



## Recognition of Prior Learning and Assessment Kit

### BSB40507 CERTIFICATE IV IN BUSINESS ADMINISTRATION

RTO: Australian Salesmasters Training Company ABN	NTIS Id: 6854	Document No:	Page 1
Document Id: BSB40507 Certificate IV in Business Administration RPL & Assessment Resources Kit	Modified on: 12/10/2010 by Brian Roberts		Version: NSW1
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## ABOUT THIS KIT

This RPL Kit is designed as a self assessment tool to determine whether you are able to provide evidence sufficient for judgements on whether you are competent against units of competency in the Training Package/Qualification undertaken.

This evidence must especially be sufficient, current, reliable, valid and authentic.

This Kit provides assistance to not only confirm which units of competency may be required, but also the basis upon which you should collect evidence for each unit of competency chosen. It does not provide all the detail on each unit of competency, or the qualification as is only available from the full Training Package.

## WHAT IS RPL?

Recognition of Prior Learning (RPL) under the Australian National Training Quality Framework is a formal process whereby a person's skills and knowledge acquired through previous training, work, or life experience may be used to grant status or credit in a subject, module, or course.

In the RPL process evidence is collected against the skills and knowledge requirements for the unit of competency or its constituent elements. If recognition is granted then where that unit or units of competency form part of a course the candidate can be credited with the equivalent parts of a course (statement of attainment), or even an entire qualification.

## FIVE EASY STEPS TO RPL

1. Read this RPL Kit to determine what you can do and where you wish to gain recognition for your prior learning.
2. For those units of competency being sought examine in detail and reflect on their associated elements and performance criteria.
3. Use the 'Guide to collection of evidence' for each unit of competency to translates the technical detail of the competency standard into a self-assessment approach that permits you to identify where you can provide evidence in the form of credentials, observation reports, written testimonials, or in a portfolio.
4. Collect, sort and package the relevant evidence against each unit of competency.
5. Complete the RPL Kit's cover sheet, check that all relevant forms have been signed and included, and after copying the completed package, submit the evidence and all the completed sheets in this Kit to the Registered Training Organisation for assessment.

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## HOW MUCH EVIDENCE IS REQUIRED

When the Trainers are assessing your portfolio of evidence they will be looking for the quality of your evidence submitted. The quality of evidence submitted would be more important than the quantity of evidence that you provide. Evidence must be relevant to the unit of competency. You will need to demonstrate that you have the required skills and knowledge that meets the standards identified in the performance criteria for the unit. You must consider that the evidence that is submitted demonstrates your competency through various examples.

## TYPES OF EVIDENCE FOR RPL

In order to be found competent in this unit you must provide evidence sufficient for judgement by an independent assessor. This Kit suggests three forms of evidence may be collected and packaged. They include:

### 1. Qualifications (copies must be certified)

This evidence is the most unambiguous and easy to present. It represents the provision of formal qualifications issued by a Registered Training Provider (RTO). Qualification from an RTO may be the complete qualification for a course (i.e. Certificate Iv in Training and Assessment), or for units of competencies gained that credit towards such a qualification.

**Statements of Attainment** are where an AQF qualification is partially achieved through the achievement of one or more endorsed units of competency, an RTO may issue a Statement of Attainment. Issuance of Statements of Attainment must comply with the advice provided in the *AQF Implementation Handbook* and the *AQTF Standards for Registered Training Organisations*.

Qualifications presented may also include those from tertiary institutions or other providers that hold equivalency to the units of competency (i.e. the extent to which a person's acquired knowledge or skills satisfy the competency requirements). Other training providers such as in-house, community and various unaccredited providers may also grant awards that the applicant presents as evidence of learning in the field of endeavour covered by the unit of competency.

Copies of qualifications submitted as evidence must be certified.

### 2. Observation /Third Part Report

This evidence requires the presentation of an independent report by a qualified observer confirming the applicant has individually or collectively achieved the competency outcomes, performance criteria, skills and knowledge of this competency standard to be demonstrated. Such reports hold greater validity when they come from independent individuals with the verified expertise to make such judgements (i.e. A person competent to assess the unit of competency being observed).

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To be valid, an observation/ third party reports must address the applicant's performance specifically in relation to relevant unit/s of competency. Observations/third party reports should establish the writer's working relationship with the applicant, provide examples of what the third party has observed, be signed, dated and presented in an identifiable document.

### **3. Written testimonial or report that may specifically demonstrate the applicant's knowledge**

This requires the submission of written evidence by the applicant that may specifically demonstrate the applicant's knowledge. Such written reports usually cover and confirm how work and life experience have contributed to such competency being attained. They may also be research or academic papers that confirm the applicant's knowledge on the subject matter.

### **4. Portfolio of evidence**

This requires the submission of workplace documents or other documentary evidence that supports the applicants completion of the outcomes stated in the respective unit of competency

### **5. Resumes/CVs and current job descriptions**

These documents are useful in describing the recent and current contexts in which an applicant works but, on their own, cannot be deemed to be evidence. They must be supported by work examples, valid third party reports and other forms of evidence.

### **6. Copies of policies and procedures**

Many applicants submit such documents as evidence that they work in accordance with an organisations policy and procedures. If this is what the applicant is claiming, they must present evidence of actual work that illustrates this. Of course, if the applicant is claiming to have written the policy and procedures, then the documents themselves are indeed evidence, provided the applicant also presents proof of authorship and provided development of policies and procedures is a requirement of the unit/s of competency being addressed.

### **7. Work documents**

Documents such as examples of the applicant's work, reports, correspondence, meeting documents, files, conference records etc must be identifiable. Each individual piece of evidence should be able to stand on its own. That is, assessors should be able to see that any single piece of evidence is: directly related to the applicant and the organisation for which the work was performed; be dated; have file identification and, where necessary, be signed and/or verified.

### **8. Historical evidence**

The currency of evidence can be a big issue. A general rule of thumb is that evidence that is older than three years must be supported by more up to date evidence of the

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applicant's continued application of the relevant competence. If the applicant can demonstrate a continuum, then the historical evidence can be used; if not, then the applicant must demonstrate current competence in an appropriate way.

## QUALITY EVIDENCE TO BE COLLECTED

Quality evidence is evidence that the assessor can rely upon. The evidence provided must be able to withstand scrutiny and provide a clear picture your competent performance over a period of time

For all units of competency the collection of quality evidence requires that assessment must address the scope of the respective unit and reflect all components of the unit i.e. the elements, performance criteria, range statement, evidence requirements and key competencies:

A range of appropriate assessment methods/evidence gathering techniques is used to determine competency

Evidence must be gathered in the workplace whenever possible. Where no workplace is available, a simulated workplace must be provided

The evidence collected must relate to a number of performances assessed at different points in time and in a learning and assessment pathway these must be separated by further learning and practice

Assessment meets the rules of evidence

A judgement of competency should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated

## GATHERING EVIDENCE

There are three broad types of evidence that you can collect

- Direct evidence
- Indirect evidence
- Personal statements

### Direct Evidence

This is work **produced** by you, which might include:

- Correspondence you have written (letters, faxes, emails)
- Completed in-house work programs e.g. documented delivery of in-house training courses
- Folders or records you have maintained
- Plans or schedules you have created and maintained

Direct evidence is anything that you have produced yourself for which you have been primarily responsible. You will need to consider providing various examples of evidence that you have produced over a period of time. It is important to verify your work as your own by getting your supervisor to authorise the evidence that you have submitted. Remember that the Trainer may contact your supervisor to check verification.

### Indirect evidence

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This is information **about** you, which might include:

- Certificates/Statements of results you have completed
- Minutes of meetings that contain information that you have participated or performed duties at your place of work
- Your position description
- Performance appraisals
- Letters of appreciation from clients or work colleagues
- Reference from previous employees
- Workplace awards, prizes, certificates
- Photographs/recordings of activities you have undertaken
- Reports from managers or supervisors who have witnessed specific activities you have undertaken

### **Personal Statements**

Statements from your managers, supervisors, previous employers, customers & colleagues, can be included in your evidence portfolio to support your claims. These are not references from previous employers but statements of information that are relevant to an element and performance criteria for the unit of competency.

Keep in mind that any personal statements that you include as evidence should include the following:

- A brief description of the situations and/or circumstances in which you carried out the activity/work
- Details of the activity/work
- Explanation of the planning and factors that contributed to the outcomes of the activities/work, e.g. how, why, when and the outcome.

## **GUIDE TO THE SUBMISSION OF EVIDENCE**

### **How to lodge evidence**

Presentation of any written evidence is important. Remember, you are trying to convince your assessor of your competency. Your written assessment or recognition portfolio should:

- be typed or hand written (Please ensure it can be read easily and is in plain English)
- be sorted into correct order and sequence relating to the units of competency applied for
- be grouped into the relevant order and be easy to access (preferably not in plastic sleeves and be clipped together or stapled where required (prevents loss of pages from important bundles).
- give clear references (if external information sources are used)

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All RPL applications should be mailed in hard copy or provided in electronic form (email or digital storage device) wherever possible. Copies must be kept by the applicant.

All applicants should provide contact details for confirmation of receipt of application from the Australian Salesmasters Training Company.

### Sorting and presenting evidence

Evidence provided should:

- Be relevant to the unit of competency.
- Be unambiguously associated with the applicant, not some other person.
  - Each piece of evidence is clearly identifiable as the candidate's own work
  - Qualifications, references, licences etc presented by the candidate are signed off as a full and correct copy of the original by a credible third party
  - Candidate's verbal or written accounts of what they can do are supported by actual evidence, such as work examples, products, etc.
- Be current.
  - demonstrates that the applicant can apply the competency in their current work
  - reflects work carried out by the candidate over a period of time.
  - The key point here is that the assessor must be confident the applicant can still perform to the standard demonstrated by the evidence.
- Be valid:
  - relates directly to the unit of competency
  - demonstrates the relevant underpinning skills and knowledge
  - reflects the four dimensions of competency and key competencies
  - is appropriate to the relevant AQF descriptor. (Detailed below).
- Be verifiable.
- Be reliable.
- Be sufficient:
  - includes all the critical aspects of evidence presented in the unit Evidence Guide, including the specific evidence requirements listed
  - covers the full range of performance identified in the unit
  - shows competency over a period of time and in different contexts
  - includes different forms of evidence
- Focus only on the set performance criteria and associated elements of the unit of competency.
- Copied and placed with each relevant unit of competency or clearly labeled to show where one piece of evidence applies to more than one unit of competency.

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- Cover the competency standard in a clear, logical, and structured manner.

Be sure to indicate copyright and any security or privacy issues when presenting evidence. Australian Salesmasters training Company is sensitive of how RPL information is handled and all materials will usually be returned to the applicant. Any special requirements must be noted in your cover page to prevent legal infringements by all parties.

- Relevant AQTF Descriptor

This is a training program that leads to the completion of the Australian Government's Business Services Training Package. It will equip participants with the essential knowledge, skills and attributes required to work effectively as members of a Business Administration team and a qualification providing participants with practical skills in the area of Business Administration at AQTF Level IV.

### What is the Australian Qualifications Framework?

The Australian Qualifications Framework (AQF) provides a national framework for all education and training qualifications in Australia. There are twelve qualifications in the AQF. Six of these are relevant to the Vocational Education and Training (VET) sector. The twelve qualifications are:

Schools Sector	Vocational Education and Training Sector	Higher Education Sector (Tertiary)
Senior Secondary Certificate of Education	Vocational Graduate Diploma Vocational Graduate Certificate  Advanced Diploma Diploma Certificate IV Certificate III Certificate II Certificate I	Doctoral Degree Masters Degree Graduate Diploma Graduate Certificate Bachelor Degree Advanced Diploma Diploma

### Australian Quality Training Framework Level – Level IV

#### *Characteristics of Learning Outcomes*

- **Breadth, depth and complexity of knowledge and competencies** would cover a broad range of varied activities or application in a wider variety of contexts most of which are complex and non-routine.
- **Leadership and guidance** are involved when organising activities of self and others as well as contributing to technical solutions of a non-routine or contingency nature.
- **Performance of a broad range of skilled applications** including the requirement to evaluate and analyse current practices, develop new criteria and procedures for performing current practices and provision of some leadership and guidance to others in the application and planning of the skills.
- **Applications** involve responsibility for, and limited organisation of, others.

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### ***Distinguishing Features of Learning Outcomes***

Do the competencies enable an individual with this qualification to:

- demonstrate understanding of a broad knowledge base incorporating some theoretical concepts
- apply solutions to a defined range of unpredictable problems
- identify and apply skill and knowledge areas to a wide variety of contexts, with depth in some areas
- identify, analyse and evaluate information from a variety of sources
- take responsibility for own outputs in relation to specified quality standards
- take limited responsibility for the quantity and quality of the output of others.

### **BSB40507 Certificate IV in Business Administration**

**Aims and Outcomes:** This is a training program that leads to the completion of the Australian Government's Business Services Training Package for Business Administration. It will equip participants with the essential knowledge, skills and attributes required to work effectively as members of a project team leading to the development of knowledge and skills towards a supervisory role and or coordinating role in project management.

**About This Course:** The Certificate IV in Business Administration has been designed to equip the participants with the essential skills, knowledge and attributes required to work effectively as project team members in any industry. Project team members are required to perform and or contribute to a multitude of tasks ranging from, organizing meetings, project administration , coordinating business resources to team innovation.

**To be awarded the BSB40507 Certificate IV in Business Administration satisfactory evidence of competency must be submitted for all the 10 units below**

<b>Unit No</b>	<b>Unit Title</b>
BSBADM405B	Organise meetings
BSBADM406B	Organise business travel
BSBCMM401A	Make a presentation
BSBINM401A	Implement workplace information system
BSBWRT401A	Write complex documents
BSBADM409A	Coordinate business resources
BSBADM407B	Administer projects
BSBINN301A	Promote innovation in a team environment
BSBFIA401A	Prepare financial reports
BSBOHS407A	Monitor a safe workplace

**INFORMATION REGARDING PERFORMANCE CRITERIA AND ESSENTIAL EVIDENCE WITH REGARD TO THE ABOVE UITS IS LOCATED AT TRAINING.GOV.AU**

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## PREPARING AN OBSERVATION REPORT

The following is provided as a guide on how you may prepare an observation report.

### Purpose of the task:

- Through this observation candidates must be able to provide evidence that they can successfully complete the unit of competency.

The evidence guide and in some cases the performance criteria relating to the elements of the unit of competency should become the criteria used to align observed performance. The observer or assessor, where they hold competency standards relevant to being an assessor and the unit of competency being assessed, should indicate where the candidate has been observed completing the criteria to both the required standard (satisfactory) and on a consistent basis.

### Instructions for the observation component:

The observer may make comments and add feedback to the candidate during and after the session. These comments are also important parts of the evidence gathering requirements.

While the criteria form the 'checklist' for the observer they also have scope to add comments and add further criteria they may feel is relevant.

The observer/assessor and the candidate being assessed should sign off and date the observation report for it to be considered valid.

*NOTE: The candidate may wish to provide the contact details for the observer/assessor in case the Australian Salesmasters Training Company assessor wishes to confirm either detail relating to the assessment or the observer's relationship with the candidate.*

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OBSERVATION ASSESSMENT for			
Candidate name:			
Unit of competency:			
Observers name (if unqualified):			
Assessors name (if qualified):			
Workplace:			
Date of assessment:			
Length of training session:			
<b>Observation</b>			
Using the Unit of Competency evidence and/or performance criteria list and confirm if the candidate has consistently, and to a satisfactory standard demonstration skills and knowledge relating to:	Yes	No	N/A
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Feedback to candidate:</b>			
<p>The candidate's overall performance was:</p> <p>Satisfactory <input type="checkbox"/> Not Satisfactory <input type="checkbox"/></p>			
<b>Signature of Assessor/Observer:</b>			
	Dated:        /        /201		
<b>Signature of candidate/Assessee:</b>			
	Dated:        /        /201		

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## PREPARING A PORTFOLIO

As you work through the relevant unit of competency you must collect documentation or work samples that 'prove' what you do or have done. Examples of the type of evidence you collect and package into a portfolio can also include:

- Resume, Curriculum Vitae
- Job/Position description
- Certificates/Qualifications/Statements of Attainment
- Memo's (you have drafted)
- Letters (you have drafted)
- Proformas/forms you use e.g.
  - Fax messages
  - Procedures/Policy
- Organisational Chart (with names)
- Reports
- Rosters
- Email Correspondence
- References from supervisor/peers
- Letters of support/appreciation
- Plans you have created
- Performance appraisals/review
- Training Diary
- References from previous employers
- Workplace awards, prizes, certificates
- Tools such as:
  - Budgets/costing sheets etc
  - Department documents
  - Booking sheets
  - Workplace evidence e.g. Team meeting notes
- Evaluation forms
- Meetings/conferences/seminars you have helped organise
- Brochures/Flyers you have produced
- Promotional material
- Feedback sheets/surveys
- Team projects (outlining your roles)

The list is indicative rather than exhaustive.

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You should consider using a Portfolio Cover sheet for each unit of competency to ease its collection and verification by the RPL assessor.

<b>Name:</b>	<b>Date submitted:</b>
I declare this evidence to have been produced by the undersigned. Candidate's signature:	
<b>Portfolio evidence presented for unit of competency:</b>	
List evidence in order:	
<b>Assessor to complete</b> Evidence is:    Valid        Sufficient        Authentic        Current  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>  Assessor signature:  Dated: _____/_____/201__	

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## Providing third part verification in a portfolio

This is a template that can be used by the RPL candidate to secure third party testimony as to their performance of skills and knowledge in relation to a unit of competency.

<b>Name:</b>		<b>Date submitted:</b>	
I declare this evidence to have been produced by the undersigned. Candidate's signature:			
<b>Third party testimony for unit of competency:</b> {List unit of competency title}			
<b>Testimony</b>			
Please confirm the work performance of the applicant using this checklist. This information is confidential and will be used by Registered Training Organisation to assess and recognise any prior learning the candidate may have that satisfy the unit of competency listed above		<b>Yes</b>	<b>Needs more experience</b>
<b>Is the applicant able to reliably meet the organisation's performance standards for the following tasks?</b>			<b>N/A</b>
{List tasks of elements or skills and knowledge from unit of competency}		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
<b>Comments or notes by third party:</b>			
<b>The candidate's overall performance was:</b> Satisfactory <input type="checkbox"/> Not Satisfactory <input type="checkbox"/>			
<b>Signature of Third Party provide of testimony:</b>		Dated: ____ / ____ /201__	
<b>Position:</b>		<b>Contact phone number or email:</b>	
<b>Signature of candidate:</b>		Dated: ____ / ____ /201__	
<b>Position:</b>		<b>Contact phone number or email:</b>	
<b>RPL assessor to complete</b>			
Evidence is: Valid <input type="checkbox"/> Sufficient <input type="checkbox"/> Authentic <input type="checkbox"/> Current <input type="checkbox"/>			
RPL Assessor signature:			
Dated: ____ / ____ /201__			

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# The RPL Application

## RECOGNITION OF PRIOR LEARNING COVER SHEET

**Program: Code: BSB40507 Title: Certificate IV in Business Administration**

Name:

Employer:

Postal Address:

Date of Posting:

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Email contact (*for ASTC to confirm receipt of this application*)

Note any special copyright, privacy or other evidence handling requirements:

Declaration

I declare that:

- No part of this assessment has been copied from another person's work, except where documents or work is listed/referenced
- No part of this assessment has been written for me by another person

Signed:

Date:

**Please post assessment to:**

*Australian Salesmasters Training Company*

*PO Box 638*

*Rosebery*

*NSW 1445*

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## CREENTIALS PRESENTED AS EVIDENCE

Name the credentials (qualifications or statements of attainment) claimed as providing primary evidence for Recognition of Prior Learning against the units of competency composing the Business Services Training Package.

A certified copy of all credential(s) - qualification or statements of attainment- listed **must** be provided.

### Nominate relevant courses and qualifications held

Name of Course	Name and provider code of RTO awarding qualification	Date Awarded

### Nominate relevant statements of attainment for imported units of competence held.

Name of Unit/Module	Training Package or Course Title	Date Awarded

## APPLICANT EMPLOYMENT HISTORY FORM

The following is provided as a guide on how you may prepare a work history report

Name, Address and Phone number of Employers	Period of Employment (DD/MM/YYYY)		Position Held	Full Time Part-time Casual	Description of Major Duties
	From	To			
1.					
2.					
3.					
4.					

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## THE FOLLOWING ARE EXAMPLES OF COMPLETED:

### 1. LEARNING ENVIRONMENT COMPETENCY STANDARD

<b>BSBADM405B</b>	<b>Organise meetings</b>		
<b>Unit Descriptor</b>	This unit describes the performance outcomes, skills and knowledge required to organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement..		
<b>Application of the Unit</b>	This unit applies to individuals employed in a range of work environments who organise a variety of meetings. They may provide administrative support within an enterprise, or have responsibility for these tasks in the context of a particular team, workgroup or project.		
<b>Element</b>	<b>Performance Criteria</b>		<b>Tick if evidence provided (✓)</b>
<b>1. Make meeting arrangements</b>	1.1	Identify type of meeting and its purpose	
	1.2	Identify and comply with any legal or ethical requirements	
	1.3	Identify requirements of meeting and participants	
	1.4	Make meeting arrangements in accordance with requirements of meeting	
	1.5	Advise participants of meeting details	
<b>2. Prepare documentation for meetings</b>	2.1	Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements	
	2.2	Check documentation for accuracy and correct any errors	
	2.3	Distribute documentation to participants within designated time lines	
	2.4	Prepare spare sets of documents	
<b>3. Record and produce minutes of meeting</b>	3.1	Take notes with the required speed and accuracy to ensure an accurate record of the meeting	
	3.2	Produce minutes that reflect a true and accurate account of the meeting	
	3.3	Check minutes for accuracy and submit for approval by the nominated person	
	3.4	Despatch copies of minutes within designated time lines	
<b>Qualifications Gained</b> (Tick the appropriate box) <input type="radio"/> RTO credential <input type="radio"/> Tertiary institution credential (university) <input type="radio"/> Company training course <input type="radio"/> Previous employer training course <input type="radio"/> Accredited Tertiary/Secondary course <input type="radio"/> Other training course (please specify)		<b>Portfolio Evidence Attached</b> (Tick the appropriate box) <input type="radio"/> Sample of work completed <input type="radio"/> References and Testimonials <input type="radio"/> Letter of Validation <input type="radio"/> Certificate <input type="radio"/> Statement of results <input type="radio"/> Awards	

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	<input type="radio"/> Other (specify)
<b>Observation provided by:</b> (Tick the appropriate box) <ul style="list-style-type: none"> <li><input type="radio"/> Person holding unit of competency</li> <li><input type="radio"/> Supervisor familiar with work</li> <li><input type="radio"/> Independent expert</li> </ul>	<b>Written testimonial provided covering:</b> (Tick the appropriate box) <ul style="list-style-type: none"> <li><input type="radio"/> Knowledge (written report or paper)</li> <li><input type="radio"/> Work experience</li> <li><input type="radio"/> Life experience</li> </ul>
<b>Signed:</b>	<b>Date completed:</b>
<b>Name in Full:</b>	<b>Contact email:</b>

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## 2. A GUIDE TO THE COLLECTION OF EVIDENCE

A guide to the collection of evidence for: <b>BSBADM405B Organise meetings</b>	
The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of assessment followed by identification of specific aspects of evidence that will need to be addressed in determining competency. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency. Assessment must reflect the endorsed Assessment Guidelines of the Business Services Training Package	
<b>Overview of Assessment</b>	
To demonstrate competency against this unit candidates must be able to provide evidence of the following: <ul style="list-style-type: none"> <li>organising meetings, including informing participants and preparing materials</li> <li>preparing an agenda</li> <li>taking minutes during a meeting and preparing draft minutes after the meeting.</li> </ul>	
Candidates must show that they have participated in relevant industry/professional development events or activities and had access to appropriate documentation and resources normally used in the workplace and demonstrate communication skills to coordinate and consult with participants, to orally present written reports with a number of defined sections, and to clarify points made in meetings. They must also demonstrate literacy skills to be able to write and compile agenda items, record minutes, make notes from spoken texts in meetings, use a variety of strategies for planning, reviewing and proofreading documentation and demonstrate time management skills to allow sufficient time to prepare for and conduct meetings.	
<b>Checklist for provision of evidence for this Unit of Competency</b>	
	<b>Mark off when satisfied</b>
<b>Legal and ethical requirements that may be used as evidence include:</b>	<ul style="list-style-type: none"> <li>codes of practice</li> <li>legislation relating to companies or associations</li> <li>requirements for public meetings</li> </ul>
<b>Agenda may that may be used as evidence include:</b>	<ul style="list-style-type: none"> <li>correspondence</li> <li>date of next meeting</li> <li>date, time and location of meeting</li> <li>general business</li> <li>major agenda items</li> <li>matters or business arising from the minutes</li> <li>minutes of the previous meeting</li> <li>reports</li> <li>statement of the meeting's purpose</li> <li>welcome</li> </ul>

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<p><b>Papers that may be used as evidence include:</b></p>	<ul style="list-style-type: none"> <li>• chairperson's report</li> <li>• committee reports</li> <li>• correspondence</li> <li>• draft documentation</li> <li>• financial reports</li> <li>• itemised meeting papers</li> <li>• minutes of previous meeting</li> <li>• research reports</li> </ul>
<p><b>Notes that may be used as evidence include:</b></p>	<ul style="list-style-type: none"> <li>• action items</li> <li>• arrangements for next meeting</li> <li>• decisions taken at the meeting</li> <li>• formal motions</li> <li>• future action</li> <li>• issues raised at the meeting</li> <li>• points discussed at the meeting</li> <li>• record of participants who were present at or absent from the meeting (attendees and apologies)</li> <li>• suggestions made at the meeting</li> </ul>
<p><b>Minutes that may be used as evidence include:</b></p>	<ul style="list-style-type: none"> <li>• meeting details (e.g. title, date, time, location)</li> <li>• agenda items</li> <li>• apologies</li> <li>• names of absent and attending participants</li> <li>• approval of the record of the previous minutes</li> <li>• correspondence</li> <li>• lists rather than complete sentences</li> <li>• matters arising from the previous meetings</li> <li>• other business</li> <li>• reports</li> <li>• date of the next meeting</li> <li>• using organisation templates</li> <li>• using previous minutes to determine required format</li> </ul>
<p><b>Context of and specific resources for assessment</b></p>	<p>Assessment must ensure access to an actual workplace or simulated environment and access to office equipment and resources</p>
<p><b>Method of assessment</b></p>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate</li> <li>• review of authenticated documents from the workplace or training environment</li> <li>• demonstration of techniques</li> </ul>

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### 3. OBSERVATION

OBSERVATION ASSESSMENT for BSB40507 Certificate IV in Business Administration			
<b>Candidate name:</b>			
<b>Unit of competency:</b>	BSBADM405B Organise meetings		
<b>Observers name (if unqualified):</b>			
<b>Assessors name (if qualified):</b>			
<b>Workplace:</b>			
<b>Date of assessment:</b>			
<b>Length of observation:</b>			
<b>Observation</b>			
<b>Confirm if the candidate has consistently, and to a satisfactory standard demonstration skills and knowledge relating to:</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
Identify type of meeting and its purpose	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify and comply with any legal or ethical requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify requirements of meeting and participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make meeting arrangements in accordance with requirements of meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise participants of meeting details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check documentation for accuracy and correct any errors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribute documentation to participants within designated time lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare spare sets of documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take notes with the required speed and accuracy to ensure an accurate record of the meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Produce minutes that reflect a true and accurate account of the meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check minutes for accuracy and submit for approval by the nominated person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Despatch copies of minutes within designated time lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Feedback to candidate:</b>			
<b>The candidate's overall performance was:</b> Satisfactory <input type="checkbox"/> Not Satisfactory <input type="checkbox"/>			
<b>Signature of Assessor/Observer:</b>	Dated: / /201		
<b>Signature of candidate/assessee:</b>	Dated: / /201		

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## 4. PORTFOLIO OF EVIDENCE

<b>Name:</b>	<b>Date submitted:</b>
I declare this evidence to have been produced by the undersigned. Candidate's signature:	
<b>Portfolio evidence presented for unit of competency:</b>	
<b>BSBADM405B Organise meetings</b>	
A list of the type of evidence you <b>MUST</b> collect are listed below. There may be other pieces of evidence that you could collect. You are encouraged to discuss any other options with your assessor.	
<ul style="list-style-type: none"> <li>▪ Documented examples evidencing organising meetings, including informing meeting participants and preparing materials</li> <li>• Examples of preparing an agenda</li> <li>• Proof and documented example of taking minutes during a meeting and preparing draft minutes after the meeting</li> <li>• Knowledge of the key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:             <ul style="list-style-type: none"> <li>○ anti-discrimination legislation</li> <li>○ ethical principles codes of practice</li> <li>○ privacy laws</li> <li>○ occupational health and safety</li> </ul> </li> <li>• Examples of time management skills to allow sufficient time to prepare for and conduct meetings.</li> </ul>	
<b>Other evidence provided/substituted (List each item):</b>	
<p><b>Assessor to complete</b></p> <p>Evidence is:    Valid        Sufficient        Authentic        Current</p> <p style="text-align: center;"> <input type="checkbox"/>            <input type="checkbox"/>            <input type="checkbox"/>            <input type="checkbox"/> </p> <p>Assessor signature:</p> <p>Dated: _____/_____/201</p>	

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## Sample of RPL evidence gathering process for BSBADM405B Organise meetings

To assist confusion in the gathering of evidence, please remember that the submission of a couple of good examples, related to specific performance criteria, will answer commonly asked questions and clarify what is required.

### Step 1:

Read the WHOLE unit of competency, making sure you include *the Range Statement and Evidence Guide*.

### Step 2:

Think about what you have done in relation to:

- organising meetings including making arrangements, liaising with participants,
- developing and distributing meeting related documentation.

You must be able to demonstrate:

- communication skills to coordinate and consult with participants, to orally present written reports with a number of defined sections, and to clarify points made in meetings
- literacy skills to:
  - write and compile agenda items
  - record minutes
  - make notes from spoken texts in meetings
  - use a variety of strategies for planning, reviewing and proofreading documentation
- time management skills to allow sufficient time to prepare for and conduct meetings

In particular, think of **at least two** examples of

- organising meetings, including informing participants and preparing materials
- preparing an agenda
- taking minutes during a meeting and preparing draft minutes after the meeting.

[refer: “**Critical aspects for assessment and evidence required to demonstrate competency in this unit**” in the unit Evidence Guide]

and

- examples of access to an actual workplace or simulated environment
- examples access to office equipment and resources

[refer: “**Context of and specific resources for assessment**” in the unit Evidence Guide]

in the past 2-3 years

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For each example, with the help of the Range Statement, work out how you could demonstrate to an assessor:

- The *types of meetings* in which you have been involved
- *Requirements of meeting* you have experienced or satisfied
- What *arrangements* you/been involved with or organised
- Examples of *agendas* you may have developed or dealt with regarding a particular team, workgroup or project meeting (please note privacy issues)
- Have you recorded any *notes* in relation to a team, workgroup or project meeting- if yes, can you supply examples (please note privacy issues)
- Have you recorded any *minutes* in relation to a meeting- if yes, can you supply examples (please note privacy issues)
- Have you experienced any *legal and ethical requirements* in relation to a workplace meeting, for example a workplace specific codes of practice and/or legislation relating to companies or associations (Eg Companies Code)
- Examples of *papers* you have sourced or presented in a meeting
- Can you supply examples of making meeting arrangements?

In an RPL situation, you need to provide documented evidence of all of the above. Such evidence would be **valid**, since it would be based on the elements and performance criteria and on the requirements of the Evidence Guide.

### Examples of documented evidence

These may include written and compiled agenda items, recorded minutes, or notes from spoken texts in meetings. Valid well documented evidence may include:

Agenda	Notes	Minutes
<ul style="list-style-type: none"> <li>• correspondence</li> <li>• date of next meeting</li> <li>• date, time and location of meeting</li> <li>• general business</li> <li>• major agenda items</li> <li>• matters or business arising from the minutes</li> <li>• minutes of the previous meeting</li> <li>• reports</li> <li>• statement of the meeting's purpose</li> <li>• welcome</li> </ul>	<ul style="list-style-type: none"> <li>• action items</li> <li>• arrangements for next meeting</li> <li>• decisions taken at the meeting</li> <li>• formal motions</li> <li>• future action</li> <li>• issues raised at the meeting</li> <li>• points discussed at the meeting</li> <li>• record of participants who were present at or absent from the meeting (attendees and apologies)</li> <li>• suggestions made at the meeting</li> </ul>	<ul style="list-style-type: none"> <li>• meeting details (e.g. title, date, time, location)</li> <li>• agenda items</li> <li>• apologies</li> <li>• names of absent and attending participants</li> <li>• approval of the record of the previous minutes</li> <li>• correspondence</li> <li>• lists rather than complete sentences</li> <li>• matters arising from the previous meetings</li> <li>• other business</li> <li>• reports</li> <li>• date of the next meeting</li> <li>• using organisation templates</li> <li>• using previous minutes to determine required format</li> </ul>

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Documented evidence should clearly establish the relationship between you and your organization/workplace.

The documented evidence must include:

- Official identification, such as the organisation’s/employer’s letterhead, file name/numbers, and a clear statement about you and your role [to establish **authenticity**]
- Dates and timeframes [to establish **currency**]
- Description of the meeting arrangements, how you identified needs etc [**validity – Element 1**]
- Description of how you have prepared documentation for meetings [**validity – Elements 2**]

### ***2 A final report form***

Some form of documented evidence to provide evidence that the above was recorded and produced [**validity – Element 3**]

Note that all of the above may appear in one authenticated, dated document.

### ***3 Evidence to support your***

- ***communication skills to coordinate and consult with participants, to orally present written reports with a number of defined sections, and to clarify points made in meetings***
- ***literacy skills to:***
  - ***write and compile agenda items***
  - ***record minutes***
  - ***make notes from spoken texts in meetings***
  - ***use a variety of strategies for planning, reviewing and proofreading documentation***
- ***time management skills to allow sufficient time to prepare for and conduct***

Such evidence may be in the form of emails between you and your workplace supervisor and/or meeting members, written feedback from your workplace supervisor and/or from others involved with the meeting re the taking of **notes** with the required speed and accuracy to ensure an accurate record of the meeting and production of **minutes** that reflect a true and accurate account of the meeting and have been approved and dispatched within the required timelines[**validity – Element 3**]

NB: Written feedback from meeting members is appropriate evidence in relation to communication skills in this context

- ***knowledge of***
  - ***culturally appropriate communication techniques***
  - ***formats for agendas and minutes***
  - ***key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:***
  - ***anti-discrimination legislation***

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- *ethical principles*
- *codes of practice*
- *privacy laws*
- *occupational health and safety*

Such evidence may also be in the form of culturally appropriate communication techniques such as emails between you and your workplace supervisor and/or meeting members, written feedback from your workplace supervisor and/or from others involved with the meeting re the production of an agenda and minutes that are legislation compliant and in the appropriate form in accordance with workplace policy and procedure and/or legislative requirement[**validity – Elements 2 & 3**]

#### **4 Third party report**

Your facilitation of all aspects of the meeting establishes you have organised meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation as described above should be verified by a credible third party, usually a manager or senior colleague. Again, such a report must be identified, as above, dated and signed. If in the form of an email, the report would be self-identifying and dated.

#### **In conclusion**

To ensure that your evidence is **sufficient**, you should include at least three different forms of evidence, as described above, of involvement in organising meeting functions. Together, the meeting documents, emails and third party report should demonstrate your competency.

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Working Futures™ for layout, design, methods and tools

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