes in a classroom setting.

Inducting people:

This topic covers:

- Designing an induction program
- Coordinating the induction process
- Rating induction programs
- Training the induction coordinator

- Induction feedback
- Managing the probation period
- Confirmation of permanent employment
- Induction and performance.

The teacher should ensure that learners using a workplace example can demonstrate that their induction checklist meets the requirements of their workplace.

This topic is also well suited for presentations from guest speakers working in human resources management.

How the units match with the situation-based approach

Situation or problem-based learning means the situations guide the learning rather than the units being the focus of the learning. As the learner enters the project (**Your project**), there is a competency selection tool to show how the units of competency match with performance criteria and the tasks and sub-tasks provided. The learner and teacher can use this tool to map the competencies being covered.

Opting to work through the units directly from the homepage also brings users to the competency map. This means there are two pathways to the same learning outcome. The project remains the centre of the learning.

Approach to assessment of competency

No materials within the Toolbox are presented as self-contained assessment tools. Competency assessment is outside the scope of the Toolbox; however, the materials have been conveniently mapped against units from the diplomas and related competencies. Teachers will find a comprehensive bank of resources for assessment. Ultimate responsibility for assessment is with the RTO and moderation processes need to be applied according to the AQTF.

Technical guide

Installing the Toolbox

If you have access to the server that will house the Toolbox:

1. insert the Toolbox CD-ROM into your CD-ROM drive
2. open a directory browser (for example, Microsoft Windows Explorer)
3. copy the entire contents of the CD-ROM minus the _SOURCE\ folder to the desired directory on the server. This will require approximately 150MB of free space on the server. It is important that you do not copy the _SOURCE\ folder to the server, as this will consume an additional 105MB of space.

or

4. to install a single unit, copy all of the following files and folders
 - *.*
 - \COMMON
 - \TASKS\
 - \TOPICS\
 - \UNITS\UNITCODE folder, where *UNITCODE* is the unit code of the unit you wish to install.

If you experience difficulty in accessing the Macromedia Flash components of the Toolbox, it may be necessary to set the appropriate mime types for Flash (application/x-shockwave-flash). This should not be necessary for most installations.

This Toolbox uses client-side technologies only; so it will not be necessary to configure anything further to start using the Toolbox.

If you do not have direct access to the server that will house the Toolbox, it is not recommended that you attempt to upload the Toolbox to a site via a modem connection. Contact your Internet service provider or server administrator for advice on how to install the Toolbox to your server.

Communications tools

It is recommended that a bulletin board be made available for learners and teachers. Collaborative learning activities throughout the Toolbox discuss the use of a bulletin board (ValleyView Meeting room).

An arrangement to ensure all users have email accounts should also be considered. The electronic environment of the Toolbox tends to facilitate use of email and Internet connections.

To link your communication tools to the Admin Toolbox₂, simply insert links to your tools into the ValleyView Meeting room page. This page can be found at \COMMON\COMM\INDEX.HTM

Customisation

The Admin Toolbox₂ consists of a number of different learning resources including:

- text
- graphic animations
- audio clips
- video clips
- scripts for audio and video clips
- interactive activities.

You may choose to use the Admin Toolbox₂ 'as is', use only selected components or replace or edit selected components. The materials in this Toolbox have been created in industry standard formats to facilitate easy customisation and modification with standard web editing tools.

- HTML documents can be edited with any HTML 4.01 or XHTML 1.0 compliant web page editor (for example, Macromedia Dreamweaver or Microsoft FrontPage).
- Graphic images (JPEG and GIF files) can be edited with any graphics program that supports these formats (for example, Adobe PhotoShop).
- Flash animations and interactions can be edited with Macromedia Flash version 5 (or later).
- RTF documents can be edited with any word processing program that supports this format (for example, Microsoft Word).

To edit or replace a particular resource, simply determine the location of the resource using the directory structure table (below) and edit the appropriate files as required (all Flash animation source files are located in the /_source/ folder).

Directory structure

The various files and resources that comprise the Admin Toolbox₂ have been assembled in a modular fashion to make it easier to extract and use individual components. The table below shows how the files for each resource are organised. Every folder listed can be copied to the desired location and used independently of the rest of the Toolbox. In each case, the start page for each resource is always named index.htm, and is located at the root level of the appropriate folder.

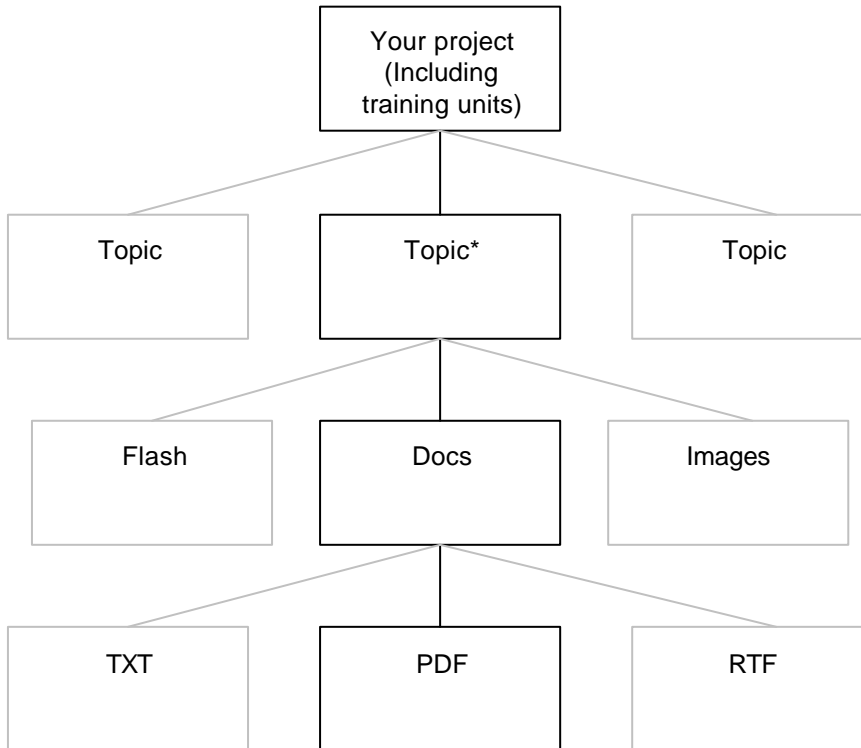
File or folder name	Description
---------------------	-------------

File or folder name	Description
/_SOURCE/	Contains all of the source files for multimedia resources.
/INDEX.HTM	The start page for the Admin Toolbox ₂ .
/COMMON/VV/	Folder containing all of the ValleyView resources for the Admin Toolbox ₂ .
/COMMON /VV/HQ/	Folder containing the ValleyView Headquarters resources for the Admin Toolbox ₂ .
/COMMON /VV/WEBSITE/	Folder containing the ValleyView Website resources for the Admin Toolbox ₂ .
/COMMON /VV/INTRANET/	Folder containing the ValleyView Intranet resources for the Admin Toolbox ₂ .
/COMMON /VV/LIBRARY/	Folder containing the ValleyView Library resources for the Admin Toolbox ₂ .
/TOPICS/	Folder containing all of the training units disaggregated into topic numbers and titles.
/UNITS/	Folder containing the training units index pages with links to relevant topic numbers and titles.
/TASKS/	Folder containing the tasks and sub-tasks with links to relevant topic numbers.
/TASKS/MATRIX.HTM	The competency selection tool page showing how the topics, tasks and sub-tasks relate to units and competencies.
/TASKS/INDEX.HTM	The Your project page for the Admin Toolbox ₂ .
/TOPICS/TOPICXY	Fifty-three separate folders containing the unit materials in disaggregated chunks. Refer to the competency selection tool for relationship mapping.

Structure within each topic

Each topic in the Admin Toolbox₂ has the same file and folder structure.

A unit is composed of a number of topics. Each topic contains a number of materials categories. This hierarchical structure is illustrated in the diagram below.



** Note that in most cases a topic roughly corresponds to an element of competency.*

Any of the blocks shown in the diagram above may be copied to a desired location and used independently of the rest of the Toolbox; however, many activities make reference to various parts of the resources section, so these should always be accessible or the references removed.

Using a learning management system

While the Toolbox has been designed as a self-contained set of resources with its own inbuilt navigation systems, individual components can easily be transferred to a web-based learning management system.

If your learning management system has its own in-built navigational tools, you will need to remove the navigational elements in the Toolbox before transferring it to your learning management system.

Accessibility

The Toolbox has been designed to comply with the W3C Priority 1 level guidelines.

Text alternatives

Where audio or other media have been used in the Toolbox, text alternatives have been provided.

Screen reader-friendly

The Toolbox is designed to be screen reader-friendly, making use of hidden links where possible. All browser pages have been developed to the XHTML standard as approved by W3C World Wide Web Consortium.

Easy clickable icons

The navigation structure has been kept as simple as possible. Features include large icons with large click zones.

Easy to navigate interface

The Toolbox has been designed with an interface that is easy to navigate. There are limits to the number of active windows at any one time. The prominent menus help track progress through the materials. There is an intuitive flow from the overarching strategic objective through to tasks, sub-tasks and project activities. Each level in the navigation structure contains the simple menu allowing users to move in and out of levels and other resources as required.

Learning reinforcement

All learners benefit from the use of frequent reminders to improve memory retention. The Toolbox employs key point summaries and self-assessment checklists as prominent reminders to repeat and reinforce key points.

Common problems

Q: Why does the text and layout on my customised pages look different from the rest of the Admin Toolbox?

A: The most likely reason is that you have accidentally broken a link to the Cascading Style Sheet that controls how fonts and text appear on the screen. Each HTML document should contain the following code to link to the style sheet:

```
<link rel="stylesheet" href="<path>/text-styles.css">
```

where <path> is the relative path of the folder containing the text-styles.css file (by default this is stored in the root folder within the Admin Toolbox folder hierarchy).

Q: Images are missing or activities are not functioning as expected.

A: The most likely reason is that folders have been moved within the unit, tasks, topic or sub-topic. Simply restore the folder hierarchy to its original state, or edit the HTML files to reflect the changes you have made to the folder structure.

Help desk

If you need technical assistance with a Toolbox, a single Help Desk call is all that is needed. The number is (02) 6230 5349 or you can email: Toolboxhelp@flexiblelearning.net.au

Competency matrix for all the units and tasks

This database is presented in a user-friendly matrix as a competency selection tool in the Toolbox. It is included here in raw form to show the mapping process.

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBHR506A Manage recruitment selection and induction processes	Determine staffing needs	Recruitment planning	BSBHR506A/01	Establish staff base
	Recruit and select staff	Selecting people	BSBHR506A/01 BSBHR506A/02	
	Induct staff	Inducting people	BSBHR506A/01 BSBHR506A/03	

To complete the unit ...	work through the sub-task ...	including the topics ...	dealing with the competencies ...	that are part of the task ...
BSBADM502A Manage meetings	Organise a meeting	About meetings	BSBADM502A/01 BSBADM502A/02 BSBADM502A/03	Determine suitable location for new office
		Developing an agenda	BSBADM502A/01	
		Meeting style and structure	BSBADM502A/01	
		Setting up a meeting	BSBADM502A/01	
		Meetings in progress	BSBADM502A/02 BSBADM502A/03	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBCM405A Analyse and present research information	Develop a business brief	The importance of planning	BSBCM405A/01	Determine suitable location for new office
		Structuring	BSBCM405A/03	
	Business research	Research needs	BSBCM405A/01	
		Define the research	BSBCM405A/01	
		Conduct the research	BSBCM405A/02	
	Present research findings professionally	Plan the report	BSBCM405A/01 BSBCM405A/03	
		Write the report	BSBCM405A/03	
		Present the report	BSBCM405A/03	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBADM501A Manage the establishment and maintenance of a workgroup network	Determine equipment and network requirements	Manage the establishment of a workgroup network	BSBADM501A/01	Establish and maintain systems
		Manage the maintenance of a workgroup network	BSBADM501A/02	
		Assist and train network users	BSBADM501A/03	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBRKG502A Manage and monitor business or records systems	Develop operating procedures and record systems	Identify appropriate needs, systems and responsibilities	BSBRKG502A/01 BSBRKG502A/02	Establish and maintain systems
		Develop a plan to monitor business/records systems	BSBRKG502A/01 BSBRKG502A/02 BSBRKG502A/03	
		Monitor the business/records system	BSBRKG502A/03 BSBRKG502A/04	
		Implement a new/improved system	BSBRKG502A/05	
		Manage the creation and capture of records	BSBRKG502A/06	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBADM505A Manage payroll	Manage payroll services	Establish procedures for managing payroll services	BSBADM505A/01	Establish staff base
		Prepare payroll data for forwarding to head office	BSBADM505A/02	
		Authorise payment of salaries	BSBADM505A/03	
		Administer salary records	BSBADM505A/04	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBCMN412A Promote innovation and change	Review existing procedures and adapt to new operations	Plan for workplace change	BSBCMN412A/01	Establish and maintain systems
		Lead team to foster innovative work practices	BSBCMN412A/02	
		Facilitate commitment to workplace change	BSBCMN412A/03	
		Monitor and evaluate change	BSBCMN412A/04	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBADM506A Manage business document design and development	Determine document needs	Identify requirements for document design/production	BSBADM506A/01	Establish and maintain systems
	Design and develop documents	Design documents	BSBADM506A/02 BSBADM506A/03 BSBADM506A/04	
		Work with templates	BSBADM506A/02 BSBADM506A/04	
		Monitor, evaluate and adjust documents	BSBADM506A/05	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBCMN404A Develop teams and individuals	Develop ongoing training program for new and existing staff	Identify the development needs of staff	BSBCMN404A/01	Develop and conduct staff training and professional development
		Develop a learning plan	BSBCMN404A/01 BSBCMN404A/02	
		Implement programs and opportunities for development	BSBCMN404A/02 BSBCMN404A/03	
		Teams and individuals	BSBCMN404A/02	
		Setting team and individual goals	BSBCMN404A/01 BSBCMN404A/02 BSBCMN404A/03	
	Develop plan for improved work performances	Monitoring team performance	BSBCMN404A/03	
		Evaluating achievements	BSBCMN404A/03	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBADM503A Plan and manage conferences	Plan future directions	Plan a conference	BSBADM503A/01	Manage office for start-up period
		Organise a conference	BSBADM503A/03	
		Promote a conference	BSBADM503A/02	
		Coordinate conference proceedings	BSBADM503A/04	
		Evaluate conference proceedings	BSBADM503A/05	

To complete the unit ...	work through the sub-task ...	including the topic ...	dealing with the competencies ...	that are part of the task ...
BSBADM504A Plan or review administration systems	Conduct ongoing review and assessment for new and existing operational procedures	Define an effective administrative system	BSBADM504A/01	Manage office for start-up period
		Identify current system operations	BSBADM504A/01 BSBADM504A/03	
		Plan an effective system	BSBADM504A/01	
		Implement the system	BSBADM504A/02	
		Monitor and review the system	BSBADM504A/03	

References

Bloom, BS (Ed.) (1956) *Taxonomy of Educational Objectives: The classification of educational goals: Handbook I, Cognitive domain*. New York, Toronto: Longmans, Green.

Brown, John S (Feb. 2002) *Growing up Digital: How the web changes work, education and the ways people learn*. *USDLA Journal*, Vol. 16, No. 2. Available online at http://www.usdla.org/html/journal/FEB02_Issue/article01.html [accessed 19 July 2003].

Cross, KP (1981) *Adults as Learners: Increasing participation and facilitating learning*. Jossey-Bass Inc. London.

Lebow, D (1993) *Constructivist Values for Systems Design: Five principles toward a new mindset*. *ETR&D*, Vol. 4, No. 3.

Lefoe, G (1998) *Creating Constructivist Learning Environments on the web: The challenge in higher education*. Centre for Educational Development and Interactive Resources, University of Wollongong.

Muilenburg, L & Berge, Z (March 2002) *A Framework for Designing Questions for Online Learning*. Berge Collins Associates Available online: <http://www.emoderators.com/moderators/muilenburg.html> [19 July 2003].

Nowak, J and Plucker, J (June 1999) *Student Assessment in Problem-Based Learning*. Indiana University. Available online: <http://www.indiana.edu/~legobots/q515/pbl.html> [accessed 19 July 2003].