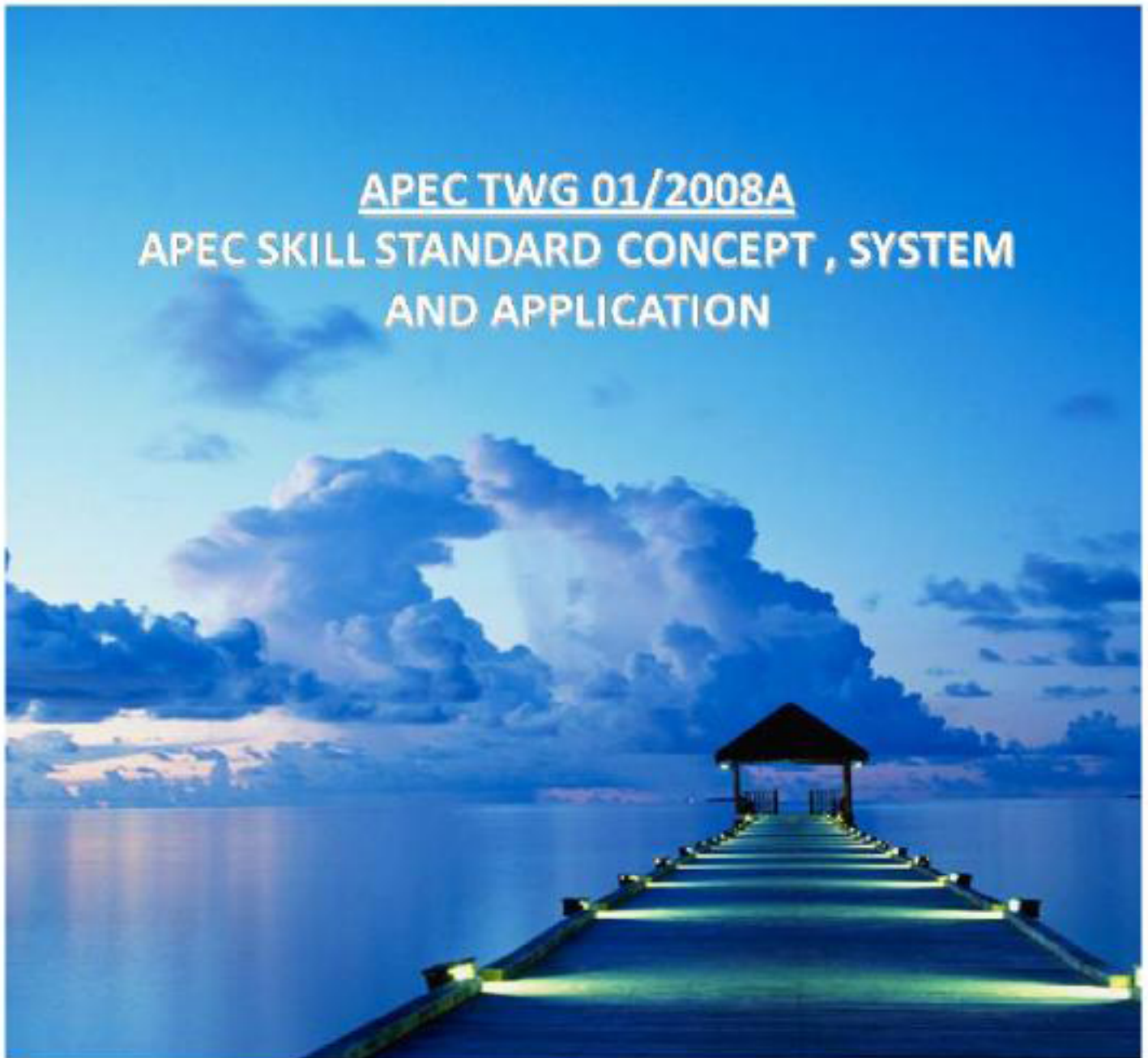![APEC logo] Asia-Pacific Economic Cooperation

APEC TWG 01/2008A
APEC SKILL STANDARD CONCEPT , SYSTEM AND APPLICATION

APEC Tourism Working Group
December 2008

TWG 01/2008A – **The Training on APEC Skill Standard Concept and System**

<u>PART TWO</u>
COMPLETE LIST OF
APEC SKILL STANDARD UNITS

COMPLETE LIST OF
APEC SKILL STANDARD UNITS
2005

LIST OF APEC SKILL STANDARD CHAPTERS AND UNITS

CHAP-TERS	CHAPTER DESCRIPTION / HEADINGS	TOTAL UNITS	TOTAL ELMTS	TOTAL PC
CHAPTER 1 – GENERAL		**79**	**302**	**1,216**
1.02	General Core	13	34	107
1.02	General Administration and Management	37	164	530
1.03	Computer and Management Information System	10	32	123
1.04	English Language	9	43	336
1.05	Environment & Community Integration	10	29	120
CHAPTER 2 – GENERAL VOCATIONAL		**87**	**349**	**1,496**
2.01	Customer Service, Sales and Marketing	16	62	250
2.02	Financial Administration and Management	11	36	169
2.03	Human Resources Management	9	28	119
2.04	Security	19	93	337
2.05	Gardening and Landscaping	7	23	95
2.06	Maintenance and Engineering	9	46	167
2.07	SS Training, Assessment and Application	16	83	341
CHAPTER 3 – HOSPITALITY MANAGEMENT & ADMINISTRATION		**110**	**379**	**1,344**
3.01	Tourism Core	2	4	16
3.02	Food and Beverage Operation	17	61	278
3.03	Front Office Operation	10	28	120
3.04	Housekeeping Operation	6	23	99
3.05	Cookery (Food Production)	34	111	341
3.06	Catering Operation	12	41	117
3.07	Patisserie	13	47	126

3.08	Mice, Functions, Sport and Recreation	10	35	146
3.09	Gaming Operation	6	29	101
CHAPTER 4 - TRAVEL BUSINESS MANAGEMENT & ADMINISTRATION		**77**	**262**	**1,105**
4.01	Tourism Core	2	4	16
4.02	Retail and Wholesale Travel	13	42	124
4.03	Tour Operations	9	31	104
4.04	Meetings, Incentives, Conferences and Exhibition	9	28	144
4.05	Tour Guiding	11	35	167
4.06	Attractions and Visitor Information Center	21	86	382
4.07	Planning and Product Development	12	36	168
CHAPTER 1-4		**353**	**1,292**	**5,143**

CHAPTER I.01 - GENERAL CORE UNITS (13 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
1.01.01.05	Work with colleagues and customers	4	6+7+2+8 = 23
1.01.02.05	Work in a socially diverse environment	2	4+5 = 9
1.01.03.05	Follow health, safety and security procedures	3	3+4+2+2 = 11
1.01.04.05	Follow workplace hygiene procedures	2	2=2 = 4
1.01.05.05	Tidy and maintain workplace station	2	7+7 = 14
1.01.06.05	Handle one point information system	4	6+4+2+ 5 = 17
1.01.07.05	Provide company products information	2	4+4 = 8
1.01.08.05	Communicate on the telephone	2	9+5 = 14
1.01.09.05	Perform clerical procedures	3	3+4+2 = 9
1.01.10.05	Follow operational and/or organizational changes	2	3+4 = 7
1.01.11.05	Provide basic country information	2	4+3 = 7
1.01.12.05	Provide information on APEC Skill Standard	2	1+2 = 3
1.01.13.05	Provide first aid	4	3+2+2=2 = 9
	Total 13 units	**34**	**107**

CHAPTER I.02 - GENERAL ADMINISTRATION & MANAGEMENT (37 UNITS)

Unit code	Unit Name	ELM	Total PC
1.02.01.05	Develop and implement organizations policies and procedures	3	9+5+4 = 18
1.02.02.05	Coordinate office activities	4	4+5+5+5 = 19
1.02.03.05	Source and present information	2	3+5 = 8
1.02.04.05	Prepare business documents	4	2+3+8+5 = 18
1.02.05.05	Plan and prepare meetings	2	2+3 = 5
1.02.06.05	Receive and store stock	3	3+4+6 = 13
1.02.07.05	Control and order stocK	5	6+2+4+3+5 = 20
1.02.08.05	Plan and establish systems and procedures* (idem 1.03.08.05)	3	5+3+3 = 11
1.02.09.05	Manage and evaluate projects	3	6+7+4 = 17
1.02.10.05	Plan and establish a small enterprise (SME)	7	6+5+7+3+5+6+3 = 35
1.02.11.05	Minimize and control theft	4	5+4+7+2 = 18
1.02.12.05	Monitor workplace operations (idem 2.03.09.05)	4	5+6+2+5 = 18
1.02.13.05	Develop and implement operational plans	3	9+5+4 = 18
1.02.14.05	Develop, monitor and implement business plan	3	3+4+3 = 10
1.02.15.05	Establish and maintain a safe and secure workplace	8	4+3+5+6+3+1+1+3 =

			26
1.02.16.05	Implement workplace health, safety and security procedures	5	3+3+3+3+2 = 14
1.02.17.05	Develop and update legal knowledge required for legal compliance	3	3+5+2 = 10
1.02.18.05	Manage and purchase stock	3	4+5+5 = 14
1.02.19.05	Manage physical assets	3	1+5+5 = 11
1.02.20.05	Develop, implement and monitor local / regional plan	3	10+2+3 = 15
1.02.21.05	Create, implement and evaluate strategic product development initiative (idem 4.07.xx.05)	3	11+3+3 = 17
1.02.22.05	Provide mentoring support to business colleagues (The Buddy System) (idem 2.03.22.05)	2	3+6 = 9
1.02.23.05	Represent enterprise in events	5	6+4+9+11+4 = 34
1.02.24.05	Apply quality standards and procedures	4	3+3+4+2 = 12
1.02.25.05	Update and incorporate external factors/ issues	4	2+4+7+5 = 18
1.02.26.05	Prepare a feasibility study	4	3+3+7+6 = 19
1.02.27.05	Develop, implement and maintain national / local / corporate identity image	4	4+3+9+8 = 24
1.02.28.05	Research data	3	2+4+3 = 9
1.02.29.05	Manage quality customer service	2	4+6 = 10
1.02.30.05	Operate a small business (SME)	7	8+7+6+5+3+2+3 = 34
1.02.31.05	Develop and update information on APEC Skill Standards	2	3+2 = 5
1.02.32.05	Develop and update basic information on APEC and ASEAN	2	3+2 = 5
1.02.33.05	Develop and update enterprise and local / country information	2	3+2 = 5
1.02.34.05	Deal with conflict situation	3	2+4+6 = 12
1.02.35.05	Implement and monitor continuous improvements systems	3	3+3+3 = 9
1.02.36.05	Conduct and meetings	3	3+5+1 = 8
1.02.37.05	Develop and implement special policy and program on trade liberalization	6	3+3+4+3+3+3 = 19
	TOTAL 37 Units	164	530

CHAPTER I.03 - COMPUTER & MANAGEMENT INFORMATION SYSTEM UNITS (10 Units)

Unit code	Unit Name	ELM	Total PC
1.03.01.05	Access and retrieve computer data	3	4+5+3 = 12
1.03.02.05	Produce documents on computer	4	5+6+5+3 = 19
1.03.03.05	Design and develop computer documents, reports and worksheet	3	6+6+4 = 16
1.03.04.05	Operate an automated information system	3	4+2+4 = 10
1.03.05.05	Monitor and maintain computer system	3	4+9+5 = 18
1.03.06.05	Operate a computerized reservation system (idem 3.03.10.05)	3	2+4+2 = 8
1.03.07.05	Maintain a product information inventory	4	2+2+3+3 = 10
1.03.08.05	Plan and establish system and procedures (idem 1.02.08.05)	3	5+3+3 = 11

1.03.09.05	Access and interpret information (idem 4.02.xx.05	3	2+2+4 = 8
1.03.10.05	Source and package information and advice (idem 4.02.xx.05	3	4+3+4 = 11
	TOTAL 10 UNITS	32	123

CHAPTER I.04 - ENGLISH LANGUAGE UNITS (9 Units)

Unit code	Unit Name	ELM	Total PC
1.04.01.05	Speak and understand English at basic operational level	6	8+6+8+10+10+4 = 46
1.04.02.05	Read English at basic operational level	3	5+3+4 = 12
1.04.03.05	Write English at basic operational level	5	8+10+10+6+7 = 41
1.04.04.05	Speak and understand English at supervisory operational level	10	11+6+9+7+7+7+9+8+7+5 = 76
1.04.05.05	Read English at supervisory operational level	3	6+5+6 = 17
1.04.06.05	Write English at supervisory operational level	4	8+15+9+8 = 40
1.04.07.05	Speak and understand English at advance operational level	6	5+10+9+7+8+6 = 45
1.04.08.05	Read English at advance operational level	2	8+8 = 16
1.04.09.05	Write English at advance operational level	4	13+16+7+7 = 43
	TOTAL 09 Units	43	336

CHAPTER I.05 - ENVIRONMENT & COMMUNITY INTEGRATION UNITS (10 UNITS)

Unit code	Unit Name	ELM	Total PC
1.05.01.05	Implement sustainable horticultural practices	5	4+3+3+6+2 = 18
1.05.02.05	Collect refuse and recyclables	2	4+2 = 6
1.05.03.05	Plan, develop and monitor ecologically sustainable operations (idem 4.07.06.05)	3	7+6+2 = 15
1.05.04.05	Plan and implement minimal impact operations (idem 4.04.07.05 / 4.07.XX.05)	3	3+3+3 = 9
1.05.05.05	Research and share general information on local ethnic cultures	2	6+5 = 11
1.05.06.05	Interpret aspects of local ethnic cultures (idem 4.04.xx.05)	2	2+8 = 10
1.05.07.05	Plan and develop culturally appropriate tourism operations (idem 4.07.10.05)	3	7+10+3 = 20
1.05.08.05	Develop host community awareness tourism (idem 4.07.07.05)	2	3+4 = 7
1.05.09.05	Assess tourism opportunities for local communities (idem 4.07.08.05)	5	4+4+3+3+3 = 17
1.05.10.05	Develop interpretive content for ecotourism activities (idem 4.07.11.05)	2	2+5 = 7
TOTAL	**10 UNITS**	29	120

CHAPTER 2.01 - CUSTOMER SERVICE, SALES & MARKETING (16 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.01.01.05	Promote products and services to customers	2	7+4 = 11
2.01.02.05	Conduct presentation	2	5+9 = 14
2.01.03.05	Plan and implement sales activities	4	7+3+8+4 = 22
2.01.04.05	Coordinate marketing and promotional activities	7	4+3+3+5+3+4+4 = 26
2.01.05.05	Establish and conduct business relationships	4	3+5+3+4 = 15
2.01.06.05	Sell products and services	3	2+9+2 = 13
2.01.07.05	Manage quality customer service (idem 1.02.XX.05)	2	4+6 = 10
2.01.08.05	Coordinate the production of brochures and marketing materials	5	1+3+2+5+6 = 17
2.01.09.05	Create a promotional display / stand	4	5+2+3+3 = 13
2.01.10.05	Develop, manage and evaluate marketing strategies	4	1+5+3+3 = 12
2.01.11.05	Research Data (idem 1.02.xx.05)	3	2+4+3 = 9
2.01.12.05	Maintain product inventory (idem 3.03.xx.05)	4	2+2+3+3 = 10
2.01.13.05	Sell merchandise (idem 4.06.xx.05)	7	2+5+4+5+4+3+3 = 26
2.01.14.05	Advice on merchandise (idem 4.06.xx.05)	2	2+3 = 5
2.01.15.05	Merchandise products (idem 4.06.xx.05)	5	7+5+3+7+1 = 23
2.01.16.05	Apply Point of Sales (POS) Transactions (idem 2.02.xx.05 / 4.06.xx.05)	4	9+7+3+5 = 24
	Total 16 units	62	250

CHAPTER 2.02 - FINANCIAL ADMINISTRATION & MANAGEMENT (14 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.02.01.05	Process financial transaction (idem 3.03.03.05)	2	7+8 = 15
2.02.02.05	Maintain financial records (idem 3.03.04.05)	2	6+4 = 10
2.02.03.05	Audit financial procedures (idem 3.03.05.05)	2	6+2 = 8
2.02.04.05	Prepare financial statement	3	1+3+2 = 6
2.02.05.05	Administer refunds settlement (idem 3.03.xx.05 / 4.02.xx.05)	2	5+3 = 8
2.02.06.05	Manage payroll records	3	4+5+5 = 14
2.02.07.05	Manage finances within a budget	4	5+4+6+3 = 18
2.02.08.05	Prepare and monitor budgets	3	4+10+4 = 18
2.02.09.05	Manage financial operations	8	4+6+5+4+6+2+4+3 = 34

2.02.10.05	Manage and purchase stocks	3	4+5+5 = 14
2.02.11.05	Process Point of Sales (POS) transactions (idem 2.01.xx.05 / 4.06.xx.05)	4	9+7+3+5 = 24
	Total 11 units	**36**	**169**

CHAPTER 2.03 - HUMAN RESOURCES MANAGEMENT (09 Units)

SUMMARY OF UNITS

Unit Code	Unit Name	ELM	TOTAL PC
2.03.01.05	Roster staff*	2	6+2 = 8
2.03.02.05	Monitor staff performance	3	6+5+4 = 15
2.03.03.05	Recruit and select staff	4	5+7+4+3 = 19
2.03.04.05	Lead and manage people	3	3+7+5 = 15
2.03.05.05	Manage workplace relations	2	6+3 = 9
2.03.06.05	Provide mentoring support to business colleagues (The Buddy System) (idem 2.03.xx.05)	2	2+6 = 8
2.03.07.05	Analyze SS Requirements (idem 2.07.10.05)	5	3+6+3+3+4 = 19
2.03.08.05	Manage workplace diversity	3	3+2+3 = 8
2.03.09.05	Monitor workplace operations* (idem 1.02.12.05)	4	5+6+2+5 = 18
	Total 09 units	**28**	**119**

CHAPTER 2.04 - SECURITY (19 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.04.01.05	Maintain the security of premises and property	5	5+7+6+1+3 = 22
2.04.02.05	Determine and use reasonable security force to control, access to and exit from premises	9	7+6+5+4+3+4+3+3+2 = 32
2.04.03.05	Maintain the safety of premises and property	6	7+8+8+5+1+4 = 33
2.04.04.05	Manage intoxicated person	6	3+2+3+6+4+1 = 19
2.04.05.05	Operate basic security equipment	4	2+3+2+4 = 11
2.04.06.05	Apprehend offenders	4	5+4+7+5 = 21
2.04.07.05	Screen baggage and people to minimize security risks	4	4+5+2+2 = 13
2.04.08.05	Escort and carry valuables	3	3+3+2 = 8
2.04.09.05	Control crowds	7	3+2+2+3+7+3+2 = 22
2.04.10.05	Employ baton and handcuffs	2	4+2 = 6
2.04.11.05	Interpret information from advance security equipment	3	3+2+3 = 8
2.04.12.05	Operate central monitoring / communicating station	5	3+2+4+3+3 = 15
2.04.13.05	Monitor field staff activity from control room	4	3+3+3+2 = 11

2.04.14.05	Operate security vehicle	3	3+3+3 = 9
2.04.15.05	Manage dogs for patrols	4	4+4+4+3 = 15
2.04.16.05	Provide lost and found facility	4	1+2+1+1 = 5
2.04.17.05	Observe and monitor people	6	3+2+2+2+2+5 = 16
2.04.18.05	Plan and conduct evaluation of premises	4	2+2+4+3 = 11
2.04.19.05	Provide safety for VIPs	10	3+7+5+5+7+5+2+4+6+5 = 49
	Total 19 units	93	337

CHAPTER 2.05 - GARDENING & LANDSCAPING (07 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.05.01.05	Provide turf care	2	5+3 = 8
2.05.02.05	Fell small trees	4	3+3+4+5 = 15
2.05.03.05	Transplant small trees	4	5+3+4+6 = 18
2.05.04.05	Establish planted areas	3	3+4+4 = 11
2.05.05.05	Propagate plants	4	3+2+3+9 = 17
2.05.06.05	Prune shrubs and small trees	3	6+2+5 = 13
2.05.07.05	Implement a landscape maintenance program	3	3+4+6 = 13
	Total 07 units	23	95

CHAPTER 2.06 - MAINTENANCE AND ENGINEERING (09 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.06.01.05	Operate equipment and machineries	3	5+3+6 = 14
2.06.02.05	Operate operational vehicles	3	3+4+1 = 8
2.06.03.05	Carry our vehicle maintenance and minor repairs (idem 4.03.xx.05)	4	2+2+3+1 = 9
2.06.04.05	Carry out specialist maintenance & construction	7	7+4+3+4+5+5+4 = 32
2.06.05.05	Carry out ground maintenance	5	8+6+4+2+3 = 23
2.06.06.05	Carry out general maintenance	5	8+4+3+2+3 = 20
2.06.07.05	Supervise machinery maintenance	3	2+4+3 = 9
2.06.08.05	Supervise maintenance operations.	7	5+3+5+6+4+4+4 = 31
2.06.09.05	Monitor pool water quality	9	4+2+2+5+1+1+1+4+1 = 21
	Total 09 units	46	167

CHAPTER 2.07 - SS TRAINING, ASSESSMENT AND APPLICATION (16 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
2.07.01.05	Train small groups	4	3+ 5+2+5 = 15
2.07.02.05	Plan and promote a training program	4	4+6+4+3 = 17
2.07.03.05	Plan a series of training sessions	5	5+6+6+6+5 = 28
2.07.04.05	Deliver training sessions	5	6+5+11+4+5 = 31
2.07.05.05	Review training	3	2+6+1 = 9
2.07.06.05	Design training courses	7	6+2+4+3+4+2+2 = 23
2.07.07.05	Plan SS assessment	4	5+3+4+4 = 16
2.07.08.05	Conduct SS assessment	8	6+3+3+4+4+2+3+3 = 28
2.07.09.05	Review SS assessment	3	4+3+3 = 10
2.07.10.05	Develop SS based assessment procedures	5	9+12+3+7+4 = 35
2.07.11.05	Develop SS based assessment tools	6	6+4+5+3+4+2 = 24
2.07.12.05	Design and establish SS based training system	7	3+2+2+5+1+3+6 = 22
2.07.13.05	Design and establish SS based assessment system	8	4+4+2+3+5+2+3+6 = 29
2.07.14.05	Manage the SS based training & assessment system	5	4+5+3+3+5 = 20
2.07.15.05	Evaluate the SS based training & assessment system	4	8+2+2+2 = 14
2.07.16.05	Analyze SS requirements (idem 2.03.xx.05)	5	4+6+3+3+4 = 20
	TOTAL 16 UNITS	**83**	**341**

CHAPTER 3.01 - TOURISM CORE (02 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.01.01.05	Provide local / national tourism information (idem 4.01.01.05)	2	4+4 = 8
3.01.02.05	Provide APEC / ASEAN tourism information (idem 4.01.02.05)	2	4+4 = 8
	Total 2 UNITS	**4**	**16**

CHAPTER 3.02 - FOOD AND BEVERAGE OPERATION (17 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.02.01.05	Clean and tidy bar areas	2	5+6 = 11
3.02.02.05	Operate a bar	4	6+3+10+6 = 25
3.02.03.05	Provide a link between kitchen and service areas	2	7+3 = 10
3.02.04.05	Provide Food & Beverage service	4	7+5+5+7 = 24
3.02.05.05	Provide table service of alcoholic beverages	2	2+6 = 8
3.02.06.05	Operate cellar system	4	6+2+5+6 = 19
3.02.07.05	Complete liquor retail sales	4	6+4+5+8 = 23
3.02.08.05	Provide rooms service	5	8+7+5+3+3 = 26
3.02.09.05	Provide responsible service of alcohol	4	2+4+2+4 = 12
3.02.10.05	Prepare and serve non alcoholic beverages	3	5+4+3 = 12
3.02.11.05	Develop and update food and beverage knowledge	2	3+3 = 6
3.02.12.05	Provide specialist advice on food	3	3+6+3 = 12
3.02.13.05	Provide specialist wine service	5	4+3+5+3+3 = 18
3.02.14.05	Prepare and serve cocktails	3	3+4+2 = 9
3.02.15.05	Provide GUERIDON service	3	8+3+3 = 14
3.02.16.05	Provide Silver Service	3	3+2+5 = 10
3.03.17.05	Design a small FB outlet	8	5+4+7+4+5+8+3+3 = 39
	Total 17 units	**61**	**278**

CHAPTER 3.03 - FRONT OFFICE OPERATION (10 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.03.01.05	Receive and process reservations (idem 4.02.xx.05)	4	4+6+2+2 = 14
3.03.02.05	Provide accommodation reception services	4	6+8+8+3 = 25
3.03.03.05	Maintain financial records (idem 2.02.xx.05)	2	6+4 = 10
3.03.04.05	Process financial transactions (idem 2.02.xx.05)	2	7+8 = 15
3.03.05.05	Audit financial transactions (idem 2.02.xx.05)	2	6+2 = 8
3.03.06.05	Provide club reception services	2	5+5 = 10
3.03.07.05	Provide concierge services	3	5+4+3 = 12
3.03.08.05	Operate a computerized reservation system (idem 2.02.xx.05 / 4.02.xx.05)	3	2+4+2 = 8
3.03.09.05	Maintain product information inventory (idem 2.01.xx.05 / 4.02.xx.05)	4	2+2+3+3 = 10
3.03.10.05	Administer refunds settlement (idem 2.02.xx.05 / 4.02.xx.05)	2	5+3 = 8
	Total 10 units	28	120

CHAPTER 3.04 - HOUSEKEEPING & LAUNDRY (06 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Total elements	Total PC
3.04.01.05	Provide housekeeping services to guests	2	8+3 = 11
3.04.02.05	Clean workplace premises and equipment	3	4+6+5 = 15
3.04.03.05	Prepare rooms for guests	7	3+2+3+9+9+4+1 = 31
3.04.04.05	Launder linen	4	3+6+3+2 = 14
3.04.05.05	Provide valet service	3	3+5+7 = 15
3.04.06.05	Prepare plants for display	4	3+3+3+4 = 13
	Total 06 units	23	99

CHAPTER 3.05 - COOKERY (34 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.05.01.05	Organize and prepare food	4	1+2+5+1 = 9
3.05.02.05	Present food	3	2+4+2 = 8

3.05.03.05	Receive and store stock	3	3+4+6 = 13
3.05.04.05	Sanitize and clean premises	3	4+3+2 = 9
3.05.05.05	Use basic methods of cookeries	2	2+4 = 6
3.05.06.05	Prepare appetizers and salads	4	3+4+1+1 = 9
3.05.07.05	Prepare sandwiches	3	4+1=1 = 6
3.05.08.05	Prepare stocks and sauces	3	2+3+1 = 6
3.05.09.05	Prepare soups	3	1+4+1 = 6
3.05.10.05	Prepare vegetables, eggs and farinaceous dishes	4	4+3+4+1 = 12
3.05.11.05	Prepare and cook poultry and game	3	2+4+4 = 10
3.05.12.05	Prepare and cook seafood	4	6+4+1+3 = 14
3.05.13.05	Identify and prepare meat	5	3+2+3+1+3 = 12
3.05.14.05	Prepare hot and cold desserts	5	3+2+2+2+2 = 11
3.05.15.05	Prepare pastry, cakes and yeast goods	3	1+1+2 = 4
3.05.16.05	Plan and prepare foods for buffets	4	3+4+1+1 = 9
3.05.17.05	Implement food safety procedures	3	1+1+6 = 8
3.05.18.05	Prepare diet based and preserved foods	3	3+4+2 = 9
3.05.19.05	Plan and control menu based catering (IDEM 3.06.xx.05)	3	3+4+1 = 8
3.05.20.05	Organize bulk cooking operations	4	4+4+5+3 = 16
3.05.21.05	Organize food service operations	3	4+3+1 = 8
3.05.22.05	Prepare pates and terrines	3	2+3+2 = 8
3.05.23.05	Plan, prepare and display buffet	24	2+4+2+2 = 10
3.05.24.05	Prepare portion controlled meat cuts	4	2+3+2+2 = 9
3.05.25.05	Handle and serve cheese	4	3+2+3+3 = 11
3.05.26.05	Prepare food according to specific dietary and cultural needs	3	6+4+2 = 12
3.05.27.05	Develop menus to meet special cultural and dietary needs	3	2+7+4 = 13
3.05.28.05	Select, prepare and serve specialized food items	5	2+3+2+1+3 = 11
3.05.29.05	Select, prepare and serve specialist cuisine	6	2+2+2+1+1+2 = 10
3.05.30.05	Monitor catering revenues and costs	4	3+3+3+2 = 11
3.05.31.05	Establish and maintain food quality control	3	3+1+1 = 5
3.05.32.05	Develop a food safety plan	4	4+13+5+6 = 28
3.05.33.05	Prepare and produce cooking paste	5	3+2+2+3+3 = 13
3.05.34.05	Design menus to meet market needs	3	2+1+4 = 7
	TOTAL 34 Units	**111**	**341**

CHAPTER 3.06 - CATERING (12 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.06.01.05	Select cook-chill production systems	2	2+3 = 5

3.06.02.05	Package prepared foodstuffs	3	1+1+4 = 6
3.06.03.05	Transport and store food in a safe and hygienic manner	3	1+3+5 = 9
3.06.04.05	Operate a fast food outlet	9	5+5+6+3+2+2+3+2+6 = 34
3.06.05.05	Apply cook-chill production process	6	2+3+2+6+4+1 = 18
3.06.06.05	Apply catering control principles	3	2+6+3 = 11
3.06.07.05	Prepare daily meal plans to promote good health	3	1+5+1 = 7
3.06.08.05	Select catering system	2	3+6 = 9
3.06.09.05	Manage facilities associated with catering contracts	4	3+3+3+1 = 4
3.06.10.05	Plan the total concept for a major event or function	1	3
3.06.11.05	Prepare tenders for catering concept	2	2+1 = 3
3.06.12.05	Plan and control menu based catering (idem 3.05.xx.05)	3	3+4+1 = 8
	Total 12 units	**41**	**117**

CHAPTER 3.07 - PATISSERIE (13 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.07.01.05	Prepare and produce pastries	2	1+2 = 3
3.07.02.05	Prepare and produce cakes	2	1+2 = 3
3.07.03.05	Prepare and produce yeast goods	2	1+2 = 3
3.07.04.05	Prepare bakery products for patissiers	2	4+2 = 6
3.07.05.05	Prepare and present Gateaux, Torten and cakes	4	3+3+4+1 = 11
3.07.06.05	Present desserts	3	4+2+2 = 8
3.07.07.05	Prepare and display petit fours	6	4+4+1+2+1+1 = 13
3.07.08.05	Prepare and model marzipan	4	2+3+1+3 = 9
3.07.09.05	Prepare desserts to meet special dietary requirements	3	3+1+1 = 5
3.07.10.05	Prepare and display sugar works	6	4+1+2+4+5+3 = 19
3.07.11.05	Prepare chocolate and chocolate confectionery	6	3+5+3+4+5+2 = 22
3.07.12.05	Plan, prepare and display sweet buffet show pieces	3	3+5+3 = 11
3.07.13.05	Plan and operate coffee shops	4	4+4+3+2 = 13
	Total 13 units	**47**	**126**

CHAPTER 3.08 - MICE, FUNCTIONS, SPORT & RECREATION (10 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.08.01.05	Organize functions	4	4+4+9+3 = 20
3.08.02.05	Provide arrival and departure assistance (idem 4.05.xx.05)	4	8+2+3+8 = 21

3.08.03.05	Book and coordinate supplier services	4	3+3+2+4 = 12
3.08.04.05	Plan and develop event proposals and bids	3	3+4+2 = 9
3.08.05.05	Develop conference programs	3	2+5+2 = 9
3.08.06.05	Develop, implement and evaluate sponsorship plans	4	4+6+6+2 = 18
3.08.07.05	Develop, implement and monitor event management systems and procedures	3	2+5+3 = 10
3.08.08.05	Coordinate guest / delegate registration at venue	3	3+6+5 = 14
3.08.09.05	Provide on site management services	4	4+6+5+6 = 21
3.08.10.05	Process and monitor event registrations	3	7+2+3 = 12
	Total 10 units	**35**	**146**

CHAPTER 3.09 - GAMING (06 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
3.09.01.05	Operate a gaming location	5	3+5+5+8+3 = 24
3.09.02.05	Operate a Tab outlet	5	7+1+2+2+3 = 15
3.09.03.05	Conduct a Keno game	7	2+2+3+2+2+3+4 = 18
3.09.04.05	Analyze and report on gaming machine data	3	2+3+1 = 6
3.09.05.05	Provide responsible gaming service	3	4+3+5 = 12
3.09.06.05	Operate a games location	6	7+2+8+4+3+2 = 26
	Total 06 units	**29**	**101**

CHAPTER 4.01 - TOURISM CORE (02 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.01.01.05	Provide local / national tourism information (idem 3.01.01.05)	2	4+4 = 8
4.01.02.05	Provide APEC / ASEAN tourism information (idem 3.01.02.05)	2	4+4 = 8
Total	2 UNITS	4	16

CHAPTER 4.02 - RETAIL & WHOLESALE TRAVEL (13 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.02.01.05	Receive and process reservations (idem 3.03.xx.05)	4	4+6+2+2 = 14
4.02.02.05	Operate a computerized reservation system (idem 3.03.xx.05/ 1.03.xx.05)	3	2+4+2 = 8
4.02.03.05	Maintain product information inventory (idem 3.03.xx.05 / 2.01.xx.05)	4	2+2+3+3 = 10
4.02.04.05	Administer billing and settlement plan (BSP) (idem 3.03.xx.05 / 2.02.xx.05)	2	5+3 = 8
4.02.05.05	Source and package tourism products and services (idem 4.07.xx.05)	2	5+8 = 13
4.02.06.05	Source and provide destination information and advice	3	4+3+4 = 11
4.02.07.05	Access and interpret product information	3	2+2+4 = 8
4.02.08.05	Prepare quotations	3	5+4+2 = 11
4.02.09.05	Process non air documentation	2	1+5 = 6
4.02.10.05	Construct and ticket domestic airfares	3	2+4+3 = 9
4.02.11.05	Construct and ticket normal international airfares	3	2+1+2 = 5
4.02.12.05	Construct and ticket promotional international airfares	3	3+3+2 = 8
4.02.13.05	Apply advances airfare rules and procedures	7	2+2+2+1+2+2+2 = 13
	Total 13 units	42	124

CHAPTER 4.03 - TOUR OPERATIONS (09 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Total elements	Total PC
4.03.01.05	Allocate tour resources	3	2+9+2 = 13
4.03.02.05	Conduct pre departure checks	4	1+3+4+1 = 9

4.03.03.05	Drive vehicles	3	5+2+4 = 11
4.03.04.05	Drive coach / buses	3	7+2+4 = 13
4.03.05.05	Operate and maintain a 4 WD vehicle	3	4+3+3 = 10
4.03.06.05	Carry out vehicle maintenance and minor repairs (idem 2.06.xx.05)	4	2+2+3+1 = 8
4.03.07.05	Set up and operate a camp site	4	3+4+4+5 = 16
4.03.08.05	Provide camp site catering	4	3+3+6+2 = 14
4.03.09.05	Operate tours in a remote area	3	2+2+6 = 10
	Total 09 units	31	104

CHAPTER 4.04 - MICE (09 Units)
(See also Chapter 1.05 Community & Environment and Chapter 3.08 – Mice / Hotels)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.04.01.05	Plan, develop and evaluate interpretive activities (idem 1.05.xx.05)	3	3+10+3 = 16
4.04.02.05	Develop interpretive content for ecotourism activities (idem 1.05.xx.05)	3	2+5+6 = 13
4.04.03.05	Present interpretive activities (idem 4.05.xx.05)	5	6+10+2+6+5 = 29
4.04.04.05	Plan and develop culturally appropriate tourism operations* (idem 1.05.xx.05)	3	7+10+3 = 20
4.04.05.05	Plan, develop and coordinate an appropriate cultural tourism activity	3	5+9+2 = 16
4.04.06.05	Research and share general information on local ethnic cultures* (idem 1.05.xx.05)	2	6+5 = 11
4.04.07.05	Interpret aspects of local ethnic cultures* (idem 4.05.09.05)	2	2+8 = 10
4.04.08.05	Plan and implement minimal impact operations* (idem 1.05.xx.05)	3	3+3+3 = 9
4.04.09.05	Organize functions (idem 3.05.xx.05)	4	4+4+9+3 = 20
	Total 09 units	28	144

CHAPTER 4.05 - TOUR GUIDING (11 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.05.01.05	Provide Guide services	3	4+3+2 = 9
4.05.02.05	Provide arrival and departure assistance (idem 3.08.xx.05)	4	8+2+3+8 = 21
4.05.03.05	Develop and maintain general knowledge as guides	2	5 + 2 = 7
4.05.04.05	Coordinate and operate a tour	7	3+1+6+8+1+5+3 = 27
4.05.05.05	Lead tour groups	3	8+2+4 = 14
4.05.06.05	Prepare and present tour commentaries	3	4+7+4 = 15
4.05.07.05	Manage extended tours	4	6+8+5+7 = 26

4.05.08.05	Present interpretive activities (idem 4.04.xx.05)	2	6+8 = 14
4.05.09.05	Develop interpretive contents for ecotourism activities (idem 1.05.xx.05 / 4.04.xx.05)	3	2+5+6 = 13
4.05.10.05	Research and share general information on local ethnic cultures (idem 1.05.xx.05 / 4.04.xx.05)	2	6+5 = 11
4.05.11.05	Interpret aspects of local ethnic cultures (idem 1.05.xx.05 / 4.04.xx.05)	2	2+8 = 10
	Total 11 units	35	167

CHAPTER 4.06 - ATTRACTIONS & VISITOR INFORMATION CENTER (21 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.06.01.05	Provide on site information and assistance	2	3+4 = 7
4.06.02.05	Monitor entry to venue	2	3+3 = 6
4.06.03.05	Conduct pre activity briefing	3	6+7+3 = 16
4.06.04.05	Operate a ride location	7	7+4+2+8+4+4+4 = 33
4.06.05.05	Load and unload a ride	3	6+2+3 = 11
4.06.06.05	Maintain safety in water based rides	4	7+3+4+2 = 16
4.06.07.05	Supervise ride locations	4	6+5+7+3 = 21
4.06.08.05	Operate a games location	6	7+2+8+4+3+2 = 26
4.06.09.05	Carry out spruiking	2	5+9 = 14
4.06.10.05	Operate an animal enclosures / exhibit	6	7+5+9+5+3+2 = 31
4.06.11.05	Provide general animal care	5	7+7+5+4+2 = 25
4.06.12.05	Rescue animals	2	4+4 = 8
4.06.13.05	Provide customers with information on animals	2	8+4 = 12
4.06.14.05	Coordinate and monitor animal care	9	3+5+3+4+6+4+4+3+4 = 36
4.06.15.05	Train and condition animals	3	3+5+2 = 10
4.06.16.05	Supervise animal enclosures	5	4+3+3+4+4 = 18
4.06.17.05	Manage animal enclosures / exhibits	3	6+5+3 = 14
4.06.18.05	Sell merchandise (idem 2.01.xx.05)	7	2+5+4+5+4+3+3 = 26
4.06.19.05	Advice on merchandise (idem 2.01.xx.05)	2	2+3 = 5
4.06.20.05	Merchandise products (idem 2.01.xx.05)	5	7+5+3+7+1 = 23
4.06.21.05	Apply Point of Sales Transactions (idem 2.01.xx.05 / 2.02.xx.05)	4	9+7+3+5 = 24
	Total 21 units	86	382

CHAPTER 4.07 - PLANNING & PRODUCT DEVELOPMENT (12 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELM	Total PC
4.07.01.05	Create , implement and evaluate strategic development initiatives (idem 1.02.xx.05)	3	11+3+3 = 17
4.07.02.05	Research tourism data (idem 1.02.xx.05)	3	2+4+3 = 9
4.07.03.05	Source and package tourism products and services (idem 4.02.xx.05)	2	5+8 = 13
4.07.04.05	Plan and implement minimal impact tourism operation (idem 1.05.xx.05)	3	3+3+3 = 9
4.07.05.05	Plan, develop and evaluate interpretive activities (idem 4.04.xx.05)	3	3+10+3 = 16
4.07.06.05	Plan, develop and monitor ecologically sustainable tourism operations (idem 1.05.xx.05)	3	7+6+2 = 15
4.07.07.05	Develop host community awareness of tourism (idem 1.05.xx.05)	2	3+4 = 7
4.07.08.05	Assess and plan tourism opportunities for local communities (idem 1.05.xx.05)	5	4+4+3+3+3 = 17
4.07.09.05	Develop, implement and monitor local / regional plan (idem 1.02.xx.05)	3	10+2+3 = 15
4.07.10.05	Plan, develop and monitor culturally appropriate tourism operations (idem 1.05.xx.05)	3	7+10+3 = 20
4.07.11.05	Develop interpretive contents for ecotourism activities (idem 1.05.xx.05)	3	2+5+6 = 13
4.07.12.05	Create, implement and evaluate strategic product development initiative (idem 4.07.xx.05)	3	11+3+3 = 17
	Total 12 units	36	168

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APEC SKILL STANDARD UNITS
2005

| CHAPTER I.01 - GENERAL CORE UNITS (13 Units) |

SUMMARY OF UNITS

Unit code	Unit Name	Elmts	Total PC
1.01.01.05	Work with colleagues and customers	4	6+7+2+8 = 23
1.01.02.05	Work in a socially diverse environment	2	4+5 = 9
1.01.03.05	Follow health, safety and security procedures	3	3+4+2+2 = 11
1.01.04.05	Follow workplace hygiene procedures	2	2=2 = 4
1.01.05.05	Tidy and maintain workplace station	2	7+7 = 14
1.01.06.05	Handle one point information system	4	6+4+2+ 5 = 17
1.01.07.05	Provide company products information	2	4+4 = 8
1.01.08.05	Communicate on the telephone	2	9+5 = 14
1.01.09.05	Perform clerical procedures	3	3+4+2 = 9
1.01.10.05	Follow operational and/or organizational changes	2	3+4 = 7
1.01.11.05	Provide basic country information	2	4+3 = 7
1.01.12.05	Provide information on APEC Skill Standard	2	1+2 = 3
1.01.13.05	Provide first aid	4	3+2+2=2 = 9
	Total 13 units	**34**	**107**

APEC SKILL STANDARD UNITS CHAPTER 1.01 - DETAILED DESCRIPTION OF UNITS

APEC SS 1.01.01.05
WORK WITH COLLEAGUES & CUSTOMERS

ELEMENTS & PEFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Communicate in the workplace 1) Communications with customers and colleagues are conducted in an open, professional and friendly manner. 2) Appropriate language and tone is used. 3) Effect of personal body language is considered. 4) Sensitivity to cultural and social differences is shown. 5) Active listening and questioning are used to ensure effective two way communications. 6) Potential and existing conflicts are identified and solutions sought with assistance from colleagues where required. **Element 2 – Provide assistance to colleagues and customers** 1) Customers needs and expectations, including those with specific needs, are correctly identified and appropriate products and services are provided. 2) All communications with customers are friendly and courteous. 3) All reasonable needs and requests of customers are met within acceptable enterprise timeframes. 4) Opportunities to enhance the quality of service are identified and taken whenever possible. 5) Customer dissatisfaction is promptly recognized and action taken to resolve the situation according to individual level of responsibility and enterprise procedures. 6) Customer complaints are handled positively, sensitively and politely. 7) Complaints are referred to the appropriate person to follow up in accordance with individual level of responsibility. **Element 3 – Maintain personal and work area presentation standards** High standards of personal presentation are practiced with consideration of: a. work location, b. health and safety issues, c. impact on different types of customers and d. specific presentation requirements for particular work function. 2) Work area and equipment are left in clean and ready-to-use condition when leaving at the end of working shift. **Element 4 – Work in a team** 1) Trust, support and respect is shown to team members in day to day activities. 2) Cultural differences within the team are accommodated. 3) Work team goals are jointly identified. 4) Individual tasks are identified, prioritized, and completed within designated timeframes. 5) Assistance is sought from other team members when required. 6) Assistance is offered to colleagues to ensure designated work goals are met. 7) Feedback and information from other team members is acknowledged. 8) Changes to individual responsibilities are re-negotiated to meet reviewed work goals.	**UNIT VARIABLES** Customers and colleagues include all colleagues and guests entering the property regardless of their purposes. Specific needs may include: disabled or handicapped individuals, unaccompanied children, matured individuals, special cultural needs, parents with babies etc. **ASSESSMENT GUIDE*** Demonstrated ability to communicate effectively with customers and colleagues, including those with special needs, with particular emphasis on listening, questioning, non verbal communications and teamwork principles. Demonstrated ability may be collected over a period of time.

APEC SS 1.01.02.05
WORK IN A SOCIALLY DIVERSE ENVIRONMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Communicate with customers and colleagues from diverse backgrounds 1) Customers and colleagues from all cultural groups are valued and treated with respect and sensitivity. 2) Verbal and non verbal communications takes account of cultural differences. 3) Where language barriers exist, efforts are made to communicate through use of gestures or simple words in the other person's language. 4) Assistance from colleagues, reference books or outside organizations is obtained when required. **Element 2 – Deal with cross cultural misunderstandings** 1) Issues which may cause conflict or misunderstanding in the workplace are identified. 2) Difficulties are addressed with the appropriate people and assistance is sought from team leaders. 3) When difficulties or misunderstandings occur, possible cultural differences are considered. 4) Efforts are made to resolve the misunderstanding, taking account of cultural considerations. 5) Issues and problems are referred to the appropriate team leaders / supervisors for follow up.	**UNIT VARIABLES** Social diversity may include: race, language, age, gender, social status, disabilities, culture and customs, etc. Attempts to overcome social differences may include: greetings, directions, answer to enquiries and services, describe products and services, work ethics, personal appearance, product preferences, etc. **ASSESSMENT GUIDE*** should include demonstrated knowledge to the meaning of 'culturally aware', and may be collected over a period of time.

APEC SS 1.01.03.05

FOLLOW HEALTH, SAFETY AND SECURITY PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Follow workplace procedures on health, safety and security 1) Health, safety and security procedures are correctly followed in accordance with enterprise policy and relevant legislation and insurance requirements. 2) Breaches of health, safety and security procedures are identified and promptly reported. 3) Any suspicious behavior or occurrences are promptly reported to the designated person. **Element 2 – Deal with emergency situations** 1) Emergency and potential emergency situations are promptly recognized and required action is determined and taken with scope or individual responsibility. 2) Emergency procedures are correctly followed in accordance with enterprise procedures. 3) Assistance is promptly sought from colleagues and/or other authorities where appropriate. 4) Details of emergency situations are accurately reported in accordance with enterprise policy. **Element 3 – Maintain safe personal presentation standards** Personal presentation takes account of the workplace environment and health and safety issues including: 1) Appropriate personal grooming and hygiene. 2) Appropriate clothing and footwear. **Element 4 – Provide feedback on health, safety and security** 1) Issues requiring attention are promptly identified. 2) Issues are raised with the designated person in accordance with enterprise and legislative requirements	**UNIT VARIABLES** **HSS procedures** may include: emergency situations, use of personal clothing and equipment, security of documents / goods / equipment, hazard identification and control, safe sitting, lifting and handling position. **Emergency situations** may include: bomb threats, accidents, fire, flood, robbery and armed hold-up, earthquakes. **ASSESSMENT GUIDE*** should include demonstrated understanding of HSS in the workplace, security procedures and the potential implications of disregarding HSS procedures.

APEC SS 1.01.04.05

FOLLOW WORKPLACE HYGIENE PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Follow hygiene procedures 1) Workplace hygiene procedures are strictly flowed in accordance with enterprise standards and legal requirements. 2) Handling and storage of all items is completed in accordance with enterprise standards and legal requirements. **Element 2 – Identify and prevent hygiene risks** 1) Potential hygiene risks are promptly identified. 2) Action is taken to minimize or remove the risk within the scope of individual responsibility and in accordance with enterprise and legal requirements. **Element 3 – Maintain safe personal presentation standards** Personal presentation takes account of the workplace environment and health and safety issues including: 1) Appropriate personal grooming and hygiene. 2) Appropriate clothing and footwear.	**UNIT VARIABLES** **Hygiene procedures** may be related to workplace premises and equipment, desks and stationeries, storage and serving food & beverage, cleaning procedures, garbage handling and personal hygiene on the job. **Appropriate appearance** may include clothing, jewels/accessories worn, shoes, etc. **ASSESSMENT GUIDE***: Understanding of the importance of following hygiene procedures, knowledge of practical work examples, ability to follow established procedures.

APEC SS 1.01.05.05

TIDY AND MAINTAIN WORKPLACE STATION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Tidy up workplace area/station 1) Workplace should be kept clean and tidy at all times during working hours. 2) All equipment is checked to be in clean and safe working condition prior to use. 3) All equipment is cleaned after use in accordance with manufacturer's instructions. 4) Routine maintenance is carried out in accordance with enterprise procedures. 5) Workplace items are placed and stored in the designated locations and in ready-for-use condition. 6) Safety and hygiene procedures are employed in doing workplace activities. 7) Workplace station is left in tidy and well maintained condition when leaving office after work shift. **Element 2 – Maintain workplace premises and equipment** 1) Public areas are regularly checked for cleanliness, safety and customer comfort. 2) Areas to be cleaned is prepared and cleared of hazards. 3) Where appropriate, work station/area is barricaded or signed off to reduce risk to colleagues and customers. 4) Correct chemicals and cleaning are selected for specific areas and applied in accordance with manufacturer and relevant OHSS	**UNIT VARIABLES** Areas for cleaning includes: self work stations and areas surrounding self work station. Waste for cleaning includes stationeries, dust, used tissues and other items and objects usually found in the office. Chemicals and equipment may include: disinfectants, pesticides, cleaning agents, cleaning cloths. **ASSESSMENT GUIDE***: 1) Understanding of the importance of clean and well maintained workplace station to overall image of workplace and to quality of service. 2) Ability to use relevant cleaning equipment and cleaning agents according to enterprise procedures. 3) Ability to use all available and relevant

requirements. 5) Where necessary, protective clothing is selected and used. 6) Equipment is correctly used. 7) Unused and scattered items and objects are disposed of or put in the designation locations in accordance with hygiene, safety and environmental legislation requirements.	workplace equipment. 4) Understand business workplace etiquette as appropriate for the workplace.

APEC SS 1.01.06.05
HANDLE ONE POINT INFORMATION SYSTEM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain valid and accurate information on company's product and service All details of facilities, products and services available is obtained including: a) facilities and services available, b) locations of all facilities, c) electricity voltage and availability of compatible gadget, d) free and/or rental appliances and equipment and their prices and availability, e) in house guests and their room numbers, f) departments or person in charge of different services, g) local destination and transportation information. **Element 2 – Handle all information requests** 1) Calls are answered promptly, clearly and politely in accordance with enterprise standards. 2) Identification of the caller and his/her phone number are correctly and accurately established. 3) The purpose of the call is accurately established. 4) Details are repeated to caller to confirm understanding. **Element 3 – Direct information requests to person in charge** 1) Caller's inquiries are accurately transferred to the appropriate extension / person. 2) Threatening or suspicious phone calls are promptly reported to the appropriate person in accordance with enterprise procedures. **Element 4 – Schedule workplace appointments** 1) Requests for appointments and/or meetings is noted down and checked with the appropriate person. 2) Appointment schedule is confirmed parties concerned. 3) Appointments and details of appointments are reconfirmed with parties concerned prior to the appointed schedule. 4) Preparation for the appointment is made and/or given to appropriate colleague. 5) Reasons for failure to keep appointments are established and courteously explained to external parties.	**UNIT VARIABLES** **Information requested** may include: enterprise facilities, products and services, special facilities and services extended to customers, messages for customers, lost and found items, queries on local destination and transportation, etc. **Appointments** may include personal or business meetings, audiences with external groups, request for presentations or discussions, etc. **Appropriate person** may include direct superior or any other colleagues within the company. **ASSESSMENT GUIDE***: 1). Understanding the importance of handling requests and queries efficiently and effectively to customers. 2) Evidence should include demonstrated ability to correctly use telephone equipment. 3) Evidence of routing special customer request to the appropriate person. 4) Evidence should include demonstrated ability to correctly use telephone equipment and provide courteous and friendly telephone services. 5) Knowledge of enterprise products, facilities, services, colleagues, and other general information within the enterprise. 6) Relevant communication skills.

APEC SS 1.01.07.05
PROVIDE COMPANY PRODUCTS INFORMATION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain valid and accurate information on company profile, products and services 1) All necessary information to assist queries on enterprise products and services is obtained, including: products and services available, facilities and rates. 2) Obtained information is updated according to company policy. 3) Information obtained is shared with colleagues. 4) Information gained from work experience and guests contact is passed to the appropriate person for future updating **Element 2 – Provide information to queries** 1) Accurate information regarding company's product and services is offered to queries. 2) Selling techniques are used to encourage usage and purchase. 3) Customers are made aware of possible extras, add-ons and further benefits. 4) Report queries and entailed results to designated person for follow-up.	**UNIT VARIABLES** Products and services may include available products and service, facilities, banquet facilities, tours and transport, entertainments, shopping arcade, FB facilities, etc **ASSESSMENT GUIDE***: Understanding the importance of handling queries on company's products and services to customers.

APEC SS 1.01.08.05
COMMUNICATE ON THE TELEPHONE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Respond to incoming calls 1) Calls are answered promptly, clearly and politely in accordance with enterprise standards. 2) Identification of the caller and his/her phone number are correctly and accurately established.	**UNIT VARIABLES** Telephone communications may take place in: office, reception area, on tours,

3) Friendly assistance is offered to the caller and the purpose of the call is accurately established. 4) Details are repeated to caller to confirm understanding. 5) Caller's inquiries are answered or transferred to the appropriate location / person. 6) Requests are accurately recorded and passed to the appropriate department / person for follow up. 7) Where appropriate, opportunities are taken to promote enterprise products and services. 8) Messages are accurately relayed to the nominated person within designated timelines. 9) Threatening or suspicious phone calls are promptly reported to the appropriate person in accordance with enterprise procedures.	on site, on mobile phone, with colleagues, with customers.
Element 2 – Make telephone calls	**ASSESSMENT GUIDE***
1) Telephone numbers are correctly obtained. 2) Purpose of the call is clearly established prior to calling. 3) Equipment is used correctly to establish contact. 4) Names of company and reason for calling are clearly communicated. 5) Telephone manner is polite and courteous at all times.	1) Evidence should include demonstrated ability to correctly use telephone equipment and provide courteous and friendly telephone services. 2) Knowledge of specific telephone systems, knowledge of enterprise products, facilities and services, oral communication skills, skills for taking messages.

APEC SS 1.01.09.05
PERFORM CLERICAL PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDE
Element 1 – Process office documents	**UNIT VARIABLES**
1) Documents are processed in accordance with enterprise procedures within designated timelines. 2) Office equipment is correctly used to process documents. 3) Malfunctions of office equipment are promptly identified and rectified or reported in accordance with enterprise procedures.	Documents processed may include recording receipt or sending documents, photocopying, mailing, e-mailing, binding, faxing, collating, banking. Office documents may include guest mails, incoming and outgoing correspondence, facsimiles, menus, memos, customer records, orders and requests, receipts.
Element 2 – Draft correspondence	
1) Text is written using clear and concise language. 2) Spelling, punctuation and grammar correct. 3) Meaning of correspondence is understood by recipient. 4) Information is checked for accuracy prior to sending.	**ASSESSMENT GUIDE*:** Demonstrated ability to process a range of documentation accurately within acceptable timeframes. Written text should be error free and understood.
Element 3 – Maintain document systems	
1) Documents are filed / stored in accordance with enterprise security procedures. 2) Reference and index systems are modified and updated in accordance with enterprise procedures.	

APEC SS 1.01.10.05
FOLLOW OPERATIONAL CHANGES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Follow operational changes made by enterprise and provide feedback on implementation	**UNIT VARIABLES**
1) Procedural and operational changes made by the enterprise are correctly followed according to enterprise guidelines. 2) Issues are promptly identified and discussed with the colleagues and/or other authorities. 3) Implementation results are reported in accordance with company policy and procedures.	Operational changes may be related to standard operating procedures, organization structure, change in company's policies and procedures, change in personnel.
Element 2 – Deal with potential problem in implementation	
1) Potential set backs to the implementation of the new procedures and operations within the scope of individual responsibility are promptly recognized. 2) Assistance is promptly sought from colleagues and/or other authorities where appropriate. 3) Possible solutions are discussed with the designated person in accordance with enterprise policy. 4) Details of problems and their solutions are reported in accordance with enterprise policy.	**ASSESSMENT GUIDE*:** Understanding of the importance of team work and ability to correctly follow procedures set by the company.

APEC SS 1.01.11.05
PROVIDE BASIC (LOCAL) COUNTRY INFORMATION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain valid and accurate information on country	**UNIT VARIABLE**
1) All necessary information to assist queries on local information is obtained, including: a) basic geography, b) demographic information and total population, c) local languages, cultures and custom, d) domestic products information and main trades and businesses, e) environmental	Information may include enterprise products, facilities, services & rates; local attractions & local transport; basic

conditions, f) local attraction and local transport and g) any other basic local/country information. 2) Obtained information is updated according to company policy. 3) Information obtained is shared with colleagues. 4) Information gained from work experience and guests contact is passed to the appropriate person for future updating	geography & demography; environmental issues; language, culture, customs & traditions; etc.
Element 2 – Provide information to queries 1) Accurate information regarding company's product and services is offered to queries. 2) Customers are made aware of high light information. 3) Report queries and entailed results to designated person for follow-up.	**ASSESSMENT GUIDE*:** Demonstrated ability to give general information on country and local tourism and also information on enterprise.

APEC SS 1.01.12.05

PROVIDE BASIC INFORMATION ON APEC SKILL STANDARD

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain valid and accurate information on APEC TOURISM OCCUPATIONAL SKILL STANDARD (APEC TOSS) 1) A range of current and accurate information to assist queries on APEC TOSS is obtained, including: a) basic mechanism and contents, b) usage, c) benefits of using APEC TOSS, d) contact person for detailed information	**UNIT VARIABLES** Information may include units of APEC TOSS and groupings of units, how to use the units for operational purposes, mechanism for manpower mobility.
Element 2 – Provide information to queries 1) Accurate information regarding the APEC TOSS is offered to queries. 2) Inquirers are made aware of specific detailed information	**ASSESSMENT GUIDE*:** Look for ability to define the APEC TOSS and its application for operations, and ability to describe the benefits of using APEC TOSS.

APEC SS 1.01.13.05

PROVIDE FIRST AID

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Assess and respond to emergency first aid situations 1) Emergency situations are quickly and correctly recognized. 2) The situation is assessed and a decision promptly made regarding relevant required action. 3) Assistance from emergency services / colleagues / customers is organized where appropriate.	**UNIT VARIABLES** First aid treatment is an emergency assistance provided to a second party **in the absence of medical or paramedical care**. Injuries may include: cardio-vascular failure, bone and joint injuries, burns, unconsciousness, pre-existing illness, wounds and infections, eye injuries, external bleeding, effect of heat or cold temperature, bites.
Element 2 – Provide appropriate treatment 1) Patient's physical condition is assessed from visible vital signs. 2) First aid is provided to establish the patient's physical and mental condition in accordance with organization policy on provision of first aid and recognized first aid procedures.	
Element 3 – Monitor the situation 1) Back-up services appropriate to the situation are identified and notified. 2) Information on the victim's condition is accurately and clearly conveyed to emergency service personnel.	
Element 4 – Prepare an incident report 1) Emergency situations are documented according to company procedures. 2) Reports provided are clear, accurate and timely.	**ASSESSMENT GUIDE*:** Look for ability to correctly apply a range of first aid techniques to all situations mentioned above.

EMPOWER Associates for APEC TWG, 2005

APEC OCCUPATIONAL SKILL STANDARD UNITS
2005

CHAPTER I.02 - GENERAL ADMINISTRATION & MANAGEMENT (37 UNITS)

Unit code	Unit Name	Elmts	Total PC
1.02.01.05	Develop and implement organizations policies and procedures	3	9+5+4 = 18
1.02.02.05	Coordinate office activities	4	4+5+5+5 = 19
1.02.03.05	Source and present information	2	3+5 = 8
1.02.04.05	Prepare business documents	4	2+3+8+5 = 18
1.02.05.05	Plan and prepare meetings	2	2+3 = 5
1.02.06.05	Receive and store stock	3	3+4+6 = 13
1.02.07.05	Control and order stock	5	6+2+4+3+5 = 20
1.02.08.05	Plan and establish systems and procedures (idem 1.03.08.05)	3	5+3+3 = 11
1.02.09.05	Manage and evaluate projects	3	6+7+4 = 17
1.02.10.05	Plan and establish a small enterprise (SME)	7	6+5+7+3+5+6+3 = 35
1.02.11.05	Minimize and control theft	4	5+4+7+2 = 18
1.02.12.05	Monitor workplace operations (idem 2.03.09.05)	4	5+6+2+5 = 18
1.02.13.05	Develop and implement operational plans	3	9+5+4 = 18
1.02.14.05	Develop, monitor and implement business plan	3	3+4+3 = 10
1.02.15.05	Establish and maintain a safe and secure workplace	8	4+3+5+6+3+1+1+3 = 26
1.02.16.05	Implement workplace health, safety and security procedures	5	3+3+3+3+2 = 14
1.02.17.05	Develop and update legal knowledge required for legal compliance	3	3+5+2 = 10
1.02.18.05	Manage and purchase stock	3	4+5+5 = 14
1.02.19.05	Manage physical assets	3	1+5+5 = 11
1.02.20.05	Develop, implement and monitor local / regional plan	3	10+2+3 = 15
1.02.21.05	Create, implement and evaluate strategic product development initiative (idem 4.07.xx.05)	3	11+3+3 = 17
1.02.22.05	Provide mentoring support to business colleagues (The Buddy System) (idem 2.03.22.05)	2	3+6 = 9
1.02.23.05	Represent enterprise in events	5	6+4+9+11+4 = 34
1.02.24.05	Apply quality standards and procedures	4	3+3+4+2 = 12
1.02.25.05	Update and incorporate external factors/ issues	4	2+4+7+5 = 18
1.02.26.05	Prepare a feasibility study	4	3+3+7+6 = 19
1.02.27.05	Develop, implement and maintain national / local / corporate identity image	4	4+3+9+8 = 24
1.02.28.05	Research data (idem 2.01.xx.05)	3	2+4+3 = 9
1.02.29.05	Manage quality customer service	2	4+6 = 10
1.02.30.05	Operate a small business (SME)	7	8+7+6+5+3+2+3 = 34
1.02.31.05	Develop and update information on APEC Skill Standards	2	3+2 = 5

1.02.32.05	Develop and update basic information on APEC and ASEAN	2	3+2 = 5
1.02.33.05	Develop and update enterprise and local / country information	2	3+2 = 5
1.02.34.05	Deal with conflict situation	3	2+4+6 = 12
1.02.35.05	Implement and monitor continuous improvements systems	3	3+3+3 = 9
1.02.36.05	Conduct meetings	3	3+5+1 = 8
1.02.37.05	Develop and implement special policy and program on trade liberalization	6	3+3+4+3+3+3 = 19
	TOTAL 37 Units	164	530

APEC SKILL STANDARD UNITS CHAPTER 1.02 - DETAILED DESCRIPTION OF UNITS

APEC SS 1.02.01.05
DEVELOP AND IMPLEMENT OPERATIONAL POLICIES AND PROCEDURES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Develop operational plans 1) Plans and strategies are developed based on workplace needs and identification of opportunities for improvement and innovation. 2) Scope of objectives of the required initiative are developed based on a) overall enterprise goals; b) staff and customer feedback; c) monitoring of workplace operations. 3) Internal and external factors which may impact on the system are identified and analyzed. 4) Appropriate colleagues are consulted during the development of the system. 5) Resource strategies are developed. 6) Administrative framework and systems are developed. 7) Priorities, responsibilities, and timelines are clearly identified and communicated. 8) Evaluation systems are developed in consultation with appropriate colleagues. 9) An internal and external communications strategy is developed to keep stakeholders informed. **Element 2 - Apply and monitor operational plans** 1) Identified actions are implemented and monitored in accordance with agreed priorities. 2) Support and assistance is provided to colleagues involved in implementing the plan. 3) Reports are provided in accordance with enterprise requirements. 4) Financial control systems are implemented and monitored. 5) Additional resource requirements are implemented and monitored. **Element 3 - Conduct on-going evaluation** 1) Agreed evaluation methods are used to assess effectiveness in the workplace. 2) Evaluation involves all appropriate colleagues. 3) Problems are identified and adjustments are made accordingly. 4) Results and evaluation are incorporated into on-going planning and operational management.	**UNIT VARIABLES** Operational policies & procedures are usually related to efficient and effective workplace operations and the establishment or review of SOP either for or entire workplace operations. **ASSESSMENT GUIDE*** 1) Look for skills and knowledge of planning techniques, problem solving and decision making in operations, the ability to integrate necessary issues within the plan and the ability to apply related knowledge to specific context of the plan. 2) Demonstrated knowledge in establishing a realistic plan, regulations and liabilities appropriate to the specific operation, current and potential operational trends, communications, and research skills. 3) Understand specific implementation issues which may affect the plan.

APEC SS 1.02.02.05
COORDINATE OFFICE ACTIVITIES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Maintain office procedures 1. Organization policies, procedures and systems are correctly carried out. 2) Special requests and requirements are reported and resolved with appropriate colleague in accordance with enterprise procedures. 3) In-appropriate occurrence is promptly reported according to enterprise procedures. 4) Office supplies are regularly monitored, recorded and reordered as required according to enterprise procedures. **Element 2 - Process data in response to information requests** 1) Requests for information are documented and responded according to enterprise procedures. 2) Relevant external information sources are identified and accessed. 3) Where available information does not match defined needs, options and alternatives are identified and offered. 4) Relevant information is extracted and edited as required. 5) Information records is updated and compiled according to enterprise policy and procedures. **Element 3 – Compose reports and correspondence** 1) Correspondence is written as required. 2) Correspondence is drafted according to enterprise correspondence system. 3) Text is written in clear, concise and easily understood language. 4) Correct spelling, punctuation and grammar are confirmed. 5) Out-going correspondence is copied and filed according to enterprise filing system. **Element 4 – Maintain existing recording and filing system** 1) Record system is maintained according to enterprise policy. 2) Documents are archived and removed according to enterprise policy. 3) New documents are archived to pre-designated category. 4) Document movement is carefully monitored to prevent loss and to maintain confidentiality. 4) Confidential files are separated from general files for access to only nominated person/s. 5) Back-up system is established to ensure safety, security and confidentiality of information.	**UNIT VARIABLES** Office coordinated may include the whole enterprise or divisions or sub-divisions of the enterprise. **ASSESSMENT GUIDE***: 1) Demonstrated skills and knowledge in the roles and responsibilities in work operations, related SOP. 2) Ability to effectively monitor and respond to a range of common operational workplace issues. 3) Ability to accurately understand enterprise correspondence and filing system.

APEC SS 1.02.03.05
SOURCE AND PRESENT INFORMATION*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & PERFORMANCE GUIDE
Element 1 – Find information 1) A range of current and accurate information sources is correctly identified. 2) Information sources are accessed and assessed for relevance and applicability. 3) Information is obtained within designated timeline. **Element 2 - Prepare and present information** 1) Information is reviewed and selected to suit the specific needs. 2) Where appropriate, text is drafted to include all appropriate information. 3) When presented, the range of information provided is structured and expressed in a clear and concise manner. 4) Information is presented in a professional manner appropriate for the circumstances. 5) Information is made available to the appropriate person within designated timelines	**UNIT VARIABLES** Presentations may be internal or external and may include sales presentations, training delivery, presentations within meetings, conference addresses, staff briefings etc. **ASSESSMENT GUIDE***: 1) Ability to demonstrate basic research skills, extracting necessary information, sorting and processing information. 2) Ability in planning presentation, public speaking knowledge, written and oral communications skills. 3) Ability to identify important issues, review and present information effectively. 4) Knowledge on subject matter for specific presentations

APEC SS 1.02.04.05
PREPARE BUSINESS DOCUMENTS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Determine document requirements 1) Requirements and objectives are clearly defined in consultation with appropriate colleagues. 2) Specialist assistance is obtained where appropriate within budget parameters. **Element 2 – Conduct research** 1) Research is conducted according to scope of the project. 2) Informal and formal data collection methods are employed as appropriate. 3) Data is analyzed and assessed for relevance prior to incorporation in document. **Element 3 - Prepare and systemize documents** 1) Document structure and content is developed to reflect objectives. 2) A Range of written presentation and graphic techniques are used to enhance the impact and effectiveness of the information presented. 3) Information is expressed in a manner which takes account of the impact of document on the intended audience. 4) Key issues are identified and analyzed. 5) Recommendations for actions are included where appropriate. 6) Quality of information is reviewed and adjusted where necessary. 7) Text is checked for accuracy prior to finalization. 8) Document presentation is appropriate for the intended audience. **Element 4 – Follow-up documents** 1) Document is presented / circulated as appropriate. 2) Presentation / circulation is followed up with appropriate action. 3) Any recommendations are reviewed according to agreed priorities. 4) Actions are undertaken in full consultation with colleagues. 5) Where appropriate submissions are made to management regarding implementation of document recommendations.	**UNIT VARIABLES** Business documents may include reports, submissions, proposals, and tenders etc. **ASSESSMENT GUIDE***: 1) Demonstrated ability in written communication including expressions and explanation of varied and complex issues. 2) Ability to demonstrate basic research skills, extracting necessary information, sorting and processing information and written and oral communications skills. 3) Report writing and presentation techniques.

APEC SS 1.02.05.05
PLAN AND PREPARE MEETINGS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan meeting 1) Need for meeting and relevant participants are identified. 2) Meeting arrangements are made in accordance with requirements and within budget parameters and designated timelines. **Element 2 – Prepare meeting** 1) Agenda is developed according to purpose of meeting. 2) Information on agenda items is obtained or researched to allow informed discussions at the meeting. 3) Where appropriate, meeting papers are prepared and dispatched to participants within appropriate timelines	**UNIT VARIABLES** Types of meetings may include formal & informal meetings, one-off, ad-hoc & regular meetings, and other types of meetings **ASSESSMENT GUIDE***: 1) Ability to demonstrate knowledge in meeting procedures and protocols. 2) Time management. 3) Written communication skills specifically in relation to the conduct of meetings. 4) Ability to efficiently and effectively plan meetings.

APEC SS 1.02.06.05
RECEIVE AND STORE STOCKS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Take delivery of stocks 1) Incoming stock is accurately checked against orders and delivery documentation in accordance	**UNIT VARIABLES** Stock may include food & beverage,

with enterprise procedures. 2) Variations are accurately identified, recorded and communicated to the appropriate person. 3) Items are inspected for damage, quality, expiry dates, breakages or discrepancies, and records are made in accordance with enterprise policy.	equipment, linen, room supplies & amenities, stationery, brochures, vouchers & tickets, souvenirs.
Element 2 – Store stock	**ASSESSMENT GUIDE***
1) All stock is promptly and safely transported to appropriate storage area without damage. 2) Stock is stored in the appropriate location within the area and in accordance with enterprise procedures. 3) Stock levels are accurately recorded in accordance with enterprise procedures. 4) Stock is labeled in accordance with enterprise procedures.	Ability to demonstrate competence and knowledge in stock security and safety system; stock control documentation; safe lifting and handling procedures; food & beverage hazards, health and hygiene procedures when applicable.
Element 3 – Rotate and maintain stock	
1) Stock is rotated in accordance with enterprise policy. 2) Stock is moved in accordance with safety and hygiene requirements. 3) Quality of stock is checked and reported. 4) Excess stock is placed in storage or disposed of in accordance with enterprise policy. 5) Stock area is maintained in accordance with enterprise and/or government requirements and problems promptly identified and reported. 6) Stock recording system is used in accordance with speed and accuracy requirements.	

APEC SS 1.02.07.05
CONTROL AND ORDER STOCK*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Maintain stock levels and records	**UNIT VARIABLES**
1) Stock levels are monitored and maintained at levels prescribed by enterprise levels. 2) Stock security systems are monitored and adjusted as required. 3) Stock re-order cycles are maintained, monitored and adjusted as required. 4) Colleagues are informed of their individual responsibilities in regard to recording stock. 5) Stock storage and movement records are maintained in accordance with enterprise procedures. 6) Stock performance is monitored and fast/slow selling items are identified and reported in accordance with enterprise procedures.	Stock may include food & beverage, equipment, linen, room supplies & amenities, stationery, brochures, vouchers & tickets, souvenirs.
Element 2 - Organize and administer stock takes	Stock control system may be manual or computerized.
1) Stock takes are organized at the appropriate time and responsibilities allocated to staff. 2) Accurate reports on stock take date are produced within designated timelines.	
Element 3 - Identify stock losses	**ASSESSMENT GUIDE***
1) Losses are accurately identified, recorded and assessed against potential loss forecast on a regular basis. 2) Losses are reported in accordance with enterprise procedures. 3) Avoidable losses are identified and reasons are established. 4) Solutions are recommended and implemented to prevent future avoidable losses.	Ability to demonstrate competence and knowledge in stock level maintenance; typical stock taking procedures; stock recording system; stock security system; and ability to meet accuracy and speed requirements for maintaining enterprise stocks.
Element 4 - Process stock order	
1) Orders for stock are accurately processed in accordance with enterprise procedures. 2) Stock ordering and recording systems are accurately maintained. 3) Purchase and supply agreements are correctly used and appropriate details recorded.	
Element 5 – Follow-up orders	
1) Delivery process is monitored to meet agreed deadlines. 2) Liaison is undertaken with colleagues and suppliers to ensure continuity of supply. 3) Routine supply problems are followed up or referred to the appropriate person in accordance with enterprise policy. 4) Stock is distributed in accordance with agreed allocations.	

APEC SS 1.02.08.05
PLAN AND ESTABLISH SYSTEMS AND PROCEDURES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan systems and procedures	**UNIT VARIABLES**
1) System and procedural requirements are identified and clarified through workplace monitoring and on-going consultations with colleagues and customers. 2) Problem areas are identified and prompt action is taken. 3) Possible responses are identified and developed in consultation with colleagues. 4) Responses take account of immediate operational needs and enterprise goals. 5) Human and financial issues are taken into consideration.	Systems and procedures include all general and departmental standard operating procedures.
Element 2 – Establish systems and procedures	**ASSESSMENT GUIDE***: 1) Ability to demonstrate skills and knowledge in basic principles of planning; in-depth knowledge of the specific work area operation; related legislative framework. 2) Ability to develop and implement systems and procedures. 3) Ability to identify issues that may arise in the development and implementation process.
1) Advance notice of new systems and procedures is provided to colleagues. 2) System and procedures are introduced to the workplace in a manner which causes minimum disruption to customers and colleagues. 3) Training and support is provided as required.	
Element 3 - Review systems and procedures	
1) Efficiency and effectiveness of the new system is monitored in the operation. 2) Suggestions for	

improvements are sought from colleagues at all levels. 3) Adjustments are promptly made.	

APEC SS 1.02.09.05
MANAGE AND EVALUATE PROJECTS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan project 1) Project scope and objectives are developed in consultation with appropriate colleagues and customer. 2) Project priorities, responsibilities and timelines are agreed with the customer and communicated to appropriate colleagues. 3) Resource and budgeting strategy for the project is identified. 4) Administrative structure of the project is established. 5) Evaluation system is developed in consultation with appropriate colleagues. 6) Key project milestones are identified and communicated. **Element 2 – Administer and monitor project** 1) Project is implemented and monitored according to established guidelines. 2) Support and assistance is provided to team members. 3) Progress against project goals is assessed and reviewed in consultation with the team members and the customer. 4) Additional resource requirements are assessed and action taken accordingly. 5) Financial control system is implemented and monitored according to project guidelines. 6) Regular report on project progress is provided to all appropriate colleagues and customer. 7) Project is finalized within agreed timelines. **Element 3 – Evaluate project** 1) Agreed evaluation system is used to assess the effectiveness of implementation at specified stages. 2) Evaluation takes account of agreed goals and priorities. 3) Results of evaluation are incorporated into on-going project management. 4) Information from project evaluation is shared with appropriate colleagues and customer.	**UNIT VARIABLES** Projects may include conference & meetings, promotions, introduction of new product or system, product development, research project, on-going business projects. **ASSESSMENT GUIDE***: 1) Ability to demonstrate skills and knowledge in project management system & processes, in-depth knowledge of the nature of the project being managed, skills in planning, leadership, finance and administration. 2) Ability to effectively plan, carry our, monitor and evaluate projects. 3) Understanding of critical elements of effective project management.

APEC SS 1.02.10.05
PLAN AND ESTABLISH A SMALL ENTERPRISE (SME)*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify business opportunity 1) Sources of data for business opportunity is correctly identified and accessed. 2) Necessary data for the study is collected, listed and reviewed with colleagues and related parties. 3) Government regulations is identified, assessed and incorporated in the process. 4) Business opportunity is thoroughly identified and assessed. 5) Principles of the business are developed. 6) Strength, weakness, opportunity and threats to the new business are accurately listed. **Element 2 – Plan products and services** 1) Products and services are formulated and assessed. 2) Market demands, economic factors, and other relevant issues are taken into account is formulating the products and services. 3) Products and services are priced to achieve market acceptance and enterprise expected profit. 4) An appropriate mix of products / services is determined to meet customer requirements and enterprises expected objectives. 5) A business development schedules is established is stages of accomplishment. **Element 3 – Develop budget** 1) Expenses for the business is correctly and meticulously identified and calculated. 2) Current and valid prices for materials and labor costs are obtained. 3) Add-on costs are estimated. 4) Contingencies are correctly and accurately incorporated. 5) Revenues to be generated are correctly and meticulously identified and calculated. 6) Estimated return on investment is correctly and meticulously calculated and incorporated into the report. 7) Deviation to the estimated budget is correctly identified and calculated **Element 4 – Develop marketing plan** 1) Formal and informal market research / observation are conducted to determine marketing strategy. 2) A basic and simple marketing plan is developed. 3) Marketing and sales budget is accurately calculated to achieve balanced operations. **Element 5 – Develop operational system** 1) A simple operational plan to run the business is developed. 2) Suitable book keeping system and records are developed according to established practice. 3) Suitable filing and administrative procedures are developed according to established practice. 4) Suitable financial system is developed according to established practice. 5) Financial and operational control system is developed according to established practice.	**UNIT VARIABLES** **This unit is suitable** for planning a small business. **ASSESSMENT GUIDE*:** 1) Evidence should include knowledge and skills in OHS regulation, environmental requirements, taxation requirements, insurance legislation, etc. 2) Underpinning skills and knowledge include: business planning principles, basic accounting/bookkeeping procedures, filing system, staffing principles, principles of planning, impacts of external and internal factors to business, and communication and leadership skills.

Element 6 –Develop organization structure 10 A simple organizational structure is established according to the products and services, and operational and marketing activities. 2) Efficient estimated staff to run the business is identified. 3) Job description for each staff is efficiently established. 4) Cost of personnel is efficiently calculated. 5) Sources of staff are identified. 6) Training and induction program is planned. **Element 7 – Comply with legal requirements** 1) Relevant permits and regulations for the products and services are identified. 2) Relevant business records, legal documentation, business name and license are registered according to legislative requirements. 3) Operation and process comply with relevant legislation and industrial requirements.	

APEC SS 1.02.11.05

MINIMIZE AND CONTROL THEFT*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish security system for internal thefts 1) Security system, policy and procedures to minimize theft is identified and established. 2) Established system is clearly communicated to all personnel. 3) Security surveillance system and equipment are promptly identified, assessed and place in the proper location. 4) Security responsibility is delegated to appropriate section and staff. 5) Training and exercise are provided as necessary. **Element 2 – Apply routine security checks** 1) Enterprise security system and procedures is applied appropriately. 2) Cash is handled and secured according to enterprise policy and procedures. 3) Suspicious behavior is observed, assessed and dealt with according to enterprise policy. 4) Theft is dealt with according to enterprise policy and procedures. **Element 3 – Minimize theft in the guest room (for hotels)** 1) Appropriate action is taken to minimize theft according to enterprise policy and procedures. 2) All enterprise equipment and furniture are listed out and properly filed. 3) Linen and fixtures are advised to guests when checking in. 4) Purchase advice for items in the guest room is placed in appropriate location in the room. 5) Valuable items of guests are properly advised to be kept in the safety box provided. 6) Room equipment, furniture & fixture and linen are appropriately checked prior to payment and check-out. 7) Loss items are dealt with according to enterprise policy and procedures. **Element 4 – Minimize internal theft** 1) Special entry/exit is provided for all staff. 2) Enterprise security system and procedures is appropriately applied to all staff.	**UNIT VARIABLES** The following variables may be present enterprise policies & procedures, government security regulations, size & type of enterprise, enterprise merchandise and service range, special security for merchandise, types of security equipment. Security procedures may deal with customers & visitors, fulltime & part time staff, keys, stock, correspondence, cash & credit, equipment, premises, armed hold-up. **ASSESSMENT GUIDE** 1. Ability to demonstrate skills and knowledge in enterprise security policy, relevant security regulation for customers and staff, merchandising system, security procedures in handling cash, credit / debit cards, transactions, security of furniture, fixture & equipment, reporting procedures for theft. 2) Ability to follow security procedures. 3) Demonstrated knowledge to prevent theft in retail business.

APEC SS 1.02.12.05

MONITOR WORKPLACE OPERATIONS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Monitor and improve workplace operations 1) Efficiency and service levels are monitored on an on-going basis. 2) Operations in the workplace support overall enterprise goals and quality assurance initiative. 3) Quality problems and issues are promptly identified and adjustments are made accordingly. 4) Procedures and systems are changed in consultation with colleagues to improve efficiency and effectiveness. 5) Colleagues are consulted about ways to improve efficiency and service levels. **Element 2 - Plan and organize workflows** 1) Current workload of colleagues is accurately assessed. 2) Work is scheduled in a manner which enhances efficiency and customer service quality. 3) Work is delegated to appropriate people in accordance with principles of delegation of work and authority. 4) Workflow is assessed against agreed objectives and timelines. 5) Colleagues are assisted in prioritization of workload. 6) Input is provided to appropriate management regarding staff needs. **Element 3 - Maintain workplace records** 1) Workplace records are accurately completed and submitted within required timeframes. 2) Where appropriate completion of records is delegated and monitored prior to submission. **Element 4 - Solve problems and make decisions** 1) Workplace problems are promptly identified and considered from an operational and	**UNIT VARIABLES** Problems may include difficult customer service situations, equipment breakdown/technical failure, delays and time difficulties. Workplace records may include staff records and regular performance reports. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence, skills and knowledge in the roles and responsibilities in monitoring work operations, overview of leadership and managerial responsibilities, principles of work planning, related SOP, quality assurance principles, time management, principles of delegation, problem solving and decision making process, and related legislative issues. 2) Ability to effectively monitor and respond to a range of common operational

customer service perspective. 2) Short term actions are initiated to resolve the immediate problem where appropriate. 3) Problems are analyzed for any long-term impact and potential solutions are assessed and carried out in consultation with relevant colleagues. 4) Where problem is raised by a team member, they are encouraged to participate in solving the problem. 5) Follow up action is taken to monitor the effectiveness of solutions in the workplace.	workplace issues. 3) Knowledge of principles of workflow planning, delegation and problem solving. 4) Knowledge of government regulations which affect short term work process.

APEC SS 1.02.13.05

DEVELOP AND IMPLEMENT OPERATIONAL PLANS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Develop the operational plan 1) Plans and strategies are developed based on workplace needs and identification of opportunities for improvement and innovation. 2) Scope and objectives of the required initiative are developed based on: overall enterprise goals, staff & customer feedback, and monitoring of workplace operations. 3) Internal and external factors which may impact on the plan are identified and analyzed. 4) Appropriate colleagues are consulted during the development of the plan. 5) Resource strategies are developed. 6) Administrative framework and systems are developed. 7) Priorities, responsibilities and timelines are clearly identified and communicated. 8) Evaluation systems are developed in consultation with appropriate colleagues. 9) An internal and external communications strategy is developed to keep stakeholders informed. **Element 2 - Implement and monitor operational plan** 1) Identified actions are implemented and monitored in accordance with agreed priorities. 2) Support and assistance is provided to colleagues involved in implementing the plan. 3) Reports are provided in accordance with enterprise requirements. 4) Financial control systems are implemented and monitored. 5) Additional resource requirements are assessed and carried out in accordance with enterprise policy. **Element 3 – Conduct on-going evaluation** 1) Agreed evaluation methods are used to assess efficiency and effectiveness in the workplace. 2) Evaluation involves all appropriate colleagues. 3) Problems are identified and adjustments are made accordingly. 4) Results of evaluation are incorporated into on going planning and operational management.	**UNIT VARIABLES** Operational plan is usually related to efficient and effective workplace operations and the establishment or review of SOP. **ASSESSMENT GUIDE*** 1) Look for skills and knowledge of planning techniques, problem solving and decision making in operations, the ability to integrate necessary issues within the plan and the ability to apply related knowledge to specific context of the plan. 2) Demonstrated knowledge in establishing a realistic plan, regulations and liabilities appropriate to the specific operation, current and potential operational trends, communications, and research skills. 3) Understand specific implementation issues which may affect the plan.

APEC SS 1.02.14.05

DEVELOP, IMPLEMENT AND MONITOR BUSINESS PLAN*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Develop business plan 1) A business plan is prepared using recognized business planning techniques to include the following issues: a. mission statement; b. business objectives; c. current and potential products; d. industry environment; e. external business environment; f. market analysis; g. marketing strategy; h. operational strategy; i. management / organizational structure; j. labor regulations and qualification; k. financial plan and P/L projection; l. action plan and timeframes; m. evaluation techniques; n. business ethics; o. liability and legal issues; p. environmental considerations; q. local community issues; r. quality work process. 2) The business plan is prepared after consultation with colleagues, staff and stakeholders. 3) Contingency plans are established and taken into consideration in view of the changing external and internal circumstances. **Element 2 – Implement the business plan** 1) The objectives and content of the plan is communicated in a timely manner to appropriate personnel in a manner which facilitates a clear understanding of the plan and its role and a clear understanding of objectives, activities and individual responsibilities. 2) Appropriate communication and leadership techniques are employed in the management of the business plan to encourage: a. teamwork approach; b. staff commitment to targets and service quality. 3) Staff is encouraged to provide ongoing input to the business plan. 4) Actions detailed in the plan are implemented cost efficiently. **Element 3 – Monitor the business plan** 1) Business plan is regularly reviewed and revised according to changing overall circumstances. 2) Activities are monitored according to established methods on an on going basis to check progress towards objectives, individual activities and contribution to the goals, and the need to assert established a contingency plan. 3) Contingency plan are promptly implemented according to management decision.	**UNIT VARIABLES** Business plan may include: a new business venture, an existing business, a division or department of an establishment, a new product development initiative. **ASSESSMENT GUIDE*** 1) Look for ability to develop and implement a realistic business plan, the ability to integrate necessary issues within the plan and the ability to apply related knowledge to specific context of the plan. 2) Demonstrated knowledge in business planning techniques, legal and business liabilities appropriate to business context, current and potential economic trends, communications, leadership and research skills. 3) Understand specific implementation issues which may affect the plan.

APEC SS 1.02.15.05

ESTABLISH AND MAINTAIN A SAFE AND SECURE WORKPLACE *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish and maintain a framework for health, safety and security (HSS) 1) HSS policies are developed and clearly expressed in enterprise policies. 2) HSS responsibilities and duties are clearly defined, allocated and included in job descriptions and duty statements for all relevant positions. 3) Financial and human resources are identified, sought, and/or provided in a timely and consistent manner. 4) Information on the occupational HSS system and procedures is provided and explained in a form readily accessible to employees. **Element 2 – Establish and maintain participative arrangements for the management of HSS** 1) Appropriate consultative processes are established and maintained. 2) Issues from participation and consultation are dealt with and resolved promptly and effectively. 3) Information about the outcomes of participation and consultation is provided in a manner accessible to employees. **Element 3 – Establish and maintain procedures for identifying hazards and risks** 1) Existing and potential hazards and risks are correctly identified and assessed. 2) A procedure for on-going identification and assessment is developed and integrated within work systems and procedures. 3) Activities are monitored to ensure that this procedure is adopted effectively. 4) Hazard identification and risk assessment are addressed at the planning, design and evaluation stages of any change in the workplace to ensure that new hazards and risks are not created. 5) Risks presented by identified hazards are correctly assessed in accordance with Occupational Health and Safety legislation and codes of practice. **Element 4 – Establish and maintain procedures for controlling hazards and risks** 1) Measures to control assessed risks are developed and implemented. 2) When measures, which control a risk at its source, are not immediately practicable, interim solutions are implemented until a permanent control measure is developed. 3) A procedure for on-going control of risks is developed and integrated within general systems of work and procedures. 4) Activities are monitored to ensure that the risk control procedure is adopted. 5) Risk control is addressed at the planning, design and evaluation stages of any changes within the area of management responsibility to ensure that adequate risk control measures are included. 6) In-adequacies in existing risk control measures are identified in accordance with the hierarchy of control and resources enabling implementation of new measures are sought and/or provided according to appropriate procedures. **Element 5 – Establish and maintain organizational procedures for dealing with hazardous events** 1) Potential hazardous events are correctly and promptly identified. 2) Procedures which could control the risks associated with hazardous events and meet any legislative requirements as a minimum are developed in consultation with appropriate emergency services. 3) Appropriate information and training is provided to all employees to enable implementation of the correct procedures in all relevant circumstances. **Element 6 – Establish and maintain an occupational health and safety training program** An occupational health and safety training program is developed and monitored. **Element 7 – Establish and maintain a system for occupational health and safety records** A system for keeping occupational health and safety record is established and monitored. **Element 8 - Evaluate the organization's HSS system** 1) Effectiveness of the HSS system and related policies, procedures and program is assessed to according to the organization's aims with respect to occupational HSS. 2) Improvements to the occupational health and safety system are developed and implemented. 3) Compliance with occupational HSS and codes of practice is assessed to ensure that legal occupational HSS standards are maintained as a minimum.	**UNIT VARIABLES** Hazards or risks may include workplace sickness, fire, crowd related risks, accidents, bomb scares, theft and armed robbery, deranged customers, equipment failure, weather emergencies, and pests. **ASSESSMENT GUIDE*** 1) Demonstrated skills and knowledge in relevant government occupational HSS legislation as it affect the workplace operations. 2) Knowledge of relationship between SOP and HSS. 3) Look for ability to develop a framework for HSS system for specific operation.

APEC SS 1.02.16.05

IMPLEMENT WORKPLACE HSS* (Health, Safety and Security) PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Provide information on HSS issues 1) Relevant information is accurately and clearly explained to staff. 2) Specific enterprise information on HSS is accurately and clearly explained to staff. 3) All information is readily accessible to staff. **Element 2 – Coordinate staff participation in HSS issues** 1) All staff members are given the opportunity to contribute to the management of HSS in the workplace. 2) Issues raised through consultation are carried out, resolved or referred to the appropriate person for follow up. 3) Feedback is provided on management systems to the designated person.	**UNIT VARIABLES** Hazards or risks may include workplace sickness, fire, crowd related risks, accidents, bomb scares, theft and armed robbery, deranged customers, equipment failure, weather emergencies, and pests.

	ASSESSMENT GUIDE*
Element 3 – Implement and monitor procedures for controlling hazards and risks 1) Workplace hazards and risks are identified and reported. 2) Control procedures are implemented and monitored in accordance with enterprise and government regulations. 3) In-adequacies in control measures are promptly identified and reported to the appropriate person. **Element 4 – Implement and monitor HSS training** 1) Training needs are accurately identified based on close monitoring in the workplace. 2) Arrangements are made for fulfilling training needs in consultation with appropriate management and accordance with enterprise policy. 3) Effectiveness of training is monitored in the workplace and adjustments made as necessary. **Element 5 – Maintain HSS records** Records are accurately and legibly completed and stored in accordance with enterprise and legal requirements. 2) Data is used to provide reliable input to the management of workplace HSS issues.	1) Demonstrated skills and knowledge in relevant government occupational HSS legislation as it affect the workplace operations. 2) Knowledge of specific enterprise policies and procedures. 3) Ability to monitor HSS within the context of an established system where policies, procedures and programs exist. 4) Knowledge of required elements of HSS regulations.

APEC SS 1.02.17.05

DEVELOP AND UPDATE LEGAL KNOWLEDGE FOR BUSINESS COMPLIANCE *

ELEMENT & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Research and find the legal information required for business compliance 1) Sources of legal information and advice are accurately identified and accessed. 2) Information is selected and analyzed for relevance to the business. 3) Information is recorded and/or distributed. **Element 2 – Ensure compliance with legal requirements** 1) Need for legal advice is assessed and sought where appropriate. 2) Information is shared with appropriate work colleagues in a timely manner. 3) Where appropriate information updates and training are organized for colleagues and staff. 4) Workplace systems and procedures are established and monitored to ensure compliance with legal requirements. 5) Aspects of operations which may infringe laws are identified and modifications are promptly developed and implemented. **Element 3 - Update legal knowledge** 1) Informal and formal research is used to update the legal knowledge required for business compliance. 2) Updated knowledge is shared with colleagues and incorporated into workplace planning and operations.	**UNIT VARIABLES** Source of legal information may include reference books, media, associations, journals, internet, customers & suppliers, legal experts. **ASSESSMENT GUIDE ***: 1) Ability to demonstrate skills and knowledge in the legal aspects of contract, insurance, customer protection, trade practices, licensing, industrial relations, taxation, equal employment opportunity, business statutory, research skills, responsibilities / liabilities of enterprise. 2) Understanding of the legislation that affects operations. 3) Knowledge on how and when to update information.

APEC SS 1.02.18.05

MANAGE AND PURCHASE STOCK *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish and implement an order and supply process 1) An order and supply process is established and implemented in the workplace. 2) Economic order quantity is established based on internal data and supplier advice. 3) Stock levels are determined according to peak seasons, special events and supplier's lead time. 4) Process is developed to include monitoring of quality during supply and delivery process. **Element 2 – Establish and implement stock control systems** 1) Stock control systems are developed and communicated to all appropriate staff. 2) Special control systems are applied to items showing high wastage of loss. 3) A range of data is used to calculate standards methods and measures and these are communicated to appropriate staff. 4) Systems are monitored in the workplace and adjustments made according to feedback and operational experience. 5) Staffs are trained to minimize stock wastage. **Element 3 – Develop optimum supply arrangements** 1) Quality of supply is evaluated based on feedback from colleagues and customers. 2) Potential suppliers are sourced and reviewed against enterprise requirements. 3) Purchase specifications are developed. 4) Suppliers are assessed against specifications. 5) Sources of supply are amended in accordance with assessment.	**UNIT VARIABLES** Stock may include food & beverages, linen, housekeeping supplies & room amenities, stationery, cleaning agents & chemicals, groceries & general store. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in methods of stock evaluation, methods of yield testing, planning, supplier and stock market knowledge. 2) Ability to develop stock purchasing and control system within enterprise context.

APEC SS 1.02.19.05
MANAGE PHYSICAL ASSETS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop strategies for systematic maintenance, repair and purchase of physical assets Strategies for managing physical assets are developed to take account of the following issues: a) Overall business and marketing objectives; b) Appropriate product development plans; c) Upkeep of physical assets register; d) The need for preventive repairs and maintenance system; e) HSS issues; f) Scheduling to minimize disruption of production and loss of revenues; g) Use of contracts versus ad-hoc arrangements for maintenance and repairs; h) Professional evaluation of the condition of physical assets; i) Financial planning and constraints; and j) Environmentally sound practices. **Element 2 – Monitor the performance of physical assets in the workplace** 1) Systems are set up to ensure that condition and performance of physical assets is regularly reported and discussed within the enterprise. 2) Systems are established to identify timely replacement of physical assets. 3) Assessments are based on safety operational efficiency and customer service quality. 4) Problems are promptly identified and acted upon. 5) Specialist assistance is accessed when required. **Element 3 - Coordinate financing of physical assets maintenance** 1) Work or equipment specifications are accurately prepared. 2) Costs are estimated based on evaluation of: a) quotations and tenders from external supplies; b) Appropriate maintenance agreements; c) In-house advice from appropriate departments. 3) Appropriate financial agreements are made based on consideration of financing issues, including: a) Methods of financing (lease, purchase, hire purchase etc); b) Length of agreement; c) Taxation issues. 4) Depreciation is taken into account. 5) Financing is coordinated in consultation with financial management department or external professional companies.	**UNIT VARIABLES** Physical assets may include: buildings, equipment, furniture, fittings & furnishings, vehicles, gardens, pools, rides & games. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in overview of financing options for assets acquisition, laws governing different types of assets, environmental standards and requirements, planning. 2) Ability to plan for and manage the acquisition, maintenance and replacement of physical assets of the company. 2) Understanding of financial and legal issues that impact on the management of physical assets.

APEC SS 1.02.20.05
DEVELOP, IMPLEMENT AND MONITOR LOCAL / REGIONAL DEVELOPMENT PLAN*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop local/regional plans 1) Plans are drafted within the context of the organizational overall development approach. 2) Plans include an inventory of available infrastructure and the carrying capacity. 3) Products and service gaps are identified. 4) Plans are drafted to take account of the level of community and industry resources. 5) Impact on the community are considered and incorporated into the planning process including environmental, social & cultural and economic factors. 6) Development initiatives within the plan are both culturally and environmentally appropriate for the region. 7) Community is consulted throughout the planning process. 8) Plans are developed to include a clear strategic and tactical focus. 9) Scheduled courses of action and evaluation methods are included. 10) Plans are submitted for approval to the appropriate authority within agreed timeframes. **Element 2 – Implement plans** 1) Actions detailed in the plan are implemented according to schedule and contingencies. 2) Community is consulted and involved on an on-going basis. **Element 3 – Monitor and evaluate plans** 1) Activities are monitored using the evaluation methods detailed in the plan on an on-going basis to take account of the following factors: a. progress towards objectives; b. evaluation of individual activities; c. the need for changes to the plan. 2) Any changes required are submitted for consideration and approval by the appropriate authority. 3) Agrees changes to the plans are promptly implemented and communicated.	**UNIT VARIABLES** Research may include local, regional or enterprise context. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in strategic planning techniques & practices, in-depth appreciation of the region where the plan is being developed (cultural, physical, social and environmental), knowledge of the industry in relation to supply, demand and opportunities, industry structures applied to the region. 2) Ability to apply the total planning process to the development of specific regional plan. 3) Ability to implement and monitor operational plan. 4) Detailed knowledge of issues that apply to the development and administration of the plan.

APEC SS 1.02.21.05 / APEC SS 4.07.xx.05
CREATE, IMPLEMENT AND EVALUATE STRATEGIC PRODUCT DEVELOPMENT INITIATIVE *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare product development plan 1) Product development plan is developed within the context of the overall business plan and marketing focus of the enterprise. 2) Product development opportunities are identified based market analysis and customer needs and expectations. 3) Plan takes account of input from both internal and external	**UNIT VARIABLES** Product development may cover new product or product diversity, special product programs, new customer

resources. 4) Market research is incorporated into planning process. 5) Plans consider the requirements of different customers including those with special needs. 6) Issues relating to product life cycles are considered in the planning process. 7) Budgetary and cash flow planning issues are incorporated. 8) Cost effectiveness and profitability is assessed. 9) External issues are incorporated as appropriate. 10) Relevant external issues are reviewed and incorporated, including: a. Legal and liability; b. Environmental; c. Cultural; d. General industry trends; e. National and local government regulations; f. Budget parameters; operational development. 11) Clear and schedule courses of action and evaluation criteria are incorporated.

Element 2 – Prepare product development plan

1) The objective and contents of product development plan are communicated promptly to all appropriate colleagues and customers. 2) Actions detailed in the plan are implemented according to agreed timelines. 3) Where appropriate, new products and services are tested in the market prior to implementation.

Element 3 – Monitor and evaluate product development

1) Product development initiatives are regularly monitored in terms of: a. Progress against agreed objective, schedule and evaluation criteria; b. Response of market; c. Feedback from distribution network; d. Feedback from staff; e. Internal and external changes; f. Cost effectiveness and profitability. 2) Necessary changes are identified and carried out in a timely manner. 3) Changes are communicated to all relevant colleagues and customers.

service features, building of new facilities or equipment purchase, shows, exhibition etc.

ASSESSMENT GUIDE*: 1) Ability to demonstrate competence and knowledge of planning & project management, insurance issues of the product/program, environmental regulations, area market knowledge, understanding of profit/benefit issues against costs/disadvantages. 2) Ability to plan, implement and evaluate product development initiative. 3) Knowledge and understanding of all issues affecting the initiative.

APEC SS 1.02.22.05

PROVIDE MENTORING SUPPORT TO BUSINESS COLLEAGUES* (THE BUDDY SYSTEM) (IDEM 2.03.xx.05)

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish relationship with business colleagues 1) Effective communication styles are used to develop trust, confidence and rapport. 2) Agreements are made on how the relationship will be conducted including: a. The amount of time involved for both parties; b. confidentiality of information; c. scope of issues to be covered. **Element 2 – Offer mentoring support** 1) The colleague is assisted to identify and evaluate options to achieve goals. 2) Personal experiences and knowledge are shared with the colleague to assist in progress towards goals. 3) The colleagues is encouraged to make decisions and take responsibility for the courses of action / solutions under consideration. 4) Supportive advice and assistance is provided in a manner which allows the colleague to retain responsibility for achievement of his/her own goals. 5) Changes in the mentoring relationship are recognized and openly discussed. 6) Adjustments to the relationship take account of the needs of both mentor and the colleague.	**UNIT VARIABLES** Mentor and colleagues assisted should work within the same company. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence, skills and knowledge in mentoring: its role and benefits, communication skills, related operational details. 2) Ability to use knowledge and experience to assist others and application of communication skills.

APEC SS 1.02.23.05

REPRESENT ENTERPRISE IN EVENTS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare administrative arrangement 1. Information pertinent to the event is correctly obtained. 2) The cost and benefit of attending the event is fairly analyzed. 3) The affect of attending such event to self duties is fairly analyzed. 4) Details of participation including the benefits of participation to enterprise are reported to management or the appropriate person according to enterprise procedures for permit to participation and costs involved. 5) Administrative requirements and procedures are appropriately processed. 6) Legal requirements are processed where appropriate. **Element 2 – Prepare materials and participation** 1) Issues or topics of the event are identified and assessed. 2) Enterprise views and policy regarding the issue of the event are obtained from the appropriate person or management. 3) The extent of achieved enterprise goals/ objectives from the event is clarified from the management or appropriate person. 4) Supporting documents and related materials for active participation and representation of the enterprise are properly collected or made and prepared for the trip. **Element 3 – Represent organization** 1. All sessions of the event are duly attended. 2) The event program is thoroughly assessed for active participation in the discussions. 3) Appropriate communication skills are employed all through the event. 4) Problematic issues are negotiated by bringing up different types of views together. 5) Enterprise point of views is properly communicated in a diplomatic manner. 6) Use appropriate formality or informality	**UNIT VARIABLES** **Events** may include: internal and external meetings & discussions, conferences, displays, exhibitions, trade marts, workshops, etc. **Active participation** may include: presentation, take part in discussions, off-sessions discussions and meetings with certain individuals, distribution of enterprise brochures to delegates, practicing sales techniques to visitors and buyers, negotiation on enterprise or self behalf, etc. **Documents and materials** for the event may include previous documents and files regarding the issue, display materials, history of similar or same issue, brochures & samples of commodities, laptops & LCD projector,

depending on the event and the party. 7) Use appropriate specialized vocabulary according to the progress of the discussion. 8) Generate possible solutions to the problem and try to achieve agreement on a win-win basis. 9) The interests of the enterprise should supersede other interests all through the duration of the event. 10) High lights of the discussions are noted down for documentation and future references. 11) Important papers and materials are obtained for documentation and future references.

Element 4 – Liaise and negotiate with others

1) Issues needed to negotiate are identified and assessed. 2) Strategy developed to possible solutions with the best results. 3) Negotiations are conducted in a businesslike and professional manner. 4) Negotiations are conducted in the context of the entire interest of the organization. 5) Negotiations are conducted to take account of the overall relationship between the organization and the other party. 6) Communication / negotiation style is appropriate to the circumstances. 7) Negotiation and communication techniques are used to maximize the chances of an acceptable win-win outcome for all parties. 8) Agreements are noted and confirmed in writing as required. 9) Relevant information is passed to the controlling office.

Element 5 – Report results and proceedings to management

1. Report of the participation is completed within enterprise timeframes and according to enterprise procedures. 2) Hi-lights of the event are presented when appropriate. 3) Future recommendations regarding participation in the event and reference for the enterprise are listed for future planning. 4) Follow up actions are carried out and/or implemented.

souvenirs, blank contracts, etc.

Document and materials to bring home may include: brochures from other companies, papers and presentations, and all other things pertinent to enterprise.

ASSESSMENT GUIDE*:

1) Underpinning skills and knowledge include: relevant negotiation and communications skills, knowledge of enterprise and products, language as proper to the event, etc.

2) Evidence should include ability to negotiate and exercise communication skills, language proficiency as proper for the event, ability to give presentation materials, ability to properly represent the enterprise.

APEC SS 1.02.24.05
APPLY QUALITY STANDARDS AND PROCEDURES*

ELEMENTS & PERFORMACE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Interpret quality standards 1) Workforce standards are identified and interpreted. 2) Organizations quality requirements are identified and understanding is confirmed. 3) All documentation is handled and completed in accordance with organization procedures. **Element 2 – Apply quality standards** 1) Standards are applied for individual and team related services. 2) Performance is compared to documented requirements. 3) Non-compliance to quality standards is detected. **Element 3 – Report on quality performance** 1) Quality system documentation report is completed. 2) All relevant data is recorded. 3) Instances of non-compliance are recorded in standard format. 4) Recommendations for improving workplace procedures/services/activities are communicated to appropriate personnel. **Element 4 – Participate in quality improvement** 1). Performance monitoring to ensure product or service standards are maintained or improved is continued. 2) Participation in organization quality improvement processes occur where applicable.	**UNIT VARIABLES** Documentation may include processes & procedures, organization mission statement / goal / objectives, reports, checklists, customer feedback forms, non-compliance record. **ASSESSMENT GUIDE:** 1) Ability to demonstrate skills and knowledge in organization standards and quality requirements, related documentation, application of required standards, interpretation of standards, monitoring of performance, preparation & presentation of recommendations. 2) Evidence should include demonstrated ability to detect errors and independently take appropriate action, make suggestions for improvements to quality standards and specification, promote the quality concept within the workplace, operate as member of a workplace team, and communicate openly in the monitoring of procedures and quality practices.

APEC SS 1.02.25.05
UPDATE AND INCORPORATE EXTERNAL ISSUES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine document requirements 1) Requirements and objectives are clearly defined in consultation with appropriate colleagues. 2) Specialist assistance and publication reference is obtained where appropriate within budget parameters. **Element 2 – Obtain and analyze data** 1) Observation is conducted according to scope of the project. 2) Informal and formal data collection methods are employed as appropriate. 3) Data is analyzed and assessed for relevance and importance prior to incorporation in document. 4) Proactive and anticipative approach is used in selecting relevant data for incorporation **Element 3 – Update and incorporate issues in planning** 1) Proactive approach is used in updating and incorporating planning. 2) Key issues are identified and analyzed. 3) Quality of information is reviewed and adjusted where necessary. 4) Potential and possible changes are identified and incorporated to business strategy. 5)	**UNIT VARIABLES** **External issues** may include all external factors and issues which impact the business and business operations. **External issues** may include: government policy and regulations in trade, industry, services and development, labor conditions & regulations, supply and demand pattern and changes, environmental issues, tax, monetary & fiscal regulations, foreign exchange & investment policies, consumer behavioral changes, marketing & sales pattern & changes, political influences & changes, industrial operational development & changes, introduction new technology & equipment

Recommendations for actions are included where appropriate. 6) Several contingency options are made to planning. 7) Range of written presentation and graphic techniques are used to enhance the impact and effectiveness of the information presented.	in operations and others.
Element 4 – Follow-up actions	**ASSESSMENT GUIDE*:**
1) Document is presented / circulated as appropriate. 2) Presentation / circulation are followed up with appropriate action. 3) Any recommendations are reviewed according to agreed priorities. 4) Actions are undertaken in full consultation with colleagues. 5) Where appropriate submissions are made to management regarding implementation of document recommendations.	Ability to evaluate and overview economic, industrial, social & environmental situations, economic terminology, political influences, import & export policies, other related government policies & regulations, industrial relationship.

APEC SS 1.02.26.05
PREPARE A FEASIBILITY STUDY *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify project's objectives and goals	**UNIT VARIABLES**
1) Project's objectives and goals are clearly defined and agreed upon with related parties. 2) Project scheduling and stages are clearly defined. 3) Research method is selected in accordance with objectives and goals.	Feasibility study may be for a new enterprise or extension of product lines, new product launch, launching a new marketing concept etc.
Element 2 – Gather data and conduct research	
1) Sources of data is correctly identified and accessed. 2) Necessary data for the study is collected, listed and reviewed with colleagues and related parties. 3) External and internal environment analysis is conducted, assessed and incorporated in the process.	**ASSESSMENT GUIDE*:** Ability to demonstrate competence and knowledge in report preparation and writing, sequencing the issues of a project, principles of profit and loss projections, research methodologies and practices, overall issues affecting the study.
Element 3 – Prepare project cost	
1) Expenses for the whole project are correctly and meticulously identified and calculated. 2) Current and valid prices for materials and labor costs are obtained. 3) Add-on costs are estimated. 4) Contingencies are correctly and accurately incorporated. 5) Revenues to be generated are correctly and meticulously identified and calculated. 6) Estimated return on investment is correctly and meticulously calculated and incorporated into the report. 7) Deviation to the estimated budget is correctly identified and calculated	
Element 4 – Develop proposal	
1) Framework of project proposal is established and reviewed with relevant parties within agreed timelines. 2) Data collected is incorporated in accordance with the framework. 3) Contingency plan is included in the proposal. 4) Final proposal is reviewed and discussed with the study team prior to submission. 5) The final proposal is submitted within agreed timeframe. 6) A covering letter is issued for the proposal and includes expected timelines for discussion.	

APEC SS 1.02.27.05
DEVELOP, IMPLEMENT AND MAINTAIN IDENTITY IMAGE *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan identity image	**UNIT VARIABLES**
1) Identity image to be developed is clearly established and defined in consultation with appropriate colleagues. 2) Objectives of the identity image are established in consultation with relevant colleagues, specialist assistance, client feedback and publication reference. 3) Economic and social impacts are considered in the planning process. 4) Strategies to balance economic viability and image identity are developed as part of the planning process.	Identity image may include: organization logos and symbols, personnel attitude, oral communication of personnel, standard operating procedures, special activities for customers and staff.
Element 2 – Obtain information and integrate	Information sources may include: government bodies, industry associations, customer association, cultural and traditional sources, ethnic groups, other companies etc.
1) Sources for information are correctly identified and accessed. 2) Formal and informal data collecting techniques are used to access current, accurate and relevant information on customer preferences. 3) Data is analyzed and assessed for best impacts on business prior to integration of image into operational and marketing strategies.	
Element 3 – Incorporate identity image in business strategy	Impacts on business may include: economic benefits, improved facilities, employment opportunities, physiological benefits, greater understanding with customers.
1) Formulated image is integrated in business plans and strategies including, but not limited to: a) overall enterprise goals; b) standard operating procedures; c) workplace operational plans and d) marketing materials; e. décor ambience. 2) Internal and external factors which may impact on the image are identified and analyzed. 3) Appropriate colleagues and experts are consulted during the development of the image. 4) Copyright & intellectual property issues are considered. 5) Colleagues are educated about the new image and its role for the organization and business. 6) Appropriate behaviors are encouraged through training and education. 7) The new image is promoted throughout the organization and with customers. 8) Feed back and evaluation systems are developed in consultation	**ASSESSMENT GUIDE*:** 1) Ability to demonstrate knowledge in the role and impacts of identity image, knowledge in

with appropriate colleagues. 9) Stakeholders are kept informed.

Element 4 – Implement and monitor program

1) Identified actions are implemented and monitored. 2) Support, training and assistance is provided to colleagues involved in implementing the plan. 3) Reports are provided in accordance with enterprise requirements. 4) Financial control systems are implemented and monitored. 5) Additional resource requirements are implemented and monitored. 6) The SOP is regularly monitored to ensure that appropriate practices are maintained. 7) Regular evaluation is conducted with colleagues and customers. 8) Issues are dealt with promptly and changes are considered to continually improve organization image and practices.

organization identity image, organizing and planning. 2) Ability to integrate identity image into overall product development process and practices. 3) Training or assessment process should involve the organization's identity image 'expert'. 4) Research and / or data collecting techniques.

APEC SS 1.02.28.05 (IDEM 2.01.11.07)
RESEARCH DATA*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify research needs 1) Specific research needs are identified based on current business focus and needs of the organization. 2) Objectives of the research are developed in consultation with relevant colleagues and authorities. **Element 2 – Conduct research** 1) Research method is selected in accordance with objectives. 2) Where appropriate, documentation required for the research program is prepared. 3) Where appropriate, specialist assistance is obtained. 4) Research is conducted within agreed timeframes, in accordance with research methodology and budget parameters. **Element 3 – Interpret and apply research results** 1) Data collected is accurately analyzed and interpreted. 2) Results are used to inform current activities and future planning. 3) Research results are communicated to appropriate colleagues and external agencies in a timely manner with appropriate recommendations and observations.	**UNIT VARIABLES** Research methods may include questionnaires and surveys, interviews, focus groups, electronic polling, evaluating secondary data, desk research. Research may be related to customer preference, general visitor patterns, evaluation of marketing initiative, distribution network, potential product development initiative **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in research techniques & methodologies, role of research and sources of research data. 2) Ability to apply research knowledge to conduct research.

APEC SS 1.02.29.05 (IDEM 2.01.07.05)
MANAGE QUALITY CUSTOMER SERVICE*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop and implement approaches to enhance customer service quality 1) Informal and formal research is used to obtain information on customer needs, expectations and satisfaction level. 2) Changes in internal and external environments are considered in quality service planning. 3) Opportunities for colleagues to participate in the customer service planning process are provided. 4) Approaches are developed and communicated to colleagues and customers. **Element 2 – Monitor and adjust** 1) Customer service standards are monitored in the workplace in accordance with enterprise policies and procedures. 2) Feedback is sought on an on-going basis. 3) Coaching is used to assist colleagues to deal with customer service issues. 4) Colleagues are encouraged to take responsibility for customer service. 5) Customer service problems are identified and adjustments made accordingly to ensure continued service quality. 6) Adjustments are communicated to all those involved in service delivery within appropriate timeframes.	**UNIT VARIABLES** Formal and informal research on customer needs may include talking to customers, qualitative or quantitative research, feed back from service delivery colleagues, analysis of competitive environment and industry and market trends analysis. **ASSESSMENT GUIDE***: 1) Ability to demonstrate knowledge and competence in the principles of quality assurance, industry and market knowledge, competitive environment, overview of product development from quality assurance perspective. 2) Ability to develop pro-active approaches and enhancement of customer service.

APEC SS 1.02.30.05
OPERATE A SMALL BUSINESS (SME)*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Manage and train staff 1) Organization structure, principles of delegation and authority, reporting and control systems and procedures are established and maintain. 2) Job description for each staff is determined, carried out and monitored. 3) Staff roster system is established and implemented. 4) Formatted operational procedures and task performance standards are developed and implemented. 5) Training programs are identified and provided. 6) Regular informal meetings are scheduled to monitor operational efficiency. 7) Staff appraisal system are set up and monitored. 8) Equal Employment Opportunity (EEO) is adhered in the recruitment and placement process.	**UNIT VARIABLES** **This unit applies** to all small and medium businesses. **ASSESSMENT GUIDE***:

Element 2 – Manage finances 1) All operational costs are accurately estimated and monitored on a weekly basis. 2) Monthly and annual budget are developed, implemented and regularly monitored. 3) Cash flow budgeting procedures are developed, implemented and monitored. 4) Techniques to evaluate operational productivity are developed, implemented, monitored and reviewed on a regular basis. 5) Procedures for identifying and controlling fraudulent practices are established and monitored. 6) Taxation and insurance requirements are adhered and monitored. 7) External accounting and management services are identified and utilized as appropriate. **Element 3 – Manage sales and marketing** 1) Market segmentation is analyzed to determine intended market for products and service. 2) Selling prices are accurately calculated and estimated, taking into account the expected operational profit margins. 3) Marketing and sales plan is developed, implemented, monitored and reviewed on a weekly, monthly and annual basis. 4) Sales mix, customer preferences and market trends are obtained and analyzed for preparing the marketing plan. 5) Low cost marketing techniques are identified and used as appropriate. 6) Contingency plan is carried out at appropriate time. **Element 4 – Manage stock** 1) Systems to establish purchase specifications and quality characteristics for office and product operation are set up, implemented and monitored. 2) Cost/benefit evaluation of control mechanism for small business are identified, established and implemented. 3) Appropriate internal control systems are developed, implemented and monitored. 4) Stock and wastage control systems are set up and implemented. 5) Contracts with suppliers are negotiated. **Element 5 – Manage property** 1) Utility cost control procedures are set up, implemented and monitored. 2) Supply, repair and maintenance of equipment is reviewed and negotiated. 3) Equipment cleaning and service schedules are established and strictly implemented and monitored. **Element 6 – Manage safety and security** 1) Requirements for safety and security are identified and incorporated in the operation and monitored on an on going basis. 2) Security services are evaluated and contracted as appropriate. **Element 7 – Manage legal issues** 1) Public risk factors including environmental issues are considered and appropriate insurance taken out. 2) Permits and licenses are obtained and renewed at appropriate times. 3) Statutory records requirements are kept and maintained.	1) Ability to demonstrate skills and knowledge in business principles, principles of management, operational systems and procedures, related OHS issues, EEO issue, relevant regulations, communication skills as adhered to managing staff and customers, principles of financial management. 2) Evidence should include records of operational systems and procedures, records of financial and bookkeeping administration, records of marketing and sales activities and achievements, ability to explain the business and flow of operation of the business, records of staff management & training, and other necessary records pertaining to operation.

APEC SS 1.02.31.05

DEVELOP AND UPDATE INFORMATION ON APEC SKILL STANDARDS* (APEC SS)

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop information 1) Sources for information on APEC SS are correctly identified and accessed. 2) Information is recorded and filed for further use as appropriate. 3) Information commonly requested by customers is correctly identified and obtained, including: : a) basic mechanism and contents, b) usage, c) benefits of using APEC SS, d) contact person for detailed information **Element 2 – Update information** 1) Informal and/or formal research is used to update information. 2) Updated information is shared with customers and colleagues and incorporated into day to day working activities	**UNIT VARIABLES** Information on APEC may include the total concept of APEC SS for efficient operational performance and manpower mobility within the region; basic groupings of SS units; how to use the units for operational purposes; benefits of using the units for operation; using the units for developing the tourism industry, the roles of APEC SS for business cooperation and investments; etc **ASSESSMENT GUIDE*** should include demonstrated broad knowledge on APEC SS, its role and benefits for operations, assessment principles etc.

APEC SS 1.02.32.05

DEVELOP AND UPDATE INFORMATION ON APEC AND ASEAN *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop information 1) Sources for information on enterprise products and local / country information are correctly identified and accessed. 2) Information is recorded and filed for further use as appropriate. 3) Information commonly requested by customers is correctly identified and obtained, including: a) tourism products and attractions; b) how to get there, c) local transport custom; d) local languages, cultures and custom, and e) any other frequently sought information. **Element 2 – Update information** 1) Informal and/or formal research is used to update information. 2) Updated information	**UNIT VARIABLES** Sources of information may include APEC and ASEAN Secretariat, national authorities in charge of regional cooperation, industry association etc. Information may include natural resources, demography, geography, trade & business, population, tradition, culture, customs, fauna & flora etc. **ASSESSMENT GUIDE*** should include demonstrated

is shared with customers and colleagues and incorporated into day to day working activities	broad knowledge on APEC and ASEAN.

APEC SS 1.02.33.05
DEVELOP AND UPDATE LOCAL / COUNTRY INFORMATION*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop information 1) Sources for information on enterprise products and local / country information are correctly identified and accessed. 2) Information is recorded and filed for further use as appropriate. 3) Information commonly requested by customers is correctly identified and obtained, including: a) enterprise products and services, facilities and rates; b) local attractions, local transport and local custom; c) basic geography, d) demographic information and total population, e) local languages, cultures and custom, f) domestic products information and main trades and businesses, g) environmental conditions, h) any other basic local/country information. **Element 2 – Update information** 1) Informal and/or formal research is used to update information. 2) Updated information is shared with customers and colleagues and incorporated into day to day working activities	**UNIT VARIABLES** Information may include enterprise products, facilities, services & rates; local attractions & local transport; basic geography & demography; environmental issues; language, culture, customs & traditions; etc. **ASSESSMENT GUIDE*** should include demonstrated broad knowledge on enterprise and local / country information and its role and benefits for enterprise and country.

APEC SS 1.02.34.05
DEAL WITH CONFLICT SITUATIONS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify conflict situations 1) Potential for conflict is promptly identified and swift and careful action is taken to prevent escalation. 2) Situations where safety of customers and colleagues may be threatened are quickly identified and appropriate assistance is organized. **Element 2 – Resolve conflict situations** 1). Responsibility is taken for finding a solution to the conflict within scope of individual responsibility. 2) All points of view are encouraged, accepted and treated with respect. 3) Effective communication skills are used to assist in the management of the conflict. 4) Accepted conflict resolution techniques are used to manage the conflict situation and develop solutions. **Element 3 – Respond to customer complaints** 1) Complaints are handled sensitively, courteously and discreetly. 2) Responsibility is taken to resolve the complaints. 3) The nature and details of the complaint are established and agreed with the customer. 4) Appropriate action is taken to resolve the complaint to the customer's satisfaction wherever possible. 5) Where appropriate, techniques are used to turn complaints into opportunities to demonstrate high quality customer service. 6) Any necessary documentation is completed accurately and legibly within time constraints.	**UNIT VARIABLES** Conflict situations may include customer complaints, conflicts among work colleagues, refused entry, drug or alcohol affected person, ejection from premises, delayed customer. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in conflict resolution skills, communication skills, problem solving skills, procedures for customer complaints. 2) Look for knowledge of conflict resolution techniques. 3) Ability to apply conflict resolution techniques to reverse conflicts and complaints into positive image to the enterprise.

APEC SS 1.02.35.05
IMPLEMENT AND MONITOR CONTINUOUS IMPROVEMENT SYSTEMS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Implement continuous improvement systems and processes 1) All staff are actively encouraged and supported to participate in decision making process and assume responsibility and authority. 2) The organization's continuous improvement process is communicated to individuals and teams. 3) Mentoring and coaching support ensures that individual/teams are able to implement the organization's continuous improvement system. **Element 2 – Monitor, adjust and report performance** 1) The organization's systems and technology are used to monitor progress and to identify ways in which planning and operations could be improved. 2) Customer service is strengthened through the use of continuous improvement techniques and processes. 3) Plans are adjusted and communicated to those who have a role in their development and implementation. **Element 3 – Consolidate opportunities for further improvement** 1) Individual / teams are informed of savings and productivity improvements in achieving the business plan. 2) Work performance is documented and the	**UNIT VARIABLES** A range of learning methods may be used: mentoring, coaching, exchange/rotation, action learning, shadowing, structured training program. **ASSESSMENT GUIDE:*** 1) Ability to demonstrate competence and knowledge in working with teams; communication skills; principles, philosophies & concept of continuous improvement; mentoring & coaching; monitoring; customer service; planning change; innovation; documentation of performances; information management; interpretation of 'results'. 2) Evidence should include: explain the organization's continuous improvement methods, use routine information appropriate to work responsibility, manage work effectively to achieve goals and results, monitor/introduce ways to improve performance, encourage ideas and feedback to improve processes, promote available learning methods to assist colleagues, use simple

information is used to identify opportunities for further development. 3) Records, reports and recommendations for improvement are managed within the organization's systems and processes.	information management systems, and select and use available technology appropriate to task.

APEC SS 1.02.36.05
CONDUCT MEETINGS*

ELEMENTS & PERFORMACE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Check meeting documents 1) All relevant documents prepared for the meeting is thoroughly check for validity and accuracy. 2) Information sources are accessed and assessed for relevance and applicability. 3) Information is obtained within designated timeline. **Element 2 - Conduct Meeting** 1) Prepared documents for the meeting are distributed prior to the meeting. 2) Meeting is conducted in a professional manner according to the appropriate protocol. 3) Meeting is conducted according to the prepared agenda. 4) Participative system is properly exercised. 4) Discussions are correctly and accurately recorded. 5) Excerpt of the meeting is shared with all participants for comments and changes. **Element 2 - Follow up meeting** Minutes of the meeting are promptly distributed to all participants within designated timelines.	**UNIT VARIABLE** Types of meetings may include formal & informal meetings, one-off, ad-hoc & regular meetings, and other types of meetings. **ASSESSMENT GUIDE***: 1) Ability to demonstrate knowledge in meeting procedures and protocols. 2) Time management. 3) Oral communication skills specifically in relation to the conduct of meetings. 4) Ability to efficiently and effectively conduct meetings.

APEC SS 1.02.37.05
DEVELOP AND IMPLEMENT SPECIAL POLICY AND PROGRAM ON TRADE LIBERALIZATION *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop information on trade liberalization 1) Sources for information on trade liberalization are correctly identified and accessed. 2) Information is recorded and filed for further use as appropriate. 3) Information commonly requested by customers is correctly identified and obtained, including: a) the impact of trade liberalization to business, customers and workers; b) how the process works; c) the advantages and disadvantages of the trade liberalization, c) how to make the best of the changes brought forward by trade liberalization; d) derivative commitments by local government, e) any other frequently sought information. **Element 2 – Provide information on Trade Liberalization** 1) Relevant information is accurately and clearly explained to staff. 2) Specific enterprise policy with regard to the Trade Liberalization is accurately and clearly communicated to all staff. 3) All information is readily accessible to staff. **Element 3 – Coordinate staff participation in Trade Liberalization policy** 1) All staff members are given the opportunity to contribute to the enterprise trade liberalization policy. 2) Issues raised through discussion are reviewed, resolved or referred to the appropriate person for follow up. 3) Feedback is provided according to enterprise policy. 4) Results are incorporated into workplace operations. **Element 4– Establish systems and procedures** 1) Advance notice of new policy on trade liberalization and entailing workplace procedures is provided to colleagues. 2) System and procedures are introduced to the workplace in a manner which causes minimum disruption to customers and colleagues. 3) Training and support is provided as required. **Element 5 – Implement training on enterprise policy in Trade Liberalization training** 1) Training needs are accurately identified based on close monitoring in the workplace. 2) Arrangements are made for fulfilling training needs in consultation with appropriate management and accordance with enterprise policy. 3) Effectiveness of training is monitored in the workplace and adjustments made as necessary. **Element 6 - Review and update systems and procedures** 1) Efficiency and effectiveness of the new system is monitored in the operation. 2) Suggestions for improvements are sought from colleagues at all levels. 3) Adjustments are promptly made.	**UNIT VARIABLES** **ASSESSMENT GUIDE***: 1) Underpinning skills and knowledge include understanding of the mechanism of global distribution system and how global mechanism can affect the business and career opportunities. 2) Evidence should include ability to transfer information clearly and in simple language, ability to obtain and update information, ability to understand the importance of trade liberalization, ability to understand the impacts of trade liberalization on business and career opportunities, ability to use the information for the benefits of enterprise and self.

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER I.03 - COMPUTER & MANAGEMENT INFORMATION SYSTEM UNITS (10 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Elmts	Total PC
1.03.01.05	Access and retrieve computer data	3	4+5+3 = 12
1.03.02.05	Produce documents on computer	4	5+6+5+3 = 19
1.03.03.05	Design and develop computer documents, reports and worksheet	3	6+6+4 = 16
1.03.04.05	Operate an automated information system	3	4+2+4 = 10
1.03.05.05	Monitor and maintain computer system	3	4+9+5 = 18
1.03.06.05	Operate a computerized reservation system (idem 3.03.10.05)	3	2+4+2 = 8
1.03.07.05	Maintain a product information inventory	4	2+2+3+3 = 10
1.03.08.05	Plan and establish system and procedures (idem 1.02.08.05)	3	5+3+3 = 11
1.03.09.05	Access and interpret information (idem 4.02.xx.05	3	2+2+4 = 8
1.03.10.05	Source and package information and advice (idem 4.02.xx.05	3	4+3+4 = 11
	TOTAL 10 UNITS	**32**	**123**

APEC TOSS UNITS CHAPTER 1.03 - DETAILED DESCRIPTION OF UNITS

APEC SS 1.03.01.05

ACCESS AND RETRIEVE COMPUTER DATA *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1 – Open file 1) Computer is turned on correctly. 2) Appropriate software is selected form the menu. 3) File is correctly identified and opened. 4) Keyboard is operated within designated speed and accuracy requirements. **Element 2 – Retrieve and amend data** 1) Data to be retrieved is located within file. 2) Copy of the data is printed as required. 3) Information for editing is correctly identified. 4) Information is keyed-in, changed or deleted using appropriate input device. 5) Data is regularly saved to avoid loss of information. **Element 3 – Close and Exit** 1) File is correctly saved and closed. 2) Software is properly exited. 3) Computer is switched off correctly.	**UNIT VARIABLES** Computer and soft ware used will vary depending upon enterprise business and activities. **ASSESSMENT GUIDE*:** 1) Ability to demonstrate competence and knowledge in basic database functions, data entry, and efficient keyboarding / typing. 2) Look for ability to accurately enter and amend data within designated timelines.

APEC SS 1.03.02.05

PRODUCE DOCUMENTS ON COMPUTER*

ELEMENTS & PERFORMACE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 - Create computer data 1) Computer is correctly turned on. 2) Disks are formatted as appropriate. 3) Appropriate software is selected from menu. 4) New file is created, formatted and named as required. 5) Format is discussed and clarified with the person requesting the document where appropriate. **Element 2 – Produce document** 1) Keyboard is operated within designated speed and accuracy requirements. 2) Documents entered are accurate reflection of original text. 3) Documents are keyed in the required style and format and within designated timelines. 4) Documents are saved regularly to avoid loss of data. 5) Spelling and grammar is checked. 6) Draft is proof-read and changes / correction made prior to print out. **Element 3 – Print and deliver document** 1) Print preview is used to check document format and lay out. 2) Printer is switched on and hubbed to the computer. 3) Appropriate stationery is loaded into printer. 4) Document is printed out as required. 5) Document is delivered to the appropriate person within designated timelines. **Element 4 – Save, exit and switch off** 1) Files are saved, closed and exited according to correct procedures. 2) Disks are filed and stored in accordance with enterprise policy and procedures. 3) Back up files is made in accordance with enterprise policy and procedures.	**UNIT VARIABLES** Computer and soft ware used will vary depending upon enterprise business and activities. **ASSESSMENT GUIDE*:** 1) Ability to demonstrate competence and knowledge in appropriate computer system, written communication skills, efficient keyboarding / typing, working knowledge of soft wares used by the enterprise. 2) Look for ability to consistently produce accurate documents in the required format within accepted enterprise timelines, understanding of various applications of software, and speed and accuracy of keyboarding / typing according to enterprise standards.

APEC SS 1.03.03.05

DESIGN AND DEVELOP COMPUTER DOCUMENTS, RECORDS AND WORKSHEETS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine Presentation and format of document 1) Software most appropriate to the nature of the document is selected from a range of options. 2) Layout and style of document are selected according to particular information and presentations requirements. 3) Document design is consistent with enterprise guidelines. 4) Document format is created ready for entry of information. 5) Format and presentation are discussed and clarified with the person requesting the document. 6) Format and presentation take account of the audience for whom the document is intended. **Element 2 – Produce document**	**UNIT VARIABLES** Computer and soft ware used will vary depending upon enterprise business and activities. **ASSESSMENT GUIDE*:** 1) Ability to demonstrate competence and

1) Keyboard is operated within designated speed and accuracy requirements. 2) Documents entered are clearly and accurately presented using a broad range of software systems. 3) Information from other documents is integrated as required. 4) Documents are saved regularly to avoid loss of data. 5) Spelling and grammar is checked. 6) Draft is proof-read and changes / correction made prior to print out.	knowledge in appropriate computer systems, application software for word processing, database and spreadsheet. 2) Look for ability to develop and produce professional and accurate documents for a range of situations enterprise contexts. 3) Appropriate formatting of documents.
Element 3 – Print and deliver document	
1) Print preview is used to check document format and lay out. 2) Printer is switched on and hubbed to the computer. 3) Appropriate stationery is loaded into printer. 4) Document is printed out as required. 5) Document is delivered according to requirements.	

APEC SS 1.03.04.05
OPERATE AN AUTOMATED INFORMATION SYSTEM *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Access information on an automated system 1) Information requirements are correctly identified and clarified. 2) The system is correctly and efficiently accessed. 3) Appropriate search methods are selected for the type of information required. 4) Features of the system are used to access and manipulate the full range of system information. **Element 2 – Download information** 1) Required information is correctly selected. 2) Information is downloaded in accordance with system procedures **Element 3 – Update information** 1) Information is updated according to given authority. 2) Information is keyed in accurately using a broad range of software systems. 3) Information from other documents is integrated as required. 4) Documents are saved regularly to avoid loss of data.	**UNIT VARIABLES** Information systems may include enterprise designed systems, government information system, internet. **ASSESSMENT GUIDE:***: 1) Ability to demonstrate competence and knowledge in the role of automated information system, basic keyboarding skills. 2) Knowledge of the role of automated systems for the industry. 3) Ability to access and retrieve a range of information from an automated system within enterprise acceptable timelines.

APEC SS 1.03.05.05
MONITOR AND MAINTAINED COMPUTER SYSTEM *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Monitor effectiveness of computer and related equipment 1) The effectiveness of computer equipment is maintained through on going consultations with users. 2) Effectiveness is monitored by assessment of productivity and efficiency. 3) Procedures for identifying and resolving problems are established and implemented including use of specialized assistance. 4) Training needs are identified and training opportunities provided. **Element 2 – Purchase hardware and software** 1) Hardware and software requirements are accurately identified and possible new approaches are researched. 2) Feasibility of acquiring of upgrading is assessed. 3) Options are evaluated against the needs of the enterprise including advantages and limitations. 4) User friendliness, system support and training are investigated. 5) External specialist assistance is sought as required. 6) Decisions are made in consultation with appropriate colleagues. 7) Introduction of new computer system is planned to take account of impacts on colleagues and customers. 8) Staff are adequately trained in using the new system. 9) New systems are monitored for efficiency and action taken accordingly. **Element 3 – Maintain computer equipment and system** 1) Systems for cleaning and minor maintenance are established in accordance with manufacturer's instructions. 2) Faults are reported to the nominated person / supplier for rectification. 3) Procedures for ensuring security of data is established, including back ups and virus checks. 4) Document filing systems and procedures are created to reflect the size, nature and complexity of the workplace. 5) Equipment is set up to accept software and functions being used.	**UNIT VARIABLES** Computer equipment may include screens, hard & flash drive, diskettes, printers, scanners, back up system, software. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in sources of information and advice on computer systems, computer security and filing system, key factors in achieving productivity and efficiency from computer system, current technology options as appropriate to enterprise.

APEC SS 1.03.06.05 / APEC SS 3.03.xx.05
OPERATE A COMPUTERIZED RESERVATION SYSTEM *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Access and use CRS information 1) CRS displays are accurately and correctly accessed and interpreted. 2) CRS features are used to access a range of information including: a. costs; b. availability; c. product information; d. product rules; e.	**UNIT VARIABLES** CRS may use any available CRS **ASSESSMENT GUIDE***: 1) Ability to

general industry information.	demonstrate competence and knowledge in the role of CRS, the range and services offered by CRS, basic keyboarding skills. 2) Look for ability to correctly use the features of a CRS. 3) Look for the ability to accurately make and process reservations by CRS.
Element 2 – Process CRS status	
1) New reservations or changes are accurately entered in accordance with system procedures. 2) All required details are accurately recorded. 3) Reservation status is accurately updated, amended and stored as required. 4) Where required reservation details are correctly downloaded/printed.	
Element 3 - Send and receive CRS Communications	
1) Communications to industry colleagues are accurately created and processed in the CRS. 2) Communications from industry colleagues are accessed at the appropriate time and correctly interpreted.	

APEC SS 1.03.07.05 / APEC SS 3.03.xx.05
MAINTAIN PRODUCT INFORMATION INVENTORY*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain and interpret information for inventory	**UNIT VARIABLES**
1) Information to be included in inventory is obtained from internal and external colleagues at the appropriate time. 2) Information is correctly interpreted and reviewed prior to entry into inventory.	Information inventory may include general information of enterprise products, company sales & marketing systems, rates / costs / tariffs,
Element 2 – Enter data into inventory system	Terms and conditions of sales, special packages, sales data.
1) Where appropriate information is accurately calculated prior to entry in accordance with enterprise procedures and commercial agreements or recheck with the person nominated for price calculation. 2) Information is correctly formatted and entered into the inventory system in accordance with enterprise procedures and commercial agreements.	
Element 3 – Update inventory	**ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in the role of product inventories for the company and inventory procedures and systems available. 2) Ability to accurately create, update and produce reports on a product inventory system within acceptable timeframes.
1) Inventory information is accurately updated at designated times in accordance with enterprise procedures. 2) Bookings / allotments / requests are monitored. 3) Out-of-date information is removed from the inventory within designated timelines.	
Element 4 – Provide inventory information	
1) Inventory information, updates and briefings are accurately produced within designated timelines. 2) Reports and inventory information are distributed to appropriate colleagues in accordance with enterprise procedures. 3) Assistance to inventory-related matters is provided to colleagues.	

APEC SS 1.03.08.05 / APEC SS 1.02.xx.05
PLAN AND ESTABLISH SYSTEMS AND PROCEDURES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Plan systems and procedures	**UNIT VARIABLES**
1) System and procedural requirements are identified and clarified through workplace monitoring and on-going consultations with colleagues and customers. System and procedures may include: a. customer service procedures; b. FB service procedures; c. kitchen systems; d. housekeeping systems; e. office administration procedures; f. reservation procedures; g. tour operations; h. any other procedures. 2) Problem areas are identified and prompt action is taken. 3) Possible responses are identified and developed in consultation with colleagues. 4) Responses take account of immediate operational needs and enterprise goals. 5) Human and financial issues are taken into consideration.	Systems and procedures include all general and departmental standard operating procedures.
Element 2 – Establish systems and procedures	**ASSESSMENT GUIDE***: 1) Ability to demonstrate skills and knowledge in basic principles of planning; in-depth knowledge of the specific work area operation; related legislative framework. 2) ability to identify issues that may arise in the development and implementation process.
1) Advance notice of new systems and procedures is provided to colleagues. 2) System and procedures are introduced to the workplace in a manner which causes minimum disruption to customers and colleagues. 3) Training and support is provided as required.	
Element 3 - Review systems and procedures	
1) Efficiency and effectiveness of the new system is monitored in the operation. 2) Suggestions for improvements are sought from colleagues at all levels. 3) Adjustments are promptly made.	

APEC SS 1.03.09.05 / APEC SS 4.02.xx.05
ACCESS AND INTERPRET PRODUCT INFORMATION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify and access product information	**UNIT VARIABLES**
1) Sources of product information are correctly identified and	Product information system may be manual or automated.

accessed. 2) Appropriate sources are selected according to with enterprise policy, commercial agreements and specific needs.	Sources of product information may include: brochures, timetables, computer data, tariff sheets, confidential tariff, etc.
Element 2 – Interpret product information	Products may include: transportation, touring products, cruises, accommodation, attractions, special events, recreational activities, convention / conference facilities, FF and catering facilities, currency and banking service, etc.
1) Information sources are correctly interpreted and applied including timetables, brochures, etc. 2) Specific product information is correctly interpreted and applied including: costs / tariffs / rates; conditions and rules; scheduling information; product codes; booking procedures.	
	ASSESSMENT GUIDE
Element 3 – Provide product advice	1) Evidence should include demonstrated knowledge and ability in: a. accessing and correctly interpreting information on different categories of tourism products within enterprise acceptable timeframes; b. knowledge of product terminology and procedures as appropriate to the enterprise.
1) Product advice and information needs are accurately identified. 2) Current and accurate product advice and information are provided in a timely manner. 3) Scope and depth of the information are appropriate to customer needs. 4) Information and advice are presented in an appropriate format and style.	2) Underpinning knowledge and skills required include: a. major categories of tourism products; b. industry terminology and common abbreviations in relation to major product categories; c. general procedures and specific legal issues in relation to major product categories.

APEC SS 1.03.10.05 / APEC SS 4.02.xx.05

SOURCE AND PROVIDE DESTINATION INFORMATION AND ADVICE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop destination knowledge	**UNIT VARIABLES**
1) Information sources for current and accurate information are correctly identified and accessed. 2) Information on features of the destination and the general style of tourism products available is obtained. 3) Information to meet different customer needs is accurately identified and obtained. 4) Information is recorded and stored for future use according to enterprise systems.	The range of destination knowledge will vary according to the industry sector and workplace.
	Destination knowledge may include but is not limited to: major tourist areas; geographic features; history; local economy; local custom; special regional features; cultural elements; special features of the host community such as festivals, holidays, cultural events; appropriate health and safety considerations; climate and seasonal factors; local facilities including transport, accommodation, eating out; banking and currency information; etc.
Element 2 – Update destination knowledge	
1) Informal and formal research are used to update destination and general product knowledge. 2) Feedback on experience with destinations is sought from colleagues and customers and shared with other organizations where appropriate. 3) Updated information is shared with colleagues according to enterprise procedures.	General product information may include styles of product available within the destination and seasonal availability of product.
	Informal and formal research may include: discussions with colleagues and customers; formal study; reading of brochures; trade and general media; product updates and launches; promotional seminars; direct contact with other organizations; familiarizations; reading of travel guide books; accessing the internet; video; etc.
Element 3 – Provide destination information and advice to customers	**ASSESSMENT GUIDE**
1) Information and advice needs are accurately identified. 2) A range of current and accurate destination and general product information and advice is provided in a timely manner in accordance with organization procedures. 3) Scope and depth of the information are appropriate to customer needs. 4) Information and advice are presented in an appropriate format and style.	1) Evidence should include demonstrated ability to: a. research current, relevant and accurate information on tourism destinations and the styles of product offered in those destinations; b. knowledge of current industry information networks and sources; c. present accurate and current information in simple and friendly format.
	2) Underpinning knowledge and skills required include: a. sources of information on destinations; b. knowledge of industry information networks; c. typical ways that individuals update their knowledge in the tourism industry; d. understanding of ways in which customers seek information.

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

<table>
<tr><td colspan="4" align="center">CHAPTER I.04 - ENGLISH LANGUAGE UNITS (9 Units)</td></tr>
</table>

Unit code	Unit Name	Elmts	Total PC
1.04.01.05	Speak and understand English at basic operational level	6	8+6+8+10+10+4 = 46
1.04.02.05	Read English at basic operational level	3	5+3+4 = 12
1.04.03.05	Write English at basic operational level	5	8+10+10+6+7 = 41
1.04.04.05	Speak and understand English at supervisory operational level	10	11+6+9+7+7+7+9+8+7+5 = 76
1.04.05.05	Read English at supervisory operational level	3	6+5+6 = 17
1.04.06.05	Write English at supervisory operational level	4	8+15+9+8 = 40
1.04.07.05	Speak and understand English at advance operational level	6	5+10+9+7+8+6 = 45
1.04.08.05	Read English at advance operational level	2	8+8 = 16
1.04.09.05	Write English at advance operational level	4	13+16+7+7 = 43
	TOTAL 09 Units	43	336

APEC SKILL STANDARD UNITS CHAPTER 1.04 - DETAILED DESCRIPTION OF UNITS

APEC SS 1.04.01.05
SPEAK AND UNDERSTAND ENGSLISH AT BASIC OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Exchange information in familiar topics 1) Initiate an exchange using appropriate greetings. 2) Provide and request information on familiar topics. 3) Manage conversational techniques, such as, asking for repetition, checking for comprehension and clarification. 4) Participate in a short exchange which involves a one to one interaction. 5) Speak with pronunciation, stress and intonation which require clarification from time to time. 6) Use vocabulary which covers familiar topics. 7) Use simple grammatical constructions to give explanations, to ask simple questions and to manage basic conversational techniques. 8) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 2 – Give basic instructions in English** 1) Give a series of simple instructions correctly. 2) Link the instructions sequentially using linking words such as, first, second, third, finally. 3) Speak with pronunciation, stress and intonation which require clarification from time to time. 4) Use vocabulary which covers familiar topics. 5) Use simple grammatical constructions to give instructions. 6) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 3 – Initiate and participate in short casual conversations** 1) Initiate a formal or informal exchange using appropriate greetings. 2) Express personal view on familiar topics. 3) Relate an event in the correct time sequence. 4) Manage some conversational techniques, feedback and clarification. 5) Use vocabulary describing familiar topics appropriately. 6). Speak with pronunciation, stress and intonation which requires clarification from time to time. 7) Use appropriate grammatical constructions to convey simple meanings in casual conversation. 8) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 4 – Promote goods and services to customer in English** 1) Greet customer appropriately. 2) Elicit from customer the nature of his/her requirements using simple questions. 3) Describe products to customer using demonstration techniques. 4) Promote the qualities of the products or services by using simple persuasive language. 5) Provide additional information regarding the goods and services to the customer on request. 6) Close the exchange with customer appropriately. 7) Speak with pronunciation, stress and intonation which require clarification from time to time. 8) Use vocabulary which covers goods and services appropriate for the job, enterprise and location. 9) Use simple grammatical constructions to promote goods and services such as, use of comparatives, superlatives and descriptive language. 10) Use appropriate level of formality depending on the relationship with the speakers. **Element 5 – Speak on the telephone** 1) Give correct greeting which includes the name of the company. 2) Offer assistance to the caller. 3) Establish the purpose of the call and the name of the person whom the caller wishes to speak to. 4) Ask the caller to wait while the relevant person is located if possible. 5) Apologize to the caller if the person is unavailable. 6) Record the caller's details. 7) Use vocabulary which covers familiar topics. 8) Speak with pronunciation, stress and intonation which require clarification from time to time. 9) Use simple grammatical constructions to convey meaning. 10) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 6 – Understand basic spoken English** 1) Demonstrate understanding of purpose of oral text. 2) Listen for general meaning in the oral text. 3) Listen for specific details. 4) Demonstrate understanding of oral text.	**UNIT VARIABLES** Exchange of conversation may include: 1) Respond to basic customer requests. 2) Give directions to customers. 3) Provide information on facilities, destination and money changer. 4) Face-to-face conversation. 5) Telephone exchange. 6) Explain simple procedures. 7) Promote products, services and merchandise available. 8) Simple instruction. 9) Request for information. 10) Casual conversation where native speaker slows down speed of speaking and use simple vocabulary. **Equivalent to TOEIC 500 – 650 or Australian Second Language Proficiency Ratings Level 1+** **ASSESSMENT GUIDE*** 1) Appropriate communications techniques such as taking turns, clarification, feed back. 2) Ability to distinguish social relationship in spoken interactions. 3) Ability to use appropriate vocabulary for familiar topics. 4) Ability to identify key information from oral text.

APEC SS 1.04.02.05
READ ENGLISH AT BASIC OPERATIONAL LEVEL

UNIT ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Read simple diagrammatic business text 1) Identify the purpose of the text. 2) Identify common signs. 3) Access specific information from map including the legend. 4) Locate information in a table. 5)	**UNIT VARIABLES** Text read may include: 1) Maps, brochures, basic business letters, simple messages. 2) Simple flow chart for a process. 3)

Demonstrate understanding of a simple flow chart.	Simple written instructions from customers. 4) Basic operating procedures. 5) A mixture of sentence structures. 6) Everyday familiar vocabulary. 7) Headings and sub headings.
Element 2 – Read simple informational business texts	
1) Identify the purpose of the text. 2) Identify the main ideas in a text. 3) Demonstrate understanding of the text.	**Equivalent to TOEIC 500 – 650 or Australian Second Language Proficiency Ratings Level 1+**
Element 3 – Read simple instructional business text	**ASSESSMENT GUIDE***
1) Identify the purpose of the text. 2) Recognize the structure of the text. 3) Identify the main ideas in a text. 4) Demonstrate understanding of a sequence of simple written instructions as described in the text.	Ability to read and interpret a limited range of simple texts

APEC SS 1.04.03.05
WRITE ENGLISH AT BASIC OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Write short messages 1) Identify the audience and purpose of the text. 2) Use language appropriate to text purpose and format. 3) Sequence idea properly. 4) Write a minimum of six simple sentences about the topic. 5) Use legible handwriting or appropriate computer format. 6) Use appropriate level of formality for the text to be understood. 7) Spell and punctuate sufficiently for the text to be understood. 8) Use grammar correctly for the meaning of the text to be understood. **Element 2 – Write short basic business report** 1) Identify the audience and purpose of the text. 2) Use language appropriate to text purpose and format. 3) Sequence idea properly. 4) Link ideas effectively using appropriate linking words. 5) Stage the report correctly with appropriate middle and end. 6) Write a text of approximately 150 words. 7) Use appropriate level of formality. 8) Use legible handwriting or appropriate computer format. 9) Spell and punctuate sufficiently for the text to be understood. 10) Use grammar correctly for the meaning of the text to be understood. **Element 3 – Complete forms in English** 1) Identify the audience and purpose of the text. 2) Use language appropriate to text purpose and format. 3) Identify the information required. 4) Respond correctly to written instructions. 5) Provide information in appropriate place and form. 6) Provide information in a telephone message form to include the following information: a. caller's name; b. caller's company; c. date and time of calling; d. brief message from the caller expressed in simple sentences. 7) Use appropriate key vocabulary. 8) Use legible handwriting or appropriate computer format. 9) Spell and punctuate sufficiently for the text to be understood. 10) Use grammar correctly for the meaning of the text to be understood. **Element 4 – Write simple instructions in English** 1) Identify the audience and purpose of the text. 2) Use language appropriate for the purpose e.g. simple instructional terms. 3) Sequence instructions correctly and use a numbering system to order the instructions. 4) Use legible handwriting or appropriate computer format. 5) Spell and punctuate sufficiently for the text to be understood. 6) Use grammar correctly for the meaning of the text to be understood. **Element 5 – Write to request, confirm or clarify an action** 1) Identify the audience and purpose of the text. 2) Use language and tone appropriate to text purpose and audience. 3) Sequence and structure ideas or information correctly. 4) Write at least one paragraph. 5) Use appropriate level of formality for the text to be understood. 6) Spell and punctuate sufficiently for the text to be understood. 7) Use grammar correctly for the meaning of the text to be understood.	**UNIT VARIABLES** Text written may include : 1. Simple accident report forms. 2) Travel itinerary. 3) Short accident report. 4) Report on machine failure. 5) Report on tour or event / banquet. 6) Directions for tourists / guests. 7) Simple event program or simple travel schedule. 8) Fax text for clarification, confirmation on reservations. 9) Simple interoffice memo. 10) Simple letter of complaint. **Equivalent to TOEIC 500 – 650 or Australian Second Language Proficiency Ratings Level 1+** **ASSESSMENT GUIDE:*** Ability to write clearly and comprehensively to convey meaning for the specified range of language uses.

APEC SS 1.04.04.05
SPEAK AND UNDERSTAND ENGLISH AT SUPERVISORY AND SENIOR OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Respond to incoming telephone inquiries 1) Give correct greeting which includes the name of the company and person. 2) Offer assistance to the caller. 3) Establish the purpose of the call clearly by asking questions. 4) Provide information to address the customer's inquiry. 5) Transfer caller inquiries promptly to relevant person. 6) Record caller's details and brief message if applicable. 7) Confirm message with caller. 8) Close the conversation appropriately. 9) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 10) Use appropriate grammatical constructions to convey meaning. 11) Use appropriate level of formality or informality depending on the	**UNIT VARIABLES** Conversation capability for attending and participate in meetings, either face to face or on the phone, giving clear and extensive information on various topics and issues, giving clear and extensive

relationship with the speaker.

Element 2 – Request goods and services on the telephone

1) Establish the purpose of the call prior to calling. 2) Identify and use appropriate steps to achieve the transaction, including: a. Identification of the service/goods required; b. Request the services or goods required; c. Confirm that the appropriate services or goods are being provided by using clarification techniques. 3) Close the conversation appropriately. 4) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 5) Use appropriate grammatical constructions to convey meaning. 6) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 3 – Participate in group discussions

1) Observe meeting procedures and protocols. 2) Answer questions pertinent to the topic under discussion. 3) Give opinions pertinent to the topic under discussion. 4) Participate in meetings by using strategies to confirm, clarify understanding and to make constructive additions to what is said. 5) Use turn taking skills to influence the direction of the meeting and to contribute to the achievement of the agreed goals of the meeting. 6) Provide regular support and feedback to participants. 7) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 8) Use appropriate grammatical constructions to convey meaning. 9) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 4 – Participate in casual conversation to establish customer report

1) Open and close casual conversations appropriately. 2) Express opinions on a variety of topics such as current events using appropriate vocabulary and complex language structures. 3) Relate familiar events and anecdotes using familiar words and types of language that feature in casual conversation. 4) Use clarification and turn taking techniques. 5) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 6) Use appropriate grammatical constructions to convey meaning. 7) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 5 – Provide detailed information to customers

1) Initiate an exchange using appropriate greetings. 2) Provide detailed oral information in response to customer's request. 3) Use clarification and feedback techniques to ensure that the request for information has been adequately addressed. 4) Refer the customer to further sources of information if appropriate. 5) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 6) Use appropriate grammatical constructions to convey meaning. 7) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 6 – Give complex instructions

1) Use a variety of language to express a series of instructions. 2) Stage the process of giving the instructions sequentially. 3) Clarify that instructions have been correctly understood. 4) Provide feedback to listener on the successful performance of activity when applicable. 5) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 6) Use appropriate grammatical constructions to convey meaning. 7) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 7 – Deal with customer complaints

1) Use formal greetings and courtesy expressions to greet customer. 2) Use clarification and feedback techniques as the customer explains the complaint. 3) Demonstrate understanding of the nature of the complaint by rephrasing what the customer has stated. 4) Offer to take appropriate action to resolve the complaint. 5) Explain circumstances which give rise to the complaint when possible. 6) Offer possible solutions. 7) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 8) Use appropriate grammatical constructions to convey meaning. 9) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 8 – Promote products and services to customer

1) Greet customer appropriately and offer assistance. 2) Request information from customer regarding his/her requirements. 3) Use confirmation and clarification techniques to ensure correct interpretation of customer requirements. 4) Describe and promote the various product and services to the customer. 5) Close the exchange appropriately. 6) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 7) Use appropriate grammatical constructions to convey meaning. 8) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 9 – Provide brief business presentation

1. Research topic using references (books, publications, newspapers, or internet). 2). Provide plan of the structure of the presentation including the staging of the presentation. 3) Deliver a logical presentation which has defined introduction, development and conclusion for about 10 minutes duration. 4) Use presentation techniques to enhance the presentation, including: a. humor; b. body language; c. anecdotes; d. appropriate answer to questions; e. strategies to encourage audience participation such as games etc. 5) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 6) Use appropriate grammatical constructions to convey meaning. 7) Use appropriate level of formality or informality depending on the relationship with the speaker.

Element 10 – Understand spoken English in routine work situations

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information on enterprise product and services including rates and prices, dealing with customer complaints either face to face or in the phone, giving presentations and commentaries, and conduct sales promotions.

TOEIC 651 – 850 or Australian Second Language Proficiency Ratings, Level 2

ASSESSMENT GUIDE*
1) Ability to use and respond to spoken language in a variety of contexts with a degree of flexibility. 2) Ability to extract main ideas and most details from sustained oral texts.

| 1) Demonstrate understanding of purpose of oral text. 2) Listen for general meaning in the oral text. 3) Recognize indicators which introduce a topic and distinguish main points from details. 4) Listen for specific details. 5) Demonstrate understanding of how information is linked in a text. | |

APEC SS 1.04.05.05
READ ENGLISH AT SUPERVISORY AND SENIOR OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Read routine diagrammatic business text 1. Identify the purpose of the text. 2) Access specific information from a map or diagram. 3) Access information related to directionality in a diagram. 4) Access statistical information from pie charts, line graphs, bar charts, block graphs. 5) Locate information in flow charts. 6) Demonstrate a comprehensive understanding of the text. **Element 2 – Read routine informational business text** 1. Identify the purpose of the text. 2) Extract the main idea from the text. 3) Extract specific details from the text. 4) Infer meaning from text. 5) Demonstrate comprehensive understanding of the text. **Element 3 – Read routine explanatory or instructional business text** 1. Identify the purpose of the text. 2) Interpret a series of complex instructions. 3) Extract the main idea from the text. 4) Extract specific details from the text. 5) Infer meaning from text. 6) Demonstrate comprehensive understanding of the text.	**UNIT VARIABLES** Routine business reading text may include maps, flow charts for process, statistical information, schedules, tables of information, promotional fares & rates, events programs and information, training manuals, HSS regulations, customs procedures, insurance regulations and procedures, SOP, complex sentence structures and constructions, broad range of vocabulary and technical terms, complex diagrams and graphical information, etc. **TOEIC 651 – 850 or Australian Second Language Proficiency Ratings, Level 2** **ASSESSMENT GUIDE***: Ability to read and interpret a range of business texts

APEC SS 1.04.06.05
WRITE ENGLISH AT SUPERVISORY AND SENIOR OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Write routine business instructional texts 1) Identify the purpose and audience of writing text. 2) Define the goal of writing the text. 3) Identify the materials required for task if required. 4) Write a sequence of sentences that follow a logical order related to the carrying out of a specific task. 5) Indicate sequence of steps using numerical number. 6) Use a broad range of vocabulary including technical vocabulary to suit the writing purpose. 7) Spell and punctuate correctly. 8) Use appropriate grammatical constructions. **Element 2 – Write routine business correspondence** 1) Identify the purpose and audience of writing text. 2) Use appropriate referencing. 3) Use formal opening. 4) Indicate purpose of writing. 5) Explain the issue. 6) Clarify action required. 7) Use formal close in the letters. 8) Sequence and structure information and ideas logically to suit purpose. 9) Use appropriate sentence constructions both simple and complex to convey meaning. 10) Use appropriate paragraphing where appropriate. 11) Use appropriate links between sequences of sentences and paragraphs to convey relationship between events. 12). Use a variety of writing formats including faxes and memos. 13) Use appropriate levels of formality in business correspondence. 14) Spell and punctuate correctly. 15) Use appropriate grammatical constructions. **Element 3 – Write short business reports** 1) Identify the purpose and audience of writing text. 2) Sequence and structure information and ideas logically to suit purpose. 3) Use appropriate sentence constructions both simple and complex to convey meaning. 4) Use appropriate paragraphing where appropriate. 5) Use appropriate links between sequences of sentences and paragraphs to convey relationship between events. 6) Convey objectives information about features or events. 7) Write a report of about 400 words. 8) Use standard punctuation and spelling. 9) Use appropriate grammatical constructions. **Element 4 – Complete forms** 1) Identify the information required. 2) Respond correctly to written instructions. 3) Provide information in appropriate place and form. 4) Record telephone messages accurately ensuring that the following are included: a. Caller's name; b. Caller's company; c. Date and time of calling; d. A brief message. 5) Use appropriate key vocabulary. 6) Use legible handwriting. 7) Use standard punctuation and spelling. 8) Use appropriate grammatical constructions.	**UNIT VARIABLES** Texts may include training procedures, provide directions and instructions, travel itinerary documents, confirmation letters, accompanying letters for documents, quotations, sales letters, invitations, letter of complaints, letter for interviews, letters providing information on company products and services, fax/memos/emails, accident reports, marketing reports, passport forms etc. **TOEIC 651 – 850 or Australian Second Language Proficiency Ratings, Level 2** **ASSESSMENT GUIDE*** Ability to write clear, well-constructed documents that satisfy business writing requirements.

APEC SS 1.04.07.05

SPEAK AND UNDERSTAND ENGLISH AT ADVANCED OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop a program for a complex business presentation 1) Research the oral presentation topic using a range of research methods including internet, reference books & publications, industry personnel. 2) Provide a plan outlining the organization of the presentation which includes: a. time allocated for each part of the presentation; b. a statement of the objectives; c. a description of the intended audience including a breakdown of the audience requirements, details of age, gender, educational background of audience, etc; d. the channels of communication and the presentation method and style most suitable for them. 3) Provide outline of the delivery of the program which includes: a. introduction; b. outline of main ideas; c. summary; d. conclusion; e. preparation of possible questions. 4) Deliver presentation in an appropriate manner to suit the audience. 5) Use presentation techniques to enhance absorption and attention of the audience, including: a. humor, body language, anecdotes; b. answer questions properly; c. offer to provide follow up information to any questions where the answer is unknown; d. use strategies to encourage audience participation such as elicitation of information, questioning, listing of items; e. encourage feedback; f. provide self evaluation of the presentation against the stated goals; g. use appropriate pronunciation, stress and intonation to convey a range of moods and meanings; h. use simple and complex grammatical constructions with a high degree of accuracy and effectiveness; i. use appropriate level of formality. **Element 2 – Deal with customer complaints** 1) Provide information to the complaint. 2) Explain circumstances, cause and consequences of the issue. 3) Participate in complex negotiation to reconcile different points of view. 4) Propose solutions. 5) Use conflict resolution strategies to deal with possible conflict situation. 6) Use feedback, clarification techniques etc. 7). Use appropriate range of vocabulary. 8) Adjust pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 9) Use a broad range of grammatical constructions with a high degree of accuracy and effectiveness. 10) Use appropriate level of formality depending on the relationship with the speakers. **Element 3 – Use and respond to spoken English in business negotiations** 1) Describe or define the issue or problem to be discussed. 2) Explain and analyze the reasons for the issue or problem. 3) Generate possible solutions to the problem and try to come to an agreement. 4) Negotiate complex problematic spoken exchanges by bringing different types of view together. 5) Use spoken language to explore ideas in an extended discussion. 6) Use appropriate specialized vocabulary. 7) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 8) Use a broad range of grammatical constructions with a high degree of accuracy and effectiveness. 9) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 4 – Provide information and detailed explanations to customers** 1) Respond to customer inquiries comprehensively. 2) Provide a comprehensive range of information in a logical and clear manner. 3) Clarify that information has been understood. 4) Negotiate complex explanations of problems and issues. 5) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 6) Use a broad range of grammatical constructions with a high degree of accuracy and effectiveness. 7) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 5 – Promote products and services to customers** 1) Determine customer requirements by asking questions and eliciting information. 2) Use confirmation and clarification techniques to ensure correct interpretation of customer requirements. 3) Provide detailed information to the customer on available services and products. 4) Use persuasive language and techniques to encourage the customers to acquire the products or service. 5) Use a variety of language to achieve outcome. 6) Use pronunciation, stress and intonation to convey a number of emotions and to ensure intelligibility. 7) Use a broad range of grammatical constructions with a high degree of accuracy and effectiveness. 8) Use appropriate level of formality or informality depending on the relationship with the speakers. **Element 6 – Understand oral English in complex situations** 1) Demonstrate understanding of purpose of a complex oral text such as extended presentation, complex negotiations, meetings, complex seminars. 2) Identify key points and supporting information in a complex oral text. 3) Deduce meaning of unfamiliar items. 4) Infer information not explicitly stated. 5) Recognize indicators for introducing a topic or changing a topic. 6) Evaluate the contents and effectiveness of a complex oral text. 7) Make notes from information presented orally, covering key points and supporting information.	**UNIT VARIABLES** **TOEIC 801 – 990 or Australian Second Language Proficiency Ratings, Level 3** Oral communication includes sales presentation, training delivery, presentations at conferences, negotiate corporate accounts / service contracts / agency agreement / franchise agreement / venue contracts, negotiate rates, marketing agreements and business development. All above may be done face-to-face or on the phone. **ASSESSMENT GUIDE*** 1) Ability to use and respond to spoken English in sustained complex transactions. 2) Ability to extract main ideas and specific details from oral texts.

APEC SS 1.04.08.05

READ ENGLISH AT ADVANCED OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Read complex informational business text	**UNIT VARIABLES**

1) Identify the purpose of text. 2) Demonstrate understanding of the layout of the text. 3) Extract the main idea from the text. 4) Extract specific details from the text. 5) Extract information relevant to a research task. 6) Read with speed and accuracy. 7) Infer meaning from text. 8) Distinguish between information and the author's opinion.	TOEIC 801 –990 or Australian Second Language Proficiency Ratings, Level 3 Reading ability includes contracts, bids & proposals, insurance regulations, market reports, innovations, complex meeting minutes, legal documents etc.
Element 2 – Read complex instructional business text 1) Identify the purpose of text. 2) Demonstrate understanding of the layout of the text. 3) Differentiate between instruction and interpretation. 4) Identify misleading information in the text. 5) Extract the main idea from the text. 6) Extract specific details from the text. 7) Read with speed and accuracy. 8) Infer meaning from text.	**ASSESSMENT GUIDE***: Ability to read and interpret a broad range of complex business texts.

APEC SS 1.04.09.05
WRITE ENGLISH AT ADVANCED OPERATIONAL LEVEL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Write complex business reports 1) Identify the audience and purpose of the report. 2) Use neutral tone in the report. 3) Sequence and structure information logically to suit purpose. 4) Analyze the issue effectively. 5) Use headings and sub headings. 6) Use numbering system, referencing and bibliography where appropriate. 7) Use appropriate paragraph format. 8) Link paragraphs in an extended piece of writing. 9) Present a range of concepts and facts within a specialist field of knowledge, including abstract or technical concepts. 10) Evaluate the findings in the report. 11) Produce recommendations for future action. 12) Spell and punctuate correctly. 13) Use a broad range of grammatical constructions to convey meaning.	**UNIT VARIABLES** TOEIC 801 – 990 or Australian Second Language Proficiency Ratings, Level 3 Writing ability includes bids and proposals, brochures and company profile, contracts, promotional and marketing publications.
Element 2 – Write complex business correspondence 1) Identify the audience and purpose of the writing text. 2) Use appropriate business referencing. 3) Use formal opening. 4) Indicate purpose of writing. 5) Explain the issue. 6) Clarify action required. 7) Use formal closing in the letter. 8) Sequence and structure information and ideas logically to suit purpose. 9) Format the letter correctly. 10) Use appropriate sentence constructions, both simple and complex, to convey meaning. 11) Use appropriate paragraphing. 12) Use appropriate links between sequences of sentences and paragraphs to convey relationships between events. 13) Use a variety of writing formats including faxes and memos. 14) Use appropriate levels of formality in business correspondence. 15) Spell and punctuate correctly. 16) Use a broad range of grammatical constructions to convey meaning.	**ASSESSMENT GUIDE*** Ability to write clearly and well constructed materials that satisfy business writing.
Element 3 – Write effective meeting minutes 1) Identify the audience and purpose of the writing text. 2) Use appropriate format for the minutes. 3) Include date and location or meeting and a list of the meeting participants. 4) Acknowledge meeting participant contributions. 5) Identify and record the main recommendations from the meeting. 6) Spell and punctuate correctly. 7) Use a broad range of grammatical constructions to convey meaning.	
Element 4 – Write complex business writing texts 1) Use appropriate language and tone to the audience. 2) Sequence and structure information and ideas logically to suit purpose. 3) Format the information appropriately including headings and sub-headings. 4) Present a range of concepts and facts within a specialist field of knowledge, including abstract concepts. 5) Present information accurately, clearly and concisely. 6) Spell and punctuate correctly. 7) Use a broad range of grammatical constructions to convey meaning.	

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER I.05 - ENVIRONMENT & COMMUNITY INTEGRATION UNITS (10 UNITS)

Unit code	Unit Name	Elmts	Total PC
1.05.01.05	Implement sustainable horticultural practices	5	4+3+3+6+2 = 18
1.05.02.05	Collect refuse and recyclables	2	4+2 = 6
1.05.03.05	Plan, develop and monitor ecologically sustainable operations (idem 4.07.06.05)	3	7+6+2 = 15
1.05.04.05	Plan and implement minimal impact operations (idem 4.04.07.05 / 4.07.XX.05)	3	3+3+3 = 9
1.05.05.05	Research and share general information on local ethnic cultures	2	6+5 = 11
1.05.06.05	Interpret aspects of local ethnic cultures (idem 4.04.xx.05)	2	2+8 = 10
1.05.07.05	Plan and develop culturally appropriate tourism operations (idem 4.07.10.05)	3	7+10+3 = 20
1.05.08.05	Develop host community awareness tourism (idem 4.07.07.05)	2	3+4 = 7
1.05.09.05	Assess industrial opportunities for local communities (idem 4.07.08.05)	5	4+4+3+3+3 = 17
1.05.10.05	Develop interpretive content for ecotourism activities (idem 4.07.11.05)	2	2+5 = 7
TOTAL	10 UNITS	29	120

APEC SKILL STANDARD UNITS CHAPTER 1.05 - DETAILED DESCRIPTION OF UNITS

APEC SS 1.05.01.05
IMPLEMENT SUSTAINABLE HORTICULTURAL PRACTICES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDELINE
Element 1 – Prepare and Implement strategies 1) Financial resources are identified and allocated for environmental management within the enterprise. 2) Environmental management strategies are developed using available resources and according to management policies and legislative requirements. 3) Strategies are assessed for their effectiveness in reducing waste disposal from the enterprise according to management policies and sound environmental management practices. 4) Changes to environmental management strategies are implemented to take advantage of newly available technologies and to ensure on-going waste reduction and energy and water efficiency. **Element 2 – Minimize waste** 1) Materials and consumables obtained by the enterprise from recycled or re-usable materials, where appropriate. 2) Materials and consumables are obtained in amount that results in packaging and waste reduction. 3) Composting, shredding, re-using and recycling are used as and when appropriate, according to enterprise guidelines. **Element 3 – Conserve energy resources** 1) Machinery is operated and used efficiently, reducing fuel usage and emissions or discharges. 2) Energy used for heating, lighting and operation of remote appliances, is efficient and uses alternative sources where appropriate to the use and to management practices. 3) Design of buildings and structures takes into consideration the use of passive energy for lighting, heating, and shelter, where possible, and is in line with management policies. **Element 4 – Manage water use** 1) Water is sourced from locations other than mains water, where possible and where appropriate for its use according to management policies and legislative guidelines. 2) Run-off water is managed to optimize its use and minimize pollutants entering river and drainage systems, where appropriate and sound environmental management practice. 3) Retarding basins are planned for where possible and used appropriately according to management policies. 4) Watering strategies are developed to minimize evaporation, run-off and inaccurate delivery of water according to management policies and sound environmental management practices. 5) Contamination of water run-off with chemicals is minimized through sound watering strategies. **Element 5 – Undertake an environmental audit** 1) Environmental audit takes into consideration relevant factors topography, water use, current policies and practices, waste emissions and materials, energy use, noise control, characteristics of area and legal obligation. 2) A report is prepared according to industry practice and management requirements.	**UNIT VARIABLES** Energy sources may include: wind generators, solar generators, solar tubing, water generators, air-flow. Appropriate bodies for consultation may include: statutory bodies, council, consultants, government. Characteristics of area may include: climate, heritage, geology, ambience, vegetation. Elements for inclusion in buildings and structures may include: self-composting toilets, windbreaks, location and construction of windows, building materials, orientation of building structure, use of color, cavity sizes. Waste types may include: paper, plastics, metals, green waste, chemicals, glass, construction waste, human wastes. Water waste management systems may include: self composting toilets, septic tanks, sewerage lagoons. Legal obligations may include: government regulations, by-laws, body corporate agreements, title restrictions. Emissions and discharges may include: noise, light, odor, gas, smoke, vapor, liquids and solids, particulates, fumes. Run-off may be from: watering, irrigation systems, rain, storm water, inefficient or defective drains, cooling systems. **ASSESSMENT GUIDE***: 1) Knowledge of energy flows & food webs, nutrient cycling, noise control principles of sustainable agricultural systems, principles of composting and waste management, environmental control standards, government or other adopted environmental requirements, soil testing processes, procedures & results interpretation, pesticide and herbicide resistance. 2) Ability to prepare & implement strategies, minimizing waste, conserving energy resources, manage water use, undertake an environmental audit. 3) Knowledge of available technology, relative qualities of different energy sources, effects of pollutant in water systems, legal obligations.

APEC SS 1.05.02.05
COLLECT REFUSE AND RECYCLABLES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDELINE
Element 1 – Collect, dispose of waste or recyclable materials 1) Waste is collected from property, litter bins and designated areas in accordance with OHSS regulations and organization procedures. 2) Equipment is operated in accordance with manufacturer specifications, statutory requirements and in accordance with organization procedures. 3) Problems in the collection of waste or recyclable materials are reported to the appropriate person. 4) Disposal of waste is carried out in accordance with statutory/OHSS regulations and organization procedures. **Element 2 – Identify, select and sort recyclable materials**	**UNIT VARIABLES** Collection varies according to: bin type, location, climate, weather, waste type, type of equipment, special instructions, waste traffic volume, organization policy and procedures. Equipment may include: broom, compactor, trolley, vehicle, bins, processing equipment. **ASSESSMENT GUIDE***: 1) Demonstrate competence and knowledge in organization policies & procedures, standards of hygiene & cleanliness, hazardous materials, OHSS, teamwork, cleaning processes, hand tools, manual handling techniques, ascertaining weight and overflow of bins,

1) Recyclable materials are correctly identified and sorted in accordance with manufacturer's specification and statutory requirements.	recycling options / opportunities. 2) Ability to follow correct procedures, consider clients/guests while performing related tasks, site cleared of litter and made tidy, maximizing recycle options / opportunities.

APEC SS 1.05.03.05 / APEC SS 4.07.06.05
PLAN, DEVELOP AND MONITOR ECOLOGICALLY SUSTAINABLE OPERATIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDELINE
Element 1 – Plan for ecologically sustainable operation 1) Relationship between the industry and the environment are considered as part of the planning process. 2) Strategies to balance ecologically sustainability and economic viability are developed as part of the planning process. 3) The need for a return (economic or social) to the local community is considered. 4) Site evaluations are conducted prior to the decision to commence the operation. 5) Methods of managing tourism impacts and protecting vulnerable sites are investigated and incorporated into the planning process. 6) All stakeholders are consulted and their views incorporated into the planning process. 7) Development of decisions take account of all information made available by the planning process. **Element 2 – Develop and implement ecologically sustainable operations** 1) Environmental standards are established for the operation. 2) Codes of practice are developed for customers and colleagues. 3) Environmental best practice is regularly incorporated into operations. 4) Operations are conducted according to ecologically sustainable practices. 5) Operations are conducted in accordance with ecotourism codes of practice. 6) Environmental awareness is promoted within the tourism industry and to customers. **Element 3 – Monitor environmental impacts of operations** 1) Environmental impacts are monitored, assessed and followed up with appropriate action. 2) Courses of action are developed and implemented to limit negative impacts and damage.	**UNIT VARIABLES** Methods of managing tourism impacts may include: limits of acceptable change, zoning of the operation & activity, exclusion of activities & events, community consultation & involvement, government development plans, scheduling of activities & events, consideration of optimal weather/season conditions, selection of most appropriate transport modes, education of all stakeholders, and size of operation. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and skills in general knowledge of global environment issues, local environmental and cultural issues, ecological codes of practice, impacts of activities, minimal impact techniques, environmental management strategies, tourism trends and developments, relevant national, regional, provincial and local regulations. 2) Ability to integrate ecologically sustainable practices into overall product development process.

APEC SS 1.05.04.05 / APEC SS 4.04.xx.05
PLAN AND IMPLEMENT MINIMAL IMPACT OPERATIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan environmentally responsible activities 1) Experiences and activities are developed according to ecological codes of practice, including: a. combination of education and interpretation on the natural environment; b. environmental sustainability; c. return to the local environment and community; d. cultural sensitivity; e. meeting of realistic client expectation. 2) Operation and procedures are developed to limit potential negative impacts and maximize positive impacts on the natural environment. 3) Operation and procedures are developed to limit potential negative impacts and maximize positive impacts on the local community. **Element 2 – Conduct activities with minimal impact** 1) Minimal impact procedures are selected and used as appropriate to the area including: waste disposal, use of tracks, energy used, noise, souvenirs given, setting of camps, interactions with wild life, group size, activity specific guidelines, local customs and courtesies. 2) Customers are advised about acceptable behaviors in: environments & communities. 3) Individual behavior provides a role model for customers and colleagues in relation to minimal impact. **Element 3 – Monitor impact and changes** 1) Changes in the environment are accurately monitored and recorded. 2) Where appropriate environmental information is collected on behalf of environmental/social agencies and authorities. 3) Appropriate authorities are	**UNIT VARIABLES** Minimal impact techniques and procedures may include: education on appropriate behavioral patterns, site hardening, technological solutions, education, restricting or limiting access, staged authenticity. Environmental impact may include: 1) Positive: Opportunities for conservation / protection / rejuvenation, education of visitors & locals, improvement of sites already impacted. 2) Negative: disturbance of flora & fauna, physical damage, introduction of feral & exotic species, water / noise / air pollution, waste / energy / consumable demands and issues, visual impacts. Social impact may include: 1) Positive: economic benefits to local community, improved local facilities & amenities, employment, diversify the economy, visitor education on how the local community lives and works. 2) Negative: trivialization of culture, effect on social cultures, disruption to lifestyle, competition on use of infra structure, disturbance to indigenous people. Methods of information collection may include: logbooks, sighting forms, basic measurements on temperature / weather condition / estimations of % cover / water, photography. Changes in the natural environment may include: breeding events, erosion, species sighting, changes to flora & fauna. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and skills in: basic general knowledge of global environment issues, local environmental and cultural issues, basic general knowledge of environmental ethics, relevant government and local regulations & by-laws, minimal impact techniques, environmental information collection techniques, ecological codes of practice, an understanding of the biophysical and social cultural elements in an environment. 2) Knowledge of environmental and socio cultural impacts and issues associated with organization activities. 3) Ability to apply knowledge to the planning and operation of organization

advised on environmental social change.	activities.

APEC SS 1.05.05.05 / APEC SS 4.04.xx.05 / APEC SS 4.05.xx.05
RESEARCH AND SHARE GENERAL INFORMATION ON LOCAL ETHNIC CULTURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Research and collect general information ethnic societies 1) Sources of information about ethnic societies are correctly identified. 2) Where appropriate, written sources of information are accurately interpreted and the required information is extracted and confirmed with local communities prior to use. 3) Other information sources are accessed in a culturally appropriate way. 4) Appropriate community members are contacted and guidance is sought on how information should be used in industry context. 5) When seeking information, behavior shows respect for local culture & customs and correct protocol is followed. 6) Knowledge gained is shared with work colleagues to increase cultural awareness and understanding in the organization. **Element 2 – Share information with customers** 1) All information shared with customers is accurate. 2) Information includes reference to the diversity of societies. 3) Information is shared in a manner which shows respect for local community values and customs. 4) Information is shared in a manner which enhances customer understanding of societies. 5) Customer questions are answered in a polite and friendly manner and in accordance with community wishes about what information can be shared with customers.	**UNIT VARIABLES** Research may include: talking & listening to specific ethnic people, organizing information from personal memory and experiences, watching audio media, listening to radio, reading books & media publications, internet browsing, museum research & visits, cultural seminars/event/meeting. Information may cover: historical information on ethnic cultures, traditional life and culture, contemporary indigenous life and culture, art & music, dances, special food / herbs / medicine, tools & implements, land ownership, cultural & religious sites, etc. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and skills in: methods of researching and recording information available on ethnic societies, protocols for sharing information about ethnic cultures, copyright issues, communication skills, including cross cultural skills and awareness of communication from an ethnic perspective. 2) Ability to research & share information in a culturally appropriate way. 3) Look for ability of general information on local ethnic cultures in the region. Assessment process should involve appropriate people accepted by the local communities.

APEC SS 1.05.06.05 / APEC SS 4.05.09.05
INTERPRET ASPECTS OF LOCAL ETHNIC CULTURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Consult with the local community 1) Appropriate community members are consulted about cultural activities including: a. information which can be shared; b. who can give information to whom; c. who can receive the information; d. what activities are appropriate; e. who should be involved. 2) Tourism activities are planned and conducted in accordance with the needs and wishes of the local communities. **Element 2 – Interpret aspects of local ethnic cultures for customers** 1) Cultural aspects are interpreted for customers to the level of depth which is appropriate for the guide and the practical customer. 2) Cultural interpretation takes account of any copyright and intellectual property requirements. 3) Customers are briefed on culturally appropriate behavior. 4) Customers are made aware of copyright and intellectual property issues which may affect their own future behavior. 5) Individual guide behavior during activities shows respect for local ethnic culture and value. 6) Where appropriate, traditionally and contemporary practices are shown to customers in a manner which enhances their understanding of such culture. 7) Where appropriate, local language is used correctly and shared with customers. 8) Where appropriate, customers are invited to actively participate and share in the cultural experience.	**UNIT VARIABLES** Ethnic cultures may include: art, dance, music, folklore, story telling, tools & implements, local foods & herbs, medicine. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in in-depth knowledge and understanding of local ethnic culture, protocols for sharing information about local ethnic cultures, copyright & intellectual property issues, communications skills on ethnic cultures. 2) Look for ability to provide cultural interpretation for customers in a culturally appropriate and respectful manner. 3) Assessment process must be conducted by person approved by elders of the ethnic community. 4) Assessment process should take account of the fact that knowledge and skills in this unit may be gained through general life experience.

APEC SS 1.05.07.05 (IDEM 4.04.xx.05 / 4.07.xx.05)
PLAN AND DEVELOP CULTURALLY APPROPRIATE OPERATION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan for culturally appropriate operations 1) Cultural issues are identified at the commencement of the planning process. 2) Individuals and communities are consulted in relation to cultural issues which may affect the operation. 3) Where appropriate, economic and social impacts are considered in the planning process. 4) Strategies to balance economic viability and cultural appropriateness are developed as part of the planning process. 5) Economic returns to local communities are considered. 6) Ways of	**UNIT VARIABLES** Cultural issues may include: appropriate activities, use of cultural information, access restrictions, use of appropriate staff, traditional / contemporary values and customs, cultural differences in styles of negotiation and

managing and minimizing negative impacts and maximizing positive impacts are investigated and developed as part of the planning process. 7) Product development decisions take account of all information made available by the planning process including the need for culturally appropriate operations.

Element 2 – Develop & implement culturally appropriate operations

1) Codes of practice and procedures which show respect for cultural values are developed for customers and colleagues. 2) Operations are conducted in accordance with codes of practice. 3) Operational participation of individuals from the appropriate cultures is encouraged. 4) All activities are culturally appropriate. 5) Information shared with customers is culturally appropriate, accurate and avoids cultural stereotyping. 6) Copyright & intellectual property issues are considered. 7) Colleagues are educated about other cultures and societies. 8) Culturally appropriate behaviors are encouraged through training and education. 9) The need for culturally appropriate behavior is promoted throughout the organization and with customers. 10) Where appropriate, promotional and other materials are used to inform colleagues and customers about cultural issues.

Element 3 – Monitor operations

1) The SOP is regularly monitored to ensure culturally appropriate practices are maintained. 2) Regular consultation is conducted with individuals and local communities as appropriate. 3) Issues are dealt with promptly and changes are considered to continually improve organization practices.

communications.

Impacts on communities may include: 1) Positive: economic benefits to local community, improved local facilities, employment opportunities, cultural benefits, visitor education, greater understanding between host and visitor cultures. 2) Negative: trivialization of culture, effect on social structures and behavior.

ASSESSMENT GUIDE*: 1) Ability to demonstrate competence and skills in cultural/social impacts of activities, Copyright & intellectual property issues, cross cultural awareness and knowledge of specific culture in question, relevant government regulations, organizing and planning. 2) Ability to integrate culturally appropriate practices into overall product development process. 3) Training or assessment process should involved persons from the relevant cultures.

APEC SS 1.05.08.05 / APEC SS 4.07.xx.05
DEVELOP HOST COMMUNITY AWARENESS OF INDUSTRIES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Educate and inform the communities 1) Objectives for the education of the local community are set in accordance with the overall goals of the organization and the community. 2) Strategies and programs are devised and implemented to maximize the opportunity to inform all sections of the community about tourism / other industries. 3) Costs and benefits of tourism / other industries are clearly communicated on an on-going basis. **Element 2 – Liaise with stakeholders** 1) The main stakeholders in the host community are identified. 2) Views and opinions of stakeholders are sought on an on-going basis in relation to tourism activities. 3) Input from stakeholders is assessed and applied in the planning and organization of tourism / industry activities. 4) Potential conflicts relating to tourism / other industries are identified and solutions sought in consultation with relevant parties.	**UNIT VARIABLES** Stakeholders may include: general public, elected officials, senior bureaucrats, community groups, private sectors operators, industry associations, trade unions, media publications. **ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in community impacts of tourism / other industries both costs and benefits, typical structures for local, provincial & national tourism / other industries, typical issues/problems in relation to host communities and tourism / other industries, strategic and tactical community communications. 2) Look for understanding the role of tourism within host communities, the impacts of industry and the role of major stakeholders. 3) Ability to develop strategies to ensure effective communication about tourism / industry issues to the broad community.

APEC SS 1.05.09.05 / APEC SS 4.07.xx.05
ASSESS INDUSTRIAL OPPORTUNITIES FOR LOCAL COMMUNITIES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Seek information about potential industry opportunities 1) The local community is consulted about the possibility of community involvement in tourism / other industries and agreement is sought to investigate the opportunities. 2) General information sources on the industry are accurately identified and accessed. 3) Information on specific relevance to the community is gathered and used to make decisions about tourism / other industries. 4) Information from other communities is obtained and used to make decisions about tourism / other industries. **Element 2 – Analyze information in relation to local communities** 1) Relevant tourism / other industries members are consulted on customer and industry expectations for tourism / other industries products and services. 2) Potential social and economic impacts on the community are identified and analyzed. 3) Current skill levels and the need for training or specialist expertise are identified and analyzed. 4) Potential conflicts between the industry and other community values are identified and analyzed. **Element 3 – Liaise with external stakeholders** 1) Contacts are established and maintained with relevant people outside the community. 2) Information and advice are exchanged with external holders. 3) Assistance is sought from external	**UNIT VARIABLES** Potential industry opportunities cover retails operations, work opportunities, related industries development, visits from external communities, training for local communities, etc. Sources of information may include: government bodies, industry associations, research bodies, reports, other local businesses, land agencies, other local communities, local people, etc. External stakeholders may include: the wider community, local businesses, government bodies and private sector associations, training agencies, etc.

individuals and organizations when required.	**ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in the relevant industry, industry network and information sources, impact of the relevant industry, research and analysis skills. 2) Look for knowledge of the range of potential issues and impacts in relation of the relevant industry development in a local community. 3) Ability to identify and analyze the full range of potential impacts of proposed relevant industry development on a particular local community.
Element 4 – Consult with the community	
1) The community is consulted about tourism / other industries potentials. 2) The community is provided with relevant, current and accurate information to facilitate informed debate and decisions. 3) Where appropriate, external individuals and organizations are invited to talk to the community.	
Element 5 – Makes decisions in relation to tourism opportunities	
1) Decisions about tourism / other industries opportunities are made within the appropriate timeframe, taking into account all information which has been gathered and analyzed. 2) Decision reflects the wishes of the community. 3) When decisions are to pursue the opportunities, information collected in the assessment process is integrated into future planning.	

APEC SS 1.05.10.05 / APEC SS 4.04.xx.05 / 4.07.XX.05
DEVELOP INTERPRETIVE CONTENT FOR ECOTOURISM ACTIVITIES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Research specialist information on ecology	**UNIT VARIABLES**
1) Research techniques are used to access current, accurate and relevant information on specialist ecological topics. 2) Subjects of potential customer interest are made the focus of research identities.	Interpretation should draw out the links between the different components of the ecosystem: national geology and physical geography, national history band human geography, fauna and flora, preservation and conservation issues, fire and water ecology, impact of human history on environment.
Element 2 – Prepare interpretive content for tourism opportunities	
1) Educational and interpretive themes and messages are identified from research and incorporated into ecotourism activities. 2) Activities are developed to include focus on the relationship between key themes and other parts of the eco-system. 3) Content is prepared according to the principles of interpretation. 4) Activities incorporate biological knowledge and ecological principles. 5) Themes and activities are generated in accordance with ecotourism codes of practice.	**ASSESSMENT GUIDE***: 1) Ability to demonstrate competence and knowledge in research skills, in-depth knowledge of specialist topics, ecotourism codes of practice, interpretation principles (see **NOTE** on right column), knowledge of environmental best practice and principles, knowledge of global and national environment issues. 2) Look for in-depth knowledge of subject area. 3) Look for ability to research and apply specialist information on activity.
NOTE: Interpretation principles from Tilden: 1) Interpretation does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile. 2) Information is not interpretation. Interpretation is revelation based upon information, but they are entirely different things. However, interpretation includes information. 3) Interpretation is an art which combines many arts, whether the materials are presented are scientific, historical or architectural. 4) The main aim of interpretation is not instruction but provocation. 5) Interpretation should aim to present a whole rather than a part, and must address itself to the whole person rather than any phase. 6) Interpretation addressed to children should not be a dilution of the presentation to adults, but should follow a fundamentally different approach.	

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.01 - CUSTOMER SERVICE, SALES & MARKETING (16 Units)

SUMMARY OF UNITS

Unit code	Unit Name	ELMTS	Total PC
2.01.01.05	Promote products and services to customers	2	7+4 = 11
2.01.02.05	Conduct presentation	2	5+9 = 14
2.01.03.05	Plan and implement sales activities	4	7+3+8+4 = 22
2.01.04.05	Coordinate marketing and promotional activities	7	4+3+3+5+3+4+4 = 26
2.01.05.05	Establish and conduct business relationships	4	3+5+3+4 = 15
2.01.06.05	Sell products and services	3	2+9+2 = 13
2.01.07.05	Manage quality customer service (idem 1.02.XX.05)	2	4+6 = 10
2.01.08.05	Coordinate the production of brochures and marketing materials	5	1+3+2+5+6 = 17
2.01.09.05	Create a promotional display / stand	4	5+2+3+3 = 13
2.01.10.05	Develop, manage and evaluate marketing strategies	4	1+5+3+3 = 12
2.01.11.05	Research Data (idem 1.02.xx.05)	3	2+4+3 = 9
2.01.12.05	Maintain product inventory (idem 3.03.xx.05)	4	2+2+3+3 = 10
2.01.13.05	Sell merchandise (idem 4.06.xx.05)	7	2+5+4+5+4+3+3 = 26
2.01.14.05	Advice on merchandise (idem 4.06.xx.05)	2	2+3 = 5
2.01.15.05	Merchandise products (idem 4.06.xx.05)	5	7+5+3+7+1 = 23
2.01.16.05	Apply Point of Sales (POS) Transactions (idem 2.02.xx.05 / 4.06.xx.05)	4	9+7+3+5 = 24
	Total 16 units	62	250

APEC SKILL STANDARD UNITS CHAPTER 2.01 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.01.01.05
PROMOTE PRODUCTS AND SERVICES TO CUSTOMERS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop products / service and market knowledge 1) Opportunities are taken to develop product / service knowledge. 2) Informal and formal research is used to update knowledge. 3) Customer feedback and workplace observation is used to evaluate products, services and promotional initiatives. 4) Knowledge obtained is shared with colleagues to enhance the sales effectiveness of the team. 5) Information gained from workplace experience and direct customer contact is passed to the appropriate person for consideration in future planning. 6) Changes in customer preferences are identified. 7) Ideas for product and service adjustments to meet customer needs are suggested to the appropriate person in accordance with enterprise policy. **Element 2 – Encourage customers to use and buy products and services** 1) Accurate information about products and services is offered to customers. 2) Selling techniques are employed to encourage usage and purchase. 3) Customers are made aware of possible extras and add-ons. 4) Products and services are promoted in accordance with current enterprise goals and promotional focus.	**UNIT VARIABLES** Formal and informal research may include discussions with colleagues, reading enterprise information, research of product and service information brochures, general media. Products and services include all products, facilities and services offered by the enterprise. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in any legal issues which impact on the sale of products and services, in-depth knowledge of enterprise products and services, selling techniques. 2) Ability to use selling techniques to promote enterprise products and services, knowledge of contexts in which this promotion may apply.

APEC SS 2.01.02.05
CONDUCT PRESENTATIONS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare for presentations 1) Presentation is planned in advance. 2) Material is researched and selected according to purpose and objectives, audience characteristics, occasion and venue. 3) Material is organized in a clear and logical manner. 4) Information presented is current, accurate and relevant. 5) Supporting materials such as slides, overheads or computer-based programs are created and organized within appropriate timeframes. **Element 2 – Conduct presentations** 1) Information is presented in a clear and concise manner. 2) Appropriate protocols are observed. 3) Recognized public speaking techniques are employed during the presentation. 4) Humor is appropriately used. 5) Visual aids and equipment are appropriately used. 6) Where audience is external the enterprise is promoted throughout the presentation. 7) Where possible the audience is involved in the presentation and feedback is encouraged. 8) Audience needs are quickly identified and any adjustments to presentation made accordingly. 9) Presentations are followed up with actions as required.	**UNIT VARIABLES** Presentations may be internal or external and may include sales presentations, training delivery, presentations within meetings, conference addresses, and staff briefings. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in presentation planning, public speaking techniques, knowledge of subject matter for the presentation. 2) Ability to apply established techniques in the preparation of the presentation. 3) Ability to deliver a logical well structured presentation that shows effective use of public speaking techniques. 4) Ability to tailor the presentation to specific audience needs.

APEC SS 2.01.03.05
PLAN AND IMPLEMENT SALES ACTIVITIES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan sales activities 1) Sales activities are planned and scheduled in accordance with the marketing plan or other enterprise systems. 2) Sales planning includes consideration of both existing and potential customers. 3) Information is identified, analyzed and incorporated into sales planning, including: a. sales and marketing reports; b. financial statistics; c. market trends; d. competitive activity. 4) Prospects are pro-actively sourced and profile created. 5) Potential revenue is estimated in consultation with appropriate colleagues. 6) Activities are planned to maximize opportunities to meet individual and team targets. 7) Sales calls pattern are established according to the following as appropriate: a. specific sales and revenue targets; b. call intensity required; c. geographic considerations and restraints; d. current enterprise priorities; e. need for administration and reporting time.	**UNIT VARIABLES** Sales activities may be face to face or on the telephone. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in product knowledge, knowledge of the legal issues that affect

Element 2 – Prepare for sales calls 1) Where appropriate, appointments are made in advance. 2) Sales calls strategies and tactics are developed based on market knowledge, current sales focus and consultation with appropriate operational colleagues. 3) Specific information, data and support material are gathered for individual sales calls. **Element 3 – Makes sales calls** 1) Sales calls are made according to agreed call pattern. 2) Relationship is build with customers through the use of effective interpersonal communication styles. 3) Customer trust and confidence is developed through the demonstration of personal and professional integrity. 4) A pro-active approach is taken in identifying and resolving customer issues and problems. 5) Selling techniques are used to maximize opportunities to meet and exceed sales targets. 6) Information on product features and benefits is current, accurate and relevant to customer needs. 7) Sales calls take account of the current enterprise marketing focus. 8) Feedback from customers is encouraged and market intelligence is pro-actively sought. **Element 4 – Review and report on sales activities** 1) Sales reports are prepared in accordance with required timelines and enterprise procedures. 2) Market intelligence is presented in a manner which provides clear and concise information to those responsible for sales and marketing planning. 3) Market intelligence is shared with relevant colleagues. 4) All activities are reviewed in accordance with agreed evaluation methods and the results incorporated into future sales planning.	the sales executive role, industry and market knowledge, customer trends and preferences, knowledge of sales and marketing principles, ability to interpret marketing plan, sales techniques, planning and organizational skills in relation to sales activities. 2) Ability to plan and implement sales activities for the specific organization, logical and thorough planning which takes account of specific industry issues. 3) Ability to integrate preparation with actual conduct of sales calls.

APEC SS 2.01.04.05

COORDINATE MARKETING AND PROMOTIONAL ACTIVITIES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan marketing and promotional activities 1) Promotional activities are planned and scheduled in accordance with the marketing plan or other enterprise systems. 2) Overall objectives for activities are agreed with appropriate colleagues. 3) Relevant information is identified, analyzed and incorporated into short term planning including: a. marketing reports; b. sales reports; c. financial statistics; d. market trends; e. competitor activities. 4) Detailed action plans for promotional activities are developed and implemented at the appropriate time. **Element 2 – Coordinate participation in trade and consumer shows** 1) Invitations to participate in trade and consumer shows are evaluated to take account of the following factors: a. consistency with overall marketing plan; b. level of exposure to be achieved; c. matching of attendees to target markets; d. financial resources issues; e. human resource requirement; f. timing of event. 2) When participation is confirmed a plan is created to ensure timely attention and preparation to the following issues: a. staffing requirements and briefings; b. availability of brochures and display materials; c. contracting of other services (e.g. display); d. travel arrangements; e. strategies to ensure maximum benefits; f. fulfilling administrative and procedural requirements. 3) Participation is reviewed for effectiveness and amendments made accordingly. **Element 3 – Coordinate in-house promotions** 1) In-house promotions are scheduled and organized according to marketing plan. 2) A plan for promotions is created and implemented to take account of the following: a. objectives of the promotion; b. venue and location; c. duration; d. date selection; e. style and format of event; f. technical equipment required; g. number of invitees; h. who to invite; i. promotional materials required; j. budget available; k. public relations implications; l. design and distribution of invitations; m. coordination of RSVPs; n. need for external assistance; o. staffing implications; p. strategies for maximizing attendance and impact; q. possible cooperative approaches. 3) Promotions are reviewed for effectiveness and future amendments made accordingly. **Element 4 – Coordinate familiarization programs** 1) Familiarization programs are developed and conducted both in response to particular requests and pro-active approaches to take account of: a. potential enterprise benefits; b. current enterprise promotional focus; c. agreements with other organizations and suppliers; d. matching of itineraries to individual or group needs; e. use of new or unusual products to create maximum impact; f. FOC negotiations with product suppliers and operational budgetary constraints. 2) Appropriate participants are selected according to promotional objectives. 3) Administrative and booking details are efficiently organized. 4) Where appropriate familiarizations are escorted in a professional and friendly manner. 5) Familiarizations are reviewed for effectiveness and amendments made accordingly. **Element 5 – Undertake a general public relations role** 1) Relationships with industry and media colleagues are established and conducted in a manner that enhances the positive image of the organization. 2) Networks are used to assist in the implementation of promotional activities. 3) Where appropriate public relations resources are developed including media releases and industry/media support materials.	**UNIT VARIABLES** Marketing and promotional activities may include promotional events, display and signage initiatives, trade and journalists familiarizations, limited product development within scope of individual responsibility, market research, advertising campaign, industry and public relations activities. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in in-depth product knowledge, knowledge of related legal issues, industry and market knowledge, industry marketing and sales networks, product distribution systems, customer trends and preferences. 2) Ability to demonstrate competence and knowledge of sales and marketing principles and ability to interpret marketing plan, general knowledge of promotional activities such as trade shows, in-house promotions, advertising, public relations, familiarization, signage and display. 3) Knowledge in planning and organizational

Element 6 – Develop special products to meet customer needs 1) Opportunities to develop products to meet particular customer needs are identified. 2) Specific needs are established through consultation with the customer. 3) Development of products is agreed within scope of individual responsibility. 4) Products are developed in conjunction with appropriate colleagues. **Element 7 – Review and report on promotional activities** 1) Reports are prepared in accordance with enterprise policy and required timeframes. 2) Market intelligence is presented in a manner which provides clear and concise information to those responsible for sales and marketing planning. 3) Informal reports are made to relevant colleagues to maximize opportunity to meet team targets. 4) All activities are reviewed in accordance with agreed evaluation methods and the results incorporated into future planning.	skills in relation to marketing activities. 4) Ability to coordinate and organize a number of promotional activities. 5) Ability to logic and thorough activity planning including development of supporting organizational systems. 6) Knowledge of marketing principles and their application to practical workplace contexts.

APEC SS 2.01.05.05

ESTABLISH AND CONDUCT BUSINESS RELATIONSHIP*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish and conduct business relationships 1) Relationships are established within appropriate cultural context in a manner which promotes goodwill and trust between the enterprise, its customers and suppliers. 2) Effective communication skills and techniques are employed in relationships to build trust and respect. 3) Opportunities to maintain contact with customers and suppliers are taken up wherever possible. **Element 2 – Conduct negotiations** 1) Negotiations are conducted in a business like and professional manner within the relevant cultural context. 2) Negotiations are conducted using techniques to maximize benefits for all parties in the context of establishing long term relationships. 3) Negotiations take account of input from colleagues. 4) Negotiations are conducted in the context of the current enterprise marketing focus. 5) The result of negotiations is communicated to appropriate personnel within appropriate timeframes. **Element 3 – Make formal business appointments** 1) Agreements are confirmed in writing and contracts drawn up in accordance with enterprise requirements. 2) All aspects of formal agreements checked and approved in accordance with enterprise procedures. 3) Special advice sought in the development of contracts where appropriate. **Element 4 – Develop and nurture business relationships** 1) Information needed to nurture sound business relationships is pro-actively sought, reviewed and acted upon. 2) Agreements are honored within the scope of individual responsibility. 3) Adjustment to agreements are made in consultation with the customer/supplier and information is shared with appropriate colleagues. 4) Relationships are nurtured through regular contact and the use of effective interpersonal and communication styles.	**UNIT VARIABLES** Negotiations may include corporate accounts, agency agreements, venue contracts, rate negotiations, allotment agreements, marketing agreements etc. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge of related industry marketing and competitive environment, knowledge of related legal issues, internal enterprise capabilities & limitations and current marketing focus, negotiation skills and techniques, general knowledge of industrial contracts. 2) Ability to conduct business negotiations, knowledge and understanding of current industrial environment and operations. 3) Knowledge and understanding of contracts.

APEC SS 2.01.06.05

SELL PRODUCTS AND SERVICES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify customer needs 1) Specific customer needs and preferences including cultural needs are accurately identified. 2) Rapport is established with the customer to promote good will and trust. **Element 2 – Suggest products to meet customer needs** 1. Where appropriate research is undertaken to source information to meet specific customer needs. 2) Product options are tailored to the specific needs of the customer. 3) Suggestions are made in accordance with current enterprise promotional focus and preferred product arrangements where appropriate. 4) Customers are made aware of additional products and options which may enhance their benefits. 5) Options are provided within the appropriate or agreed timeframe. 6) Features and benefits are clearly explained and promoted to the customer. 7) Options are presented in a format and style most appropriate to the particular customer and in accordance with enterprise procedures. 8) Additional information is provided to overcome customer questions and objections. 9) Where appropriate	**UNIT VARIABLES** Selling could be face-to-face, on the computer, on the phone, in writing, related to specific product or the whole range of products of the enterprise etc. Specific customer needs may be related to preferences of different cultures/nationalities, family status, age, gender, available budget, time available, special interests. Products and services may include tourism products and services, special events & activities, health programs, destinations, hard ware and electrical equipment, garments, consumer goods, food & beverages etc. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in selling skills, communication skills especially listening and questioning, related legal liabilities and product knowledge

techniques are selected and used at the appropriate time to close sale with customers.	being sold. 2) Ability to apply sales process in response to a range of different customer situations, underpinning product knowledge, understanding of legal liabilities and issues.
Element 3 – Follow up sales opportunities	
1) Where appropriate follow up contacts is made with the customer. 2) Where appropriate after sales service is provided in accordance with enterprise procedures.	

APEC SS 2.01.07.05 (IDEM 1.02.XX.05)

MANAGE QUALITY CUSTOMER SERVICE*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop and implement approaches to enhance customer service quality 1) Informal and formal research is used to obtain information on customer needs, expectations and satisfaction level. 2) Changes in internal and external environments are considered in quality service planning. 3) Opportunities for colleagues to participate in the customer service planning process are provided. 4) Approaches are developed and communicated to colleagues and customers. **Element 2 – Monitor and adjust** 1) Customer service standards are monitored in the workplace in accordance with enterprise policies and procedures. 2) Feedback is sought on an on-going basis. 3) Coaching is used to assist colleagues to deal with customer service issues. 4) Colleagues are encouraged to take responsibility for customer service. 5) Customer service problems are identified and adjustments made accordingly to ensure continued service quality. 6) Adjustments are communicated to all those involved in service delivery within appropriate timeframes.	**UNIT VARIABLES** Formal and informal research on customer needs may include talking to customers, qualitative or quantitative research, feed back from service delivery colleagues, analysis of competitive environment and industry and market trends analysis. **ASSESSMENT GUIDE***: 1) Ability to demonstrate knowledge and competence in the principles of quality assurance, industry and market knowledge, competitive environment, overview of product development from quality assurance perspective. 2) Ability to develop pro-active approaches and enhancement of customer service.

APEC SS 2.01.08.05

COORDINATE THE PRODUCTION OF BROCHURES AND MARKETING MATERIALS*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan the production of brochures and marketing materials 1) Production is effectively planned and appropriate actions designed to take account of the following factors: a. objectives of the material; b. market for which material is required; c. Review of competitive materials; d. style and size of materials; e. time parameters; f. budget available; g. in-house production capabilities; h. distribution considerations either internal or external; i. availability of required information; j. any legal requirements or restrictions. **Element 2 – Produce information for inclusion** 1) Accurate and complete information is produced or obtained from the appropriate sources. 2) Information is presented in a clear and easily understood format. 3) Information is presented in a culturally appropriate way. **Element 3 – Obtain quotations for artwork and printings** 1) Accurate specifications are provided: a. size; b. number of colors; c. type of paper; d. number of photographs; e. layout and style of text; f. total number required; g. condition of contract; i. production and delivery deadline. 2) Comprehensive quotations are obtained with full details of potential variations to cost and conditions which may apply. **Element 4 – Develop final copy for brochures and marketing materials** 1) Copy is developed using basic creative writing techniques where appropriate to sell the products presented. 2) Copy is accurate regarding practical and operational details. 3) All costs are accurately presented with notes about conditions which may apply. 4) General conditions applying to information are clearly and accurately presented according to company policy. 5) All copy is thoroughly checked for accuracy prior to submission to external/internal art house or printers. **Element 5 – Coordinate the production of brochures and marketing materials** 1) Liaison is undertaken with production house or responsible staff member in a manner which permits accurate monitoring of production schedule. 2) All production work is fully checked and corrected as required. 3) All copy is re-checked and approved according to company guidelines prior to commencement of printing. 5) Brochures and marketing materials are obtained on schedule. 6) Contingencies plans are put in place to allow for situations where timelines may be exceeded.	**UNIT VARIABLES** Actual production or printing may be conducted either in-house or by an external agency. Brochures and marketing materials may include product brochures, destination guides, promotional flyers and leaflets, conference programs / registration forms, event prospectus, display materials, product support manuals, advertising materials, direct mail pieces, invitations, etc. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in market context for the materials being produced, print production processes & terminology, principles of planning, creative writing, methods for researching, preparation & proofing of copy, related legal issues including copyright laws. 2) Ability to coordinate all elements of the brochure development process. 3) Ability to produce materials that meet stated objectives, provide current and accurate information and are free of error.

APEC SS 2.01.09.05
CREATE A PROMOTIONAL DISPLAY / STAND *

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Make preparations for display / stand 1) Display/stand objectives are clearly identified in consultation with appropriate colleagues. 2) Information to assist in display/stand preparation is obtained at the appropriate time. 3) Display/stand is planned and adequate supplies of materials are selected and organized in accordance with the needs of the target market. 4) Assistance from display specialist is sought where appropriate. 5) Where appropriate, stand staff are assigned/employed and briefed to operate the display / stand. **Element 2 –** Set up display 1) Display/stand is created / dressed in professional manner using display techniques. 2) Display/stand is checked to ensure customer safety. **Element 3 –** Provide customer service 1). Customers are provided with information on the products and services being promoted in accordance with enterprise service standards. 2) Promotional materials are selected and provided to customers in accordance with their needs. 3) Details of potential customers are accurately recorded for future follow up. **Element 4 –** Follow up sales opportunities 1) Potential sales opportunities are followed up within an appropriate timeframe. 2) Style of follow up activity is selected in accordance with the nature of opportunity. 3) Colleagues are consulted on follow up where appropriate.	**UNIT VARIABLES** Promotional display / stands are set up and operated in a range of contexts including trade/consumer show, stand at meeting / conference event, in-house promotion, road show, window display, shopping center promotion. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge general display techniques typical for the enterprise. 2) Ability to create a display or dress a promotional stand to meet specific objectives using accepted display techniques.

APEC SS 2.01.10.05
DEVELOP, MANAGE AND EVALUATE MARKETING STRATEGIES*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Analyze the market 1) Market situation is conducted using established techniques in accordance with: a. available budget; b. the need for external assistance; c. existing market data; d. the need for additional data; e. internal and external issues and constraints. **Element 2 –** Prepare marketing strategies 1) Marketing strategies are developed at the appropriate time, using standard market planning techniques. 2) Strategies are developed to take account of: a. feedback from operational staff and other colleagues; b. time management and scheduling issues and constraints; c. resource constraints; d. the current industry context; e. the overall enterprise context; f. product development; g. market trends and customer preferences. 3) Opportunities for colleagues to contribute to the marketing plan are provided. 4) Priorities, responsibilities, timelines and budgets are clearly defined in the plan and communicated to the appropriate colleagues. 5) Marketing plan is submitted for approval where appropriate in accordance with enterprise policy. **Element 3 –** Implement and monitor marketing activities 1) Actions detailed in the plan are implemented and monitored in a cost-efficient manner and according to schedule and contingencies. 2) Reports are produced in accordance with enterprise policy. 3) Information of marketing activities is shared with operational staff to maintain awareness of current enterprise focus. **Element 4 –** Conduct ongoing evaluation 1) Marketing activities are evaluated using agreed methods and benchmarks. 2) Adjustments are made in accordance with evaluation. 3) Agreed changes are promptly communicated and implemented.	**UNIT VARIABLES** Marketing strategies may be for a specific product or service (new or existing), the enterprise, a destination, a single event. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in market analysis & planning techniques, internal & external issues which impact on market planning, industry marketing and distribution networks, research skills. 2) Ability to develop a marketing strategy for specific product, service or enterprise. Plans should identify current and relevant industry marketing issues and include a detailed & realistic implementation program. 3) Knowledge and understanding of specific implementation and monitoring issues.

APEC SS 2.01.11.05 (IDEM 1.02.XX.05)

RESEARCH DATA*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify research needs 1) Specific research needs are identified based on current business focus and needs of the organization. 2) Objectives of the research are developed in consultation with relevant colleagues and authorities. **Element 2 – Conduct research** 1) Research method is selected in accordance with objectives. 2) Where appropriate, documentation required for the research program is prepared. 3) Where appropriate, specialist assistance is obtained. 4) Research is conducted within agreed timeframes, in accordance with research methodology and budget parameters. **Element 3 – Interpret and apply research results** 1) Data collected is accurately analyzed and interpreted. 2) Results are used to inform current activities and future planning. 3) Research results are communicated to appropriate colleagues and external agencies in a timely manner with appropriate recommendations and observations.	**UNIT VARIABLES** Research methods may include questionnaires and surveys, interviews, focus groups, electronic polling, evaluating secondary data, desk research. Research may be related to customer preference, general visitor patterns, evaluation of marketing initiative, distribution network, potential product development initiative **ASSESSMENT GUIDE*:** 1) Ability to demonstrate competence and knowledge in research techniques & methodologies, role of research and sources of research data. 2) Ability to apply research knowledge to conduct research.

APEC SS 2.01.12.05 / APEC SS 3.03.09.05 / APEC SS 4.02.xx.05

MAINTAIN PRODUCT INFORMATION INVENTORY*

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Obtain and interpret information for inventory 1) Information to be included in inventory is obtained from internal and external colleagues at the appropriate time. 2) Information is correctly interpreted and reviewed prior to entry into inventory. **Element 2 – Enter data into inventory system** 1) Where appropriate information is accurately calculated prior to entry in accordance with enterprise procedures and commercial agreements or recheck with the person nominated for price calculation. 2) Information is correctly formatted and entered into the inventory system in accordance with enterprise procedures and commercial agreements. **Element 3 – Update inventory** 1) Inventory information is accurately updated at designated times in accordance with enterprise procedures. 2) Bookings / allotments / requests are monitored. 3) Out-of-date information is removed from the inventory within designated timelines. **Element 4 – Provide inventory information** 1) Inventory information, updates and briefings are accurately produced within designated timelines. 2) Reports and inventory information are distributed to appropriate colleagues in accordance with enterprise procedures. 3) Assistance to inventory-related matters is provided to colleagues.	**UNIT VARIABLES** Information inventory may include general information of enterprise products, company sales & marketing systems, rates / costs / tariffs, Terms and conditions of sales, special packages, sales data. **ASSESSMENT GUIDE*:** 1) Ability to demonstrate competence and knowledge in the role of product inventories for the company and inventory procedures and systems available. 2) Ability to accurately create, update and produce reports on a product inventory system within acceptable timeframes.

APEC SS 2.01.13.05 / APEC SS 2.02.xx.05 / APEC SS 4.06.xx.05

SELL MERCHANDISE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Apply product knowledge 1) Knowledge of the use and application of relevant products and services demonstrated. 2) Experienced sales staff or product information guide consulted to increase product knowledge. **Element 2 – Approach customer** 1) Timing of customer approach determined and applied. 2) Effective sales approach identified and applied. 3) Positive impression conveyed to arouse customer interest. 4) Knowledge of customer buying behavior demonstrated. 5) Customer is focused on specific merchandise. **Element 3 – Gather information from customer** 1) Questioning techniques applied to determine customer buying motives. 2) Listening skills used to determine customer requirements. 3) Non-verbal	**UNIT VARIABLES** The following variables may be present: a. store policy and procedures with regard to selling products and services; b. size, type and location of store; c. store merchandise range; d. store service range; e. store sales approach; f. product knowledge may include warranties, corresponding benefits of various products, use-by dates, storage requirements and stock availability; g. customers with routine or special requests; h. regular and new customers; varying levels of staff. Selling may be face-to-face or by telephone or internet. Customers may include people from a range of social,

communication cues interpreted and clarified. 4) Customers identified by name where possible.	cultural or ethnic backgrounds and physical and mental abilities.
Element 4 – Sell benefits	Handling techniques may vary according to type of merchandise sold and stock characteristics.
1) Customer needs matched to appropriate products and services. 2) Knowledge of product features and benefits communicated clearly to customers. 3) Product use and safety requirements described. 4) Customers referred to appropriate product specialist as required. 5) Routine customer questions about merchandise, such as price, price reductions, quality, age etc. are answered accurately, courteously and honesty or referred to more experienced sales staff.	Selling skill includes: opening techniques, buying signals, strategies to focus customer on specific merchandise, add-ons and complimentary sales, overcoming customer objections, and closing techniques.
Element 5 – Overcome objections	**ASSESSMENT GUIDE**
1) Customer objections identified. 2) Objections categorized into price, time and merchandise characteristics. 3) Solutions offered according to store policy. 4) Problem solving applied to overcome customer objections.	1) Look for: a. ability to selling techniques in a retail environment; b. general product knowledge.
Element 6 – Close sales	2) Underpinning knowledge and skills required include: a. store policies and procedures in selling products and services; b. relevant regulations including consumer law; c. store merchandise and service range; d. listening and questioning techniques; e. verbal and non verbal communication skills; f. negotiation techniques; f. customer buying motives; g. customer categories / types; h. types of customer needs, e.g. functional, psychological; i. problem solving techniques; j. performance analysis techniques; k. product knowledge; l. numerical skills.
1) Customer buying signals are monitored, identified and responded to appropriately. 2) Customer is encouraged to make purchase decisions. 3) Appropriate method of closing sale selected and applied.	
Element 7 – Maximize sales opportunities	
1) Opportunities for making additional sales recognized and applied. 2) Customer advised of complimentary products of services according to customers identified need. 2) Personal sales outcomes reviewed to maximize future sales.	

APEC SS 2.01.14.05 / APEC SS 2.02.xx.05 / APEC SS 4.06.xx.05
ADVICE ON MERCHANDISE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop product knowledge 1) Product knowledge developed, maintained and conveyed to other staff members as required. 2) Comparisons between products and services researched and applied including: brand options, product features, warranties, and price. 3) Competitors product and service range and pricing are identified and assessed. **Element 2 – Recommend specialized products** 1) Merchandise evaluated according to customer requirements. 2) Features and benefits of products and services demonstrated to customer to create a buying environment. 3) Detailed specialized knowledge of products applied to provide accurate advice to customers.	**UNIT VARIABLES** The following variables may be present: a. store policy and procedures with regard to selling products and services; b. size, type and location of store; c. store merchandise range; d. store service range; e. store sales approach; f. product knowledge may include warranties, corresponding benefits of various products, use-by dates, storage requirements and stock availability; g. customers with routine or special requests; h. regular and new customers; i. varying levels of staff; various types of customers (with routine or special requests, special needs, regular and new customers, varying backgrounds etc) Handling techniques may vary according to type of merchandise sold and stock characteristics. Selling skill includes: opening techniques, buying signals, strategies to focus customer on specific merchandise, add-ons and complimentary sales, overcoming customer objections, and closing techniques. **ASSESSMENT GUIDE** 1) Look for: a. ability to provide in-depth advice on merchandise as appropriate to the enterprise. 2) Underpinning knowledge and skills required include: a. store policies and procedures in selling products and services; b. relevant regulations including consumer law; c. store merchandise and service range; d. listening and questioning techniques; e. verbal and non verbal communication skills; f. negotiation techniques; f. customer buying motives; g. customer categories / types; h. types of customer needs, e.g. functional, psychological; i. problem solving techniques; j. performance analysis techniques; k. product knowledge; l. numerical skills.

APEC SS 2.01.15.05 / APEC SS 2.02.xx05 / APEC SS 4.06.xx.05
MERCHANDISE PRODUCTS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Place and arrange merchandise 1) Merchandise unpacked according to store procedures. 2) Merchandise placed on floor, fixtures and shelves in designated locations. 3) Merchandise displayed to achieve balanced fully stocked appearance and promote sales. 4) Damaged,	**UNIT VARIABLES** The following variables may be present: a. store policy and procedures with regard to selling products and services; b. size, type and location of store; c. store merchandise

soiled or out of date stock identified and corrective action taken as required according to store procedures. 5) Stock range placed to conform to fixtures, ticketing, prices or bar codes. 6) Stock rotated according to stock requirements and store procedures. 7) Stock presentation conforms to special handling techniques and safety requirements.

Element 2 – Prepare display labels/tickets

1) Labels/tickets for window, wall or floor displays prepared according to store policy. 2) Tickets prepared using electronic equipment or neatly by hand according to store procedures. 3) Soiled, damaged, illegible or incorrect labels / tickets identified and corrective actions taken. 4) Electronic ticketing equipment used and maintained according to design specifications. 5) Ticketing equipment maintained and stored in a secure location.

Element 3 – Place, arrange and display price tickets and labels (where applicable)

1) Tickets/labels are visible and correctly placed on merchandise. 2) Labels / tickets replaced according to store policy. 3) Correct pricing and information maintained on merchandise according to store.

Element 4 – Maintain display

1) Special promotion areas reset and dismantled. 2) Supervisor assisted in selection of merchandise for display. 3) Merchandise arranged as directed and/or according to lay out specifications and load bearing capacity of fixtures. 4) Unsuitable or out of date displays identified, reset and / or removed as directed. 5) Optimum stock levels identified and stock replenished according to store policy. 6) Display areas maintained in a clean and tidy manner. 7) Excess packaging removed from display areas.

Element 5 – Protect merchandise.

1) Correct handling, storage and display techniques identified and used according to stock characteristics.

range; d. store service range; e. store sales approach; f. product knowledge may include warranties, corresponding benefits of various products, use-by dates, storage requirements and stock availability; g. customers with routine or special requests; h. regular and new customers; i. varying levels of staff; various types of customers (with routine or special requests, special needs, regular and new customers, varying backgrounds etc).

Store ticketing and pricing policy may include: pricing gun, shelf tickets, shelf talkers, written labels, swing ticketing, bar coding, price boards, header boards etc.

Merchandise may be characterized by: type, size, brand, customer, color, etc.

ASSESSMENT GUIDE

1) Look for: a. ability to follow correct procedures for the selling of products according to store procedures; b. knowledge of techniques for the presentation of merchandise.

2) Underpinning knowledge and skills required include: a. store policies and procedures in selling products and services; b. relevant regulations including consumer law; c. principles of display; d. location of display areas; e. merchandise range and specifications; f. availability and use of display materials; g. merchandise life cycle; h. correct handling techniques for protection of shelf and merchandise; i. stock rotation; j. stock replenishment; k. numerical skills; safety requirements.

APEC SS 2.01.16.05 / APEC SS 2.02.xx.05 / APEC SS 4.06.xx.05

PROCESS POINT OF SALES (POS) TRANSACTIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Operate Point of Sale (POS) Equipment 1) POS equipment is operated according to design applications. 2) POS terminal opened and closed according to enterprise procedures. 3) POS terminal cleared and transaction transferred according to enterprise procedures. 4) Cash handled according to enterprise security procedures. 5) Supplies of change in POS terminal maintained according to enterprise policy. 6) Active POS attended according to store policy. 7) Records completed for transaction errors according to store policy. 8) Adequate supplies of dockets, vouchers and POS documents maintained. 9) Customers courteously informed of delays in POS process. **Element 2 – Perform POS transactions** 1) POS transactions completed according to store policy. 2) Store procedures identified and applied in respect of cash and non-cash transactions, such debit/credits cards, cheques, gift vouchers etc. 3) Store procedures identified and applied according to exchanges and returns. 4) Goods moved through POS area efficiently and treated according to fragility and packaging. 5) Information accurately and properly entered into POS equipment. 6) Price/total/amount of cash received stated verbally to customer. 7) Correct changed offered. **Element 3 – Complete sales** 1) Customer order forms, invoices, receipts are accurately completed. 2) Customer delivery requirements identified and processed accurately without undue delay. 3) Sales transactions processed without undue delay or customer directed to other terminals according to enterprise policy. **Element 4 – Wrap and pack goods** 1) Adequate supplies of wrapping material or bags maintained/requested. 2) Appropriate packaging material selected. 3) Merchandise wrapped neatly and effectively where required. 4) Items packed safely to avoid damage in transit, and labels attached where required. 5) Transfer of merchandise for parcel pick-up or other delivery methods arranged if required.	**UNIT VARIABLES** **This unit applies** to all kinds of stores selling merchandise. Store policies & procedures refer to operation of POS equipment, security and sales transactions. POS equipment may be manual or electronic. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to correctly operate POS equipment according to enterprise procedures within acceptable timeframes. 2) Underpinning knowledge and skills include: a. store policies and procedures regarding customer service and sales techniques; b. relevant regulations and consumer law; c. wrapping and packaging techniques; d. merchandise handling techniques; e. numeric skills.

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.02 - FINANCIAL ADMINISTRATION & MANAGEMENT (14 Units)

SUMMARY OF UNITS

Unit code	Unit Name	EIMTS	Total PC
2.02.01.05	Process financial transaction (idem 3.03.03.05)	2	7+8 = 15
2.02.02.05	Maintain financial records (idem 3.03.04.05)	2	6+4 = 10
2.02.03.05	Audit financial procedures (idem 3.03.05.05)	2	6+2 = 8
2.02.04.05	Prepare financial statement	3	1+3+2 = 6
2.02.05.05	Administer refunds settlement (idem 3.03.xx.05 / 4.02.xx.05)	2	5+3 = 8
2.02.06.05	Manage payroll records	3	4+5+5 = 14
2.02.07.05	Manage finances within a budget	4	5+4+6+3 = 18
2.02.08.05	Prepare and monitor budgets	3	4+10+4 = 18
2.02.09.05	Manage financial operations	8	4+6+5+4+6+2+4+3 = 34
2.02.10.05	Manage and purchase stocks	3	4+5+5 = 14
2.02.11.05	Process Point of Sales (POS) transactions (idem 4.06.xx.05)	4	9+7+3+5 = 24
	Total 11 units	36	169

APEC SKILL STANDARD UNITS CHAPTER 2.02 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.02.01.05 / APEC SS 3.03.03.05
PROCESS FINANCIAL TRANSACTIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Process receipts and payment 1) Cash float is received and accurately checked using correct documentation. 2) Cash received is accurately checked and correct change is given. 3) Receipts are correctly prepared and issued when required. 4) Non cash transactions are processed in accordance with enterprise and financial institution procedures. 5) Transactions are correctly and promptly recorded. 6) When payments are required, documents are checked and cash is issued according to enterprise procedures. 7) All transactions are conducted in a manner which meets enterprise speed and customer service standards. **Element 2 – Reconcile takings** 1) Balancing procedures are performed at the designated times in accordance with enterprise policy. 2) Cash float is separated from takings prior to balancing procedure and secured in accordance with enterprise procedures. 3) Register/terminals reading or print-out is accurately determined where appropriate. 4) Cash and non-cash documents are removed and transported in accordance with enterprise security procedures. 5) Cash is accurately counted. 6) Non cash documents are accurately counted. 7) Balance between register/terminal reading and sum of cash and non-cash transactions is accurately determined. 8) Takings are recorded in accordance with enterprise procedures.	**UNIT VARIABLES** Transactions may include credit cards, cheques, debit cards, deposits, advanced payments, vouchers, company charges, refunds, traveler cheques, foreign currency and other financial transactions. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in basic numerical skills, cash counting procedures, procedures for processing non-cash transactions and security procedures for cash and other financial documentation. 2) Ability to conduct accurate and secure financial transactions within acceptable timeframes. 3) Knowledge of basic handling principles and security procedures.

APEC SS 2.02.02.05 / APEC SS 3.03.04.05
MAINTAIN FINANCIAL RECORDS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Make journal entries 1) The correct journal is selected for intended entry. 2) Entries to journal are accurate and correctly located. 3) Journal entries are supported with explanation and cross-referencing to support documentation. 4) Irregularities are noted and acted in out for resolution within designated timelines. 5) Journal entries are correctly authorized. 6) Source documents are correctly filed. **Element 2 – Reconcile accounts** 1) Transaction documentation and account balances are accurately checked to ensure matching. 2) Discrepancies are identified, investigated or reported in accordance with level of individual responsibility. 3) Errors in documentation are rectified or reported. 4) Data is recorded on the nominated system within designated timelines.	**UNIT VARIABLES** Bookkeeping system may be manual or computerized. Journal entries may include cash receipts / payment, cash sales, petty cash, purchases journal, sales journal, return outwards journal, return inwards journal, main-general journal, payroll journal etc. Reconciliations may include petty cash, bank, subsidiary ledgers and control accounts, stock, etc. **ASSESSMENT GUIDE*** 1) Ability to demonstrate competence and knowledge in bookkeeping principles and terminology and typical record keeping systems as appropriate to the industry sector. 2) Ability to maintain accurate records within acceptable enterprise timeframes and in accordance with enterprise requirements.

APEC SS 2.02.03.05 / APEC SS 3.03.05.05
AUDIT FINANCIAL PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Monitor financial procedures 1) Transactions are checked in accordance with enterprise procedures. 2) Transactions are accurately balanced. 3) Balances prepared by others are checked in accordance with enterprise procedures. 4) Financial systems are implemented and controlled in accordance with enterprise	**UNIT VARIABLES** Transactions and financial / statistical reports may relate to daily/weekly/monthly transactions and reports, break-up by department, occupancy, sales performance, commissions earnings, sales returns, commercial account activity, foreign currencies activities, all types of payment.

procedures. 5) Systems are monitored and input provided to appropriate management on possible improvements. 6) Discrepancies are identified and resolved according to level of responsibility.	Financial system may include petty cash, debtor control, banking procedures etc.
	ASSESSMENT GUIDE*
Element 2 – Complete financial reports	1) Ability to demonstrate competence and knowledge in typical financial control processes and procedures as appropriate to the industry, internal & external auditing and financial reporting processes, importance of auditing & reporting processes in overall enterprise financial management. 2) Ability to accurately audit and provide reports on routine financial procedures within enterprise acceptable timeframes.
1) Routine reports are accurately completed within designated timelines. 2) Reports are promptly forwarded to the appropriate person / department.	

APEC SS 2.02.04.05
PREPARE FINANCIAL STATEMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Post actions to ledger	**UNIT VARIABLES**
1) Transactions are accurately posted from journals to the appropriate ledger accounts in accordance with accounting practices and enterprise procedures.	Recording mechanism / systems may be manual or automated.
Element 2 – Make end period adjustments	**ASSESSMENT GUIDE***
1) Ledgers are monitored and accurately adjusted at the appropriate time. 2) Adjustments are taken into account as appropriate: a. pre payments; b. accruals; c. depreciation; d. debts and closing stock. 3) Errors and discrepancies are noted and action is taken to rectify the discrepancies.	1) Ability to demonstrate competence and knowledge in basic accounting principles and practices such as: a. double entry system and concept of debits and credits in bookkeeping; b. basic transactions groups: assets, liabilities, proprietorship, income, expenses; c. balance sheet / P/L statement preparation. 2) Ability to accurately prepare and interpret financial statements within enterprise acceptable timeframes.
Element 3 – Produce balance sheets and P/L statement	
1) Balance sheets and P/L statements are accurately produced in accordance with standard accounting practices and enterprise requirements. 2) Information is accurately interpreted and distributed to appropriate people within required timeframes.	

APEC SS 2.02.05.05 / APEC SS 3.03.10.05 / APEC SS 4.02.xx.05
ADMINISTER REFUNDS SETTLEMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Report on sales and refunds	**UNIT VARIABLES**
1) Information and documents required for refunds settlement report is compiled at the appropriate time. 2) Documents are checked for accuracy and discrepancies identified and included in the report. 3) Document copies are correctly processed. 4) Refund notices and refund applications are accurately completed when appropriate. 5) Refund reports are accurately produced to include all transaction details.	**Refund procedures** may change according to specific enterprise procedures and government regulations.
	ASSESSMENT GUIDE
	1) Evidence should include demonstrated capacity to: a. process refund procedures and documentation; b. correctly apply relevant rules and regulations within acceptable enterprise timelines.
Element 2 – Complete billing and settlement	2) Underpinning knowledge and skills include: a. knowledge of refund procedures; b. knowledge of refund documentation; c. relevant regulations/requirements.
1) Payments are accurately calculated in accordance with refund procedures and adjustment systems. 2) Discrepancies are identified and acted upon in accordance with refund procedures. 3) Payments are made within designated timelines.	

APEC SS 2.02.06.05
MANAGE PAYROLL RECORDS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare payroll date	**UNIT VARIABLES**
1) Gross pay is accurately calculated from information contained in the agreement with the employee. 2) Compulsory and voluntary deductions are accurately calculated from relevant documentation. 3)	Recording systems may be manual or computerized.

Payment due to individual employees is calculated, or data referred to payroll processor for calculation within designated timelines. 4) Details of pay identifying gross and net amounts are correctly prepared for presentation to individual employees.

Element 2 – Process payment of salaries

1) Salaries and wages are prepared and issued within designated timelines. 2) Records are kept and maintained for taxation and auditing purposes. 3) Designated security procedures are followed at all times to ensure confidentiality and security of information. 4) Salary, wage and related enquiries are dealt with promptly and courteously. 5) Records are kept for the period as determined by government regulations.

Element 3 – Administer salary and tax report

1) Employee income tax report amounts are prepared and balanced from salary records. 2) Declaration forms for new and existing employees are completed in accordance with Taxation Office requirements. 3) Payments to government authorities are prepared and dispatched within the timelines designated by the authority. 4) Group tax amounts are calculated and/or transcribed and payments made in accordance with government procedures. 5) Periodic deductions are forwarded to nominated creditors within designated timelines (if applicable).

ASSESSMENT GUIDE*

1) Ability to demonstrate competence and knowledge Taxation Office requirements for salary records and payments, knowledge of appropriate industrial agreements for calculation of payment, knowledge of information in workplace agreements. 2) Ability to accurately calculate payment, produce accurate pay advice slips and maintain records according to enterprise and government requirements. 3) General knowledge in payroll procedures.

APEC SS 2.02.07.05
MANAGE FINANCES WITHIN A BUDGET

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Allocate budget resources 1) Funds are allocated according to agreed priorities. 2) Changes in income and expenditure priorities are discussed with the appropriate person prior to implementation. 3) All relevant personnel are kept informed of resource decision. 4) Colleagues are made aware of the importance of budget control. 5) Records of resource allocation are accurately detailed in accordance with enterprise control systems. **Element 2 – Monitor financial activities against budget** 1) Actual income and expenditure is checked against budgets at regular intervals. 2) Financial commitments are included to ensure accurate monitoring. 3) Deviations are identified and reported according to enterprise policy significance of deviation. 4) Appropriate colleagues are advised of budget status in relation to targets. **Element 3 – Identify and evaluate options for improved budget performance** 1) Existing costs and resources are assessed and areas for improvement are clearly identified. 2) Desired outcomes are discussed with relevant colleagues. 3) Research is undertaken to investigate new approaches. 4) Benefits and disadvantages of new approaches are clearly defined and communicated. 5) Impacts on customer service levels and colleagues are taken into consideration. 6) Recommendations are clearly and logically presented to the appropriate person / department. **Element 4 – Complete financial / statistical reports** 1) All required financial and statistical reports are completed accurately within designated timelines. 2) Reports are clear, concise and checked for accuracy. 3) Reports are promptly forwarded to the appropriate person/department.	**Range of variables** Budgets may include cash budgets, departmental budgets, budgeted P/L and balance sheets, wages budget, project budgets, purchasing budgets, sales budgets, cash flow budgets, budgets for small business. **Critical aspects of assessment*** 1) Ability to demonstrate competence and knowledge in budgeting including different types of budgets, budget structure and how to interpret a budget; knowledge of internal and external auditing requirements; knowledge of government regulations in specific relation to disbursement of funds and record keeping (if applicable); financial reporting procedures. 2) Ability to monitor income and expenditure in accordance with budget and to identify ways of improving budget performance. 3) Knowledge of basic budget principles and accounting / auditing / government regulation / reporting requirements.

APEC SS 2.02.08.05
PREPARE AND MONITOR BUDGET

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare budget information 1) Data required for budget preparation is correctly identified and assessed. 2) Data is reviewed and analyzed in readiness for budget preparation. 3) Where appropriate, directives from senior management or organizing committees are followed. 4) Internal and external environments are analyzed for potential impacts on budget planning process.	**Range of variables** Budgets may include cash budgets, departmental budgets, budgeted P/L and balance sheets, wages budget, project budgets, purchasing budgets, sales

Element 2 – Prepare budget 1) The budget is drafted, based on analysis of all available information and in accordance with enterprise policy. 2) Income and expenditure estimates are clearly identified and supported by valid, reliable and relevant information. 3) Alternative approaches are assessed and presented where appropriate. 4) Recommendations are presented clearly, concisely and in an appropriate format. 5) The budget draft accurately reflects enterprise objectives. 6) The draft is circulated for comments. 7) The draft is negotiated in accordance with enterprise policy and procedures. 8) Modifications are agreed and incorporated. 9) The final budget is completed in required format within designated timelines. 10) Colleagues are informed of final budget decisions and ramifications in a timely manner. **Element 3 – Monitor and review budget** 1) The budget is regularly reviewed to assess actual performance against estimated performance. 2) Significant deviations are investigated and action taken accordingly. 3) Changes in the internal and external environment are considered during budget review, and adjustment made accordingly. 4) Information is collected to assist in future budget preparation.	budgets, cash flow budgets, budgets for small business. **Critical aspects of assessment*** 1) Ability to demonstrate competence and knowledge in accounting principles & practices in specific relation with budget preparation, business documentation presentation, negotiation skills in specific relation to budgetary planning, research skills. 2) Understanding of the technical budget preparation process and accounting procedures that must be followed. 3) Ability to prepare a range of realistic and accurate budgets within the context of the workplace. 4) Ability to analyze and consider the internal and external factors that impact on the budget development process.

APEC SS 2.02.09.05
MANAGE FINANCIAL OPERATIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Develop approaches to financial management 1) The scope of financial management is assessed. 2) The need for specialist accounting assistance is identified and organized. 3) Approaches to financial management are developed based on overall direction and goals of the enterprise. 4) Financial management systems and procedures are developed in accordance with enterprise needs. **Element 2 – Develop and monitor financial procedures and systems** 1) The importance of financial objectives, management controls and systems are fully explained to all staff. 2) Procedures and systems are developed to meet all statutory requirements and internal control requirements. 3) Procedures and systems are developed for monitoring income and ensuring payment of accounts. 4) Compliance with procedures and systems is regularly checked. 5) The flow of financial information within the organization is monitored in terms of currency, accuracy and relevance. 6) Financial management systems are regularly reviewed and adjustments made in accordance with enterprise needs. **Element 3 – Prepare and monitor accounts** 1) Original entry systems are supervised to maintain accuracy and currency. 2) The general ledger is supervised and adjusted in accordance with accepted accounting practices. 3) Reports on current financial position are accurately generated. 4) Income and expenditure statements are accurately prepared. 5) Funds statements / statements of cash flow are accurately prepared. **Element 4 – Make pricing decisions** 1) Pricing decisions are made based on current and accurate financial and marketplace data. 2) Fixed, variable and semi-variable costs are identified. 3) Cost volume profit analysis is correctly performed and interpreted taking account of the limitation of this process. 4) Profit margins are accurately calculated in accordance with enterprise policy. **Element 5 – Monitor financial performance** 1) Budgets are monitored against performance targets on a regular basis. 2) Corrective budgets are negotiated as appropriate. 3) Financial ratio analysis is correctly conducted and information used to assist in financial planning. 4) P/L statements are accurately prepared and interpreted to assist in financial planning. 5) Remedial action is taken where appropriate. 6) Feedback on positive performance is communicated to appropriate personnel. **Element 6 – Forecast financial needs of specific projects** 1) Financial requirements and projections for special projects are effectively forecasted to include consideration of the following factors: a. cash flow implication; b. availability of short and long term sources of funds; c. market feasibility of the project; d. assessment of income and expenditure in light of project timing; e. accurate research on costing details; f. level of financial risk involved; g. cost benefit analysis; h. required level of profit from the project; i. impact of the project on overall organization financial position; j. industry	**Range of variables** Financial operations may be for an enterprise, a department within a larger establishment or a small business. **Critical aspects of assessment*** 1) Ability to demonstrate competence and knowledge in general knowledge of any government regulations to be met by all enterprise; knowledge of specific financial regulations and requirements appropriate to industry sectors; taxation issues; overview of economic issues which affect financial performance. 2) Understanding of the total financial management process within an enterprise. 3) Knowledge of financial control, reporting and monitoring systems. 4) Ability to integrate the financial management activities of a business with overall business operations.

environment and competition factors. 2) Specialist assistance is sought where necessary.

Element 7 – Prepare financial proposals for specific projects

1) Financial proposal are prepared to include: a. overview of the project and objective; b. the purpose and amount of finance required; c. the proposed structure of the project operations; d. the operational and marketing plan; e. projected financial performance; f. management experience and level of risk involved. 2) Financial proposals are presented in a clear, concise and professional format and manner. 3) Appropriate communication techniques are used to explain the details of financial proposals. 4) Meetings to discuss financial proposals are conducted in a professional and business like manager.

Element 8 – Prepare financial reports

1) Financial reports are prepared accurately and scheduled according to enterprise and statutory requirements. 2) Specialist advice is sought on reporting requirements. 3) Accurate and concise reports are prepared.

APEC SS 2.02.10.05

MANAGE AND PURCHASE STOCK

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish and implement an order and supply process 1) An order and supply process is established and implemented in the workplace. 2) Economic order quantity is established based on internal data and supplier advice. 3) Stock levels are determined according to peak seasons, special events and supplier's lead time. 4) Process is developed to include monitoring of quality during supply and delivery process. **Element 2 – Establish and implement stock control systems** 1) Stock control systems are developed and communicated to all appropriate staff. 2) Special control systems are applied to items showing high wastage of loss. 3) A range of data is used to calculate standards methods and measures and these are communicated to appropriate staff. 4) Systems are monitored in the workplace and adjustments made according to feedback and operational experience. 5) Staffs are trained to minimize stock wastage. **Element 3 – Develop optimum supply arrangements** 1) Quality of supply is evaluated based on feedback from colleagues and customers. 2) Potential suppliers are sourced and reviewed against enterprise requirements. 3) Purchase specifications are developed. 4) Suppliers are assessed against specifications. 5) Sources of supply are amended in accordance with assessment.	**Range of variables** Stock may include food & beverages, linen, housekeeping supplies & room amenities, stationery, cleaning agents & chemicals, groceries & general store. **Critical aspects of assessment**: 1) Ability to demonstrate competence and knowledge in methods of stock evaluation, methods of yield testing, planning, supplier and stock market knowledge. 2) Ability to develop stock purchasing and control system within enterprise context.

APEC SS 2.02.11.05

PROCESS POINT OF SALES (POS) TRANSACTIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Operate Point of Sale (POS) Equipment 1) POS equipment is operated according to design applications. 2) POS terminal opened and closed according to enterprise procedures. 3) POS terminal cleared and transaction transferred according to enterprise procedures. 4) Cash handled according to enterprise security procedures. 5) Supplies of change in POS terminal maintained according to enterprise policy. 6) Active POS attended according to store policy. 7) Records completed for transaction errors according to store policy. 8) Adequate supplies of dockets, vouchers and POS documents maintained. 9) Customers courteously informed of delays in POS process. **Element 2 – Perform POS transactions** 1) POS transactions completed according to store policy. 2) Store procedures identified and applied in respect of cash and non-cash transactions, such debit/credits cards, cheques, gift vouchers etc. 3) Store procedures identified and applied according to exchanges and returns. 4) Goods moved through POS area efficiently and treated according to fragility and packaging. 5) Information accurately and properly entered into POS equipment. 6) Price/total/amount of cash received stated verbally to customer. 7) Correct changed offered.	**UNIT VARIABLES** **This unit applies** to all kinds of stores selling merchandise. Store policies & procedures refer to operation of POS equipment, security and sales transactions. POS equipment may be manual or electronic. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to correctly operate POS equipment according to enterprise procedures within acceptable timeframes.

Element 3 – Complete sales 1) Customer order forms, invoices, receipts are accurately completed. 2) Customer delivery requirements identified and processed accurately without undue delay. 3) Sales transactions processed without undue delay or customer directed to other terminals according to enterprise policy. **Element 4 – Wrap and pack goods** 1) Adequate supplies of wrapping material or bags maintained/requested. 2) Appropriate packaging material selected. 3) Merchandise wrapped neatly and effectively where required. 4) Items packed safely to avoid damage in transit, and labels attached where required. 5) Transfer of merchandise for parcel pick-up or other delivery methods arranged if required.	2) Underpinning knowledge and skills include: a. store policies and procedures regarding customer service and sales techniques; b. relevant regulations and consumer law; c. wrapping and packaging techniques; d. merchandise handling techniques; e. numeric skills.

EMPOWER Associates for APEC TWG, 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.03 - HUMAN RESOURCES (09 Units)

SUMMARY OF UNITS

Unit Code	Unit Name	Elements	Performance Criteria
2.03.01.05	Roster staff*	2	6+2 = 8
2.03.02.05	Monitor staff performance*	3	6+5+4 = 15
2.03.03.05	Recruit and select staff*	4	5+7+4+3 = 19
2.03.04.05	Lead and manage people*	3	3+7+5 = 15
2.03.05.05	Manage workplace relations*	2	6+3 = 9
2.03.06.05	Provide mentoring support to business colleagues* (The Buddy System) (idem 1.02.xx.05)	2	2+6 = 8
2.03.07.05	Analyze SS Requirements* (idem 2.07.xx.05)	5	3+6+3+3+4 = 19
2.03.08.05	Manage workplace diversity*	3	3+2+3 = 8
2.03.09.05	Monitor workplace operations* (idem 1.02.12.05)	4	5+6+2+5 = 18
	Total 09 units	**28**	**119**

APEC SKILL STANDARD UNITS CHAPTER 2.03 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.03.01.05
ROSTER STAFF

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Develop and implement staff rosters 1) Rosters are developed in accordance with enterprise agreements. 2) Rosters take account of the need to maximize operational efficiency and customer service levels while minimizing remunerations costs. 3) Rosters are designed to meet requirements of remuneration budgets wherever possible. 4) Duties are combined to ensure effective use of staff. 5) Rosters are developed based on consideration of the most effective, optimum and appropriate mix of staff and skills base available. 6) Rosters are finalized and communicated to appropriate colleagues within designated timelines. **Element 2 – Maintain staff records** 1) Time/schedule sheets (where appropriate) are completed accurately and within designated timelines. 2) Staff records are accurately updated and maintained in accordance with enterprise procedures.	**UNIT VARIABLES** Roster may be for an individual department, the whole operation or a specific project. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in various types of rosters; roster design; in-depth knowledge of area operation; impacts of industrial relations and Equal Employment Opportunity (EEO) on staff roster. 2) Look for ability to prepare staff roster within the framework of established operations, systems and procedures within enterprise acceptable timelines.

APEC SS 2.03.02.05
MONITOR STAFF PERFORMANCE

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Provide performance feed back to staff 1) Colleagues are consulted about and informed on expected standards of performance. 2) On-going performance is monitored in the workplace. 3) Confirming and corrective feedback is provided to colleagues on an on-going basis. 4) Colleagues receive guidance and support in the workplace. 5) Achievements and outstanding performance are recognized and rewarded. 6) Need for further coaching or training is identified **Element 2 – Recognize and resolve performance problems** 1) Performance problems are promptly identified and investigated. 2) Feedback and coaching is used to address performance problems. 3) Possible solutions are discussed and agreed upon with the colleague in question. 4) Outcomes are followed up in the workplace. 5) Where necessary, formal counseling is organized. **Element 3 – Implement performance appraisal systems** 1) Formal performance appraisals are implemented in accordance with enterprise policy. 2) Individual performance appraisals are conducted openly and fairly in accordance with enterprise policy. 3) Appraisal records are completed and filed in accordance with enterprise policy and industrial agreements (if applicable). 4) Courses of action are agreed with colleagues and followed up in the workplace.	**UNIT VARIABLES** This unit applies to all organizations. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in: performance appraisal techniques and systems; knowledge of industrial relations and Equal Employment Opportunity (EEO) issues which impact on staff performance monitoring; one-to-one coaching techniques. 2) Look for: ability to provide feedback in a supportive manner; ability to conduct a formal performance appraisal in accordance with established policies and systems.

APEC SS 2.03.03.05
RECRUIT AND SELECT STAFF

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Identify recruitment needs 1) Short term recruitment needs are identified based on monitoring of service and efficiency levels in the workplace. 2) Colleagues are consulted in relation to staffing needs. 3) Selection criteria are developed based on the particular needs identified. 4) Job descriptions are used where appropriate. 5)	**UNIT VARIABLES** This unit applies to all organizations

Recruitment initiatives are approved in accordance with enterprise policy.

Element 2 – Administer recruitment process

1) Advertisements for positions are created, approved and disseminated in accordance with enterprise policy. 2) Applications are processed in accordance with enterprise policy. 3) Applicants are informed of decisions and provided with other recruitment information within reasonable timeframes. 4) Interviews and other selection processes are organized in accordance with enterprise policy. 5) Employment offers are made in accordance with enterprise policy. 6) Prospective employees are advised on details of workplace conditions and remunerations in accordance with enterprise policy and industrial/legislative requirements. 7) Documentation is processed and filed in accordance with enterprise policy.

Element 3 – Test and select candidate

1) Applications are reviewed against criteria. 2) Interviews and other selection procedures are conducted in accordance with enterprise policy. 3) Applicants are treated courteously throughout the selection process. 4) Selection criteria are used as the basis for selection.

Element 4 – Plan and organize induction program

1) Induction programs are planned and organized to introduce new employees to the workplace. 2) Induction programs contain all appropriate and practical information in accordance with enterprise policy and industrial / legislative requirements. 3) Information on the culture of the enterprise is included in induction programs.

ASSESSMENT GUIDE

1) Ability to demonstrate competence and knowledge in the following areas: a. interviewing techniques; b. purpose and contents of induction program; c. relevant legislation in relation to recruitment and selection of staff: EEO, Anti-discrimination, awards provisions/other enterprise agreement issues, dismissal procedures, and EJL / RCPP.

2) Look for: a. ability to establish accurate selection criteria for recruitment process, conduct fair and effective interviews, and make selections based on agreed criteria; b. understanding of recruitment administration systems and the legal environment in which recruitment takes place.

APEC SS 2.03.04.05
LEAD AND MANAGE PEOPLE

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Model high standards of performance and behavior 1) Individual performance serves as positive role model for others. 2) Individual performance shows support for and commitment to enterprise goals. 3) People are treated with integrity, respect and empathy. **Element 2 – Develop team commitment and cooperation** 1) Plans and objectives are developed in consultation with the team and clearly communicated. 2) Plans and objectives are consistent with enterprise goals. 3) Expectations, roles and responsibilities are communicated in a way which encourages individuals/teams to take responsibility for their work. 4) Individuals/teams efforts and contributions are identified, encouraged, valued and rewarded. 5) Open and supportive communication styles are modeled and encouraged within the team. 6) Information from the wider environment is shared with the team. 7) Support and guidance is provided including representation of teams interests in the wider environment. **Element 3 – Manage team performance** 1) Skills of team members are assessed and opportunities for individual development are provided. 2) Team performance is monitored to ensure progress towards achievement of goals. 3) Tasks and responsibilities are appropriately delegated and monitored. 4) Mentoring and coaching support is provided to team members. 5) Team achievements are recognized and rewarded.	**UNIT VARIABLES** Teams may be: project-based or permanent teams. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in: nature of management and leadership; principles of teamwork; motivation and leadership; conflict resolution in specific relation to leadership; industrial relations issues in people management; EEO (Equal Employment Opportunities) principles. 2) Look for: a. ability to build positive team spirit and effectively manage overall team performance; b. knowledge of leadership, motivation and people management principles.

APEC SS 2.03.05.05
MANAGE WORKPLACE RELATIONS

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Build a positive industrial relations climate 1) Employees are provided with accurate and impartial information on industrial matters likely to affect them. 2) Workplace changes or issues which may cause industrial unrest are identified. 3) Potential causes of industrial unrest external environments are identified. 4) Conditions of employment are created in accordance with relevant legislation and industrial awards / agreements. 5) Mechanism for consulting with staff and	**UNIT VARIABLES** Relevant parties should include Unions and Employer groups as appropriate to the industry. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in the areas of: a. government industrial system and regulations; b.

to facilitate two way communications are implemented. 6) Consultative structures for the identification and resolution of grievances are established.

Element 2 – Establish and implement formal industrial procedures

1) Procedures are developed in consultation with relevant parties in relation to: counseling; disciplining staff; grievances; and dispute resolution. 2) Procedures are communicated to all appropriate staff. 3) Agreed processes are used and monitored and appropriate adjustments made in consultation with relevant parties.

the role of Unions in the workplace; c. the role of Employer groups in the workplace; d. provision under relevant awards; e. procedures for workplace agreements; f. formal counseling and industrial dispute resolution procedures.

2) Look for: a. knowledge of industrial relations issues and regulations and their application to the particular industry sector; b. ability to interpret industrial awards and agreements; c. ability to develop procedures to handle industrial issues in the workplace.

APEC SS 2.03.06.05

PROVIDE MENTORING SUPPORT TO BUSINESS COLLEAGUES (THE BUDDY SYSTEM) (IDEM 1.02.xx.05)

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Establish relationship with business colleagues 1) Effective communication styles are used to develop trust, confidence and rapport. 2) Agreements are made on how the relationship will be conducted including: a. The amount of time involved for both parties; b. confidentiality of information; c. scope of issues to be covered. **Element 2 – Offer mentoring support** 1) The colleague is assisted to identify and evaluate options to achieve goals. 2) Personal experiences and knowledge are shared with the colleague to assist in progress towards goals. 3) The colleagues is encouraged to make decisions and take responsibility for the courses of action / solutions under consideration. 4) Supportive advice and assistance is provided in a manner which allows the colleague to retain responsibility for achievement of his/her own goals. 5) Changes in the mentoring relationship are recognized and openly discussed. 6) Adjustments to the relationship take account of the needs of both mentor and the colleague.	**UNIT VARIABLES** Mentor and colleagues assisted should work within the same company. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence, skills and knowledge in mentoring: its role and benefits, communication skills, related operational details. 2) Ability to use knowledge and experience to assist others and application of communication skills

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APEC SS 2.03.07.05 (IDEM 2.07.06.05)

ANALYZE SS REQUIREMENTS

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Identify client SS needs 1. The client and stakeholders are consulted to identify and document client SS needs. 2) Skill needs are defined using information collected from stakeholders. 3) The needs are grouped according to type, priority and possible solutions. **Element 2 – Undertake needs analysis** 1) Plan is developed for the needs analysis outlining: a. outcome; b. resources; c. timelines; d. responsibilities; e. target groups; f. sources of information. 2) Sources of information in relation to SS needs and the scope of skills are identified. 3) Data gathering methods are adapted and developed for efficient, reliable and valid information collection. 4) Any requirements of qualification or assessment or training recognition bodies are identified. 5) Information is collected, organized and analyze to identify skill components. 6) Grouping of SS is established to suit the requirements for skills development of the target groups. **Element 3 – Confirm findings of research** 1) Consultations with the stakeholders are conducted to verify research accuracy, usability within the intended context, and validity for the target groups. 2) Priorities for implementation of skill development are determined in terms of business goals, individual and organizational effectiveness, sources implication, cost benefit and lead time requirements. 3) Identified priorities and SS are documented and validated by stakeholders. **Element 4 – Document SS requirements** 1) SS requirements are documented in a manner appropriate to	**UNIT VARIABLES** **Client needs** may be increased productivity, increased enterprise profitability, attainment of specified industry or organization skills, achievement of community priorities, and regulation or licensing requirements. **Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities. **SS needs** may include: adaptation of industry SS to meet business goals, design or review of training programs, identification of productivity and other improvements, access and equity considerations, and human resources considerations (such as classification structure). **Data gathering methods** may include: surveys, interviews, Delphi procedures, nominal group techniques, concept mapping, focus group, job and task analysis, and analysis of assessment or training records. **ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in: a. any relevant SS and assessment guidelines; b. relationship of the SS to any industrial agreement; c. understanding of data gathering needs analysis theory and methodology; d. language and literacy skills required to comprehend sources of information and to prepare

client needs. 2) Combinations of SS are identified to match the required: a. business goals; b. job roles; c. skills related career path; d. employee classifications (where applicable); e. position descriptions; f. training programs; g. appraisal requirements; h. licensing or accreditation condition, if applicable. 3) Implementation plan is developed including: a. marketing and promotion; b. resource allocation; c. timelines.	required documentation in a clear and comprehensive format; e. planning of own work including predicting consequences and identifying improvements; f. compliance with requirements for copyright and other government regulations; g. communication skills appropriate to the culture of the workplace.
Element 5 – Validate competencies and implementation plans 1) Stakeholders are involved in the validation of documented SS and implementation plan and established processes are used to approve documentation. 2) Adjustments to documentation are made as required. 3) Documentation is approved through established process. 4) Any changes in related procedures, policies and processes are endorsed by stakeholders for implementation.	2) Look for documented client SS needs: SS needs analysis plan, report of research into SS needs, classification of needs according to type, priority and possible solution, and documented plan. 3) Look for: a. how the clients and stakeholders were consulted to identify SS requirements; b. how the needs analysis and SS proposed will contribute to organizational effectiveness; c. why the particular data gathering methods were used; d. how the data gathering methods and any other instruments used were checked for validity, reliability, cost effectiveness, administration ease and appropriateness; e. how the implementation plan was developed.

APEC SS 2.03.08.05
MANAGE WORKPLACE DIVERSITY

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Encourage respect for diversity in the workplace 1) Individual behavior provides a role model for others and demonstrates respect for diversity. 2) Planning and work practices are developed in a manner which shows respect for workplace diversity. 3) Colleagues are assisted and coached in ways of accepting diversity in relation to both colleagues and customers.	**UNIT VARIABLES** Diversity in the broadest sense may be related to : race, language, special needs, disabilities, religion, gender, family structure, age, and sexual preferences.
Element 2 – Use diversity as an asset 1) The skills of a diverse workforce are recognized and used to enhance enterprise performance. 2) Benefits of diversity are promoted to colleagues. **Element 3 – Deal with problems arising from diversity issues** 1) Workplace problems which arise from diversity issues are promptly recognized and action is taken to resolve the situation. 2) Training needs are identified and carried out. 3) Coaching and mentoring are used to assist colleagues to successfully work in a diverse environment.	**ASSESSMENT GUIDE** 1) Ability to demonstrate competence and knowledge in: specific industrial diversity issues which contributes to the industry progress; cross-cultural communication skills. 2) Look for: a. understanding of the role of leaders in encouraging effective cross cultural communications; b. knowledge of specific cultural issues related to the specific industry.

APEC SS 2.03.09.05
MONITOR WORKPLACE OPERATIONS

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 - Monitor and improve workplace operations 1) Efficiency and service levels are monitored on an on-going basis. 2) Operations in the workplace support overall enterprise goals and quality assurance initiative. 3) Quality problems and issues are promptly identified and adjustments are made accordingly. 4) Procedures and systems are changed in consultation with colleagues to improve efficiency and effectiveness. 5) Colleagues are consulted about ways to improve efficiency and service levels.	**UNIT VARIABLES** Problems may include difficult customer service situations, equipment breakdown/technical failure, delays and time difficulties. Workplace records may include staff records and regular performance reports.
Element 2 - Plan and organize workflows 1) Current workload of colleagues is accurately assessed. 2) Work is scheduled in a manner which enhances efficiency and customer service quality. 3) Work is delegated to appropriate people in accordance with principles of delegation of work and authority. 4) Workflow is assessed against agreed objectives and timelines. 5) Colleagues are assisted in prioritization of workload. 6) Input is provided to appropriate management regarding staff needs. **Element 3 - Maintain workplace records** 1) Workplace records are accurately completed and submitted within required timeframes. 2) Where appropriate completion of records is delegated and monitored prior to submission.	**ASSESSMENT GUIDE*** 1) Ability to demonstrate competence, skills and knowledge in the roles and responsibilities in monitoring work operations, overview of leadership and managerial responsibilities, principles of work planning, related SOP, quality assurance principles, time management, principles of delegation, problem solving

Element 4 - Solve problems and make decisions	and decision making process, and related
1) Workplace problems are promptly identified and considered from an operational and customer service perspective. 2) Short term actions are initiated to resolve the immediate problem where appropriate. 3) Problems are analyzed for any long-term impact and potential solutions are assessed and carried out in consultation with relevant colleagues. 4) Where problem is raised by a team member, they are encouraged to participate in solving the problem. 5) Follow up action is taken to monitor the effectiveness of solutions in the workplace.	legislative issues. 2) Ability to effectively monitor and respond to a range of common operational workplace issues. 3) Knowledge of principles of workflow planning, delegation and problem solving. 4) Knowledge of government regulations which affect short term work process.

APEC TOURISM WORKING GROUP
APEC SKILL STANDARD UNITS
2005

CHAPTER 2.04 - SECURITY (19 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Elmts	Total PC
2.04.01.05	Maintain the security of premises and property*	5	5+7+6+1+3 = 22
2.04.02.05	Determine and use reasonable security force to control, access to and exit from premises*	9	7+6+5+4+3+4+3+3+2 = 32
2.04.03.05	Maintain the safety of premises and property*	6	7+8+8+5+1+4 = 33
2.04.04.05	Manage intoxicated person*	6	3+2+3+6+4+1 = 19
2.04.05.05	Operate basic security equipment*	4	2+3+2+4 = 11
2.04.06.05	Apprehend offenders*	4	5+4+7+5 = 21
2.04.07.05	Screen baggage and people to minimize security risks*	4	4+5+2+2 = 13
2.04.08.05	Escort and carry valuables*	3	3+3+2 = 8
2.04.09.05	Control crowds*	7	3+2+2+3+7+3+2 = 22
2.04.10.05	Employ baton and handcuffs*	2	4+2 = 6
2.04.11.05	Interpret information from advance security equipment*	3	3+2+3 = 8
2.04.12.05	Operate central monitoring / communicating station*	5	3+2+4+3+3 = 15
2.04.13.05	Monitor field staff activity from control room*	4	3+3+3+2 = 11
2.04.14.05	Operate security vehicle	3	3+3+3 = 9
2.04.15.05	Manage dogs for patrols	4	4+4+4+3 = 15
2.04.16.05	Provide lost and found facility*	4	1+2+1+1 = 5
2.04.17.05	Observe and monitor people*	6	3+2+2+2+2+5 = 16
2.04.18.05	Plan and conduct evaluation of premises*	4	2+2+4+3 = 11
2.04.19.05	Provide safety for VIPs*	10	3+7+5+5+7+5+2+4+6+5 = 49
	Total 19 units	**93**	**337**

APEC SKILL STANDARD UNITS CHAPTER 2.04 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.04.01.05
MAINTAIN THE SCEURITY OF PREMISES AND PROPERTY

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Patrol premises 1) Equipment is checked for serviceability according to SOP. 2) Faults and damage to security equipment are identified, reported and recorded according to assignments instructions. 3) Faults and damage to security equipment are rectified or replaced where authorized to do so and when within the area of responsibility. 4) Factors which increase the risk to security are identified during patrol, reported, regularly monitored and recorded according to assignment instructions. 5) Previously reported risk factors are monitored and reported until rectified. **Element 2 – Monitor installed security system on premises** 1) System malfunctions are reported and recorded. 2) Electronic security and protection systems are set and verified according to assignment instructions. 3) Building management and energy management systems are set and verified according to assignment instructions. 4) Sources of signal received is identified, documented and appropriate action taken. 5) Content of activity log is maintained in an appropriate and legible manner according to assignment instructions. 6) After hours contacts are made where appropriate to the situation and correctly documented according to assignment instructions. 7) After hours contacts are made where appropriate to the situation and correctly documented according to assignment instructions. **Element 3 – Respond security alarm calls displays** 1) The alarm signal is interpreted correctly. 2) The cause of alarm and the action taken are notified to central office and/or police or fire brigade. 3) Codes/call signs are used appropriately in all radio / telephone communications. 4) Fire control systems are isolated and reset, including band smoke machines according to local related regulations. 5) Incidents are reported in the incident log. 6) The alarm site is attended as assigned. **Element 4 – Comply with pyrotechnic regulations** 1) Government regulations regarding pyrotechnic displays are observed and monitored. **Element 5 – Undertake specific site observation** 1) Observation of the site is undertaken according to assignment instructions. 2) The observation position is selected appropriate to the situation and the nature of the assignment. 3) Identified incidents are acted upon according to assignment instructions, clients and legal requirements.	**UNIT VARIABLES** **This unit applies** to all kinds of premises, indoor and outdoor. **Types of assignment** may include: occupied premises, un-occupied premises, static guard, mobile patrol, and control room operations. **Types of access** may include: doors, gates, shutters, fire& emergency doors, windows, skylights, cellar grills, hatches, roof, perimeter barriers, drains, and lifts. **Types of patrol** may include foot or vehicle patrol. **Security equipment** may include: locks, bolts, door fastenings, window fastenings, lighting, security cabinets, safes, desks, beams, trip wires, computers, screens, sirens, and electronic equipment. **Types of risks** may include: flood, fire explosion, intruders, vandals, vehicles & equipment in suspicious places, gas leaks, storms & other natural disasters, power failures, sensitive materials left in public areas, and terrorism related risks. **Security Systems** may include: intruder alarms, fire alarms, CCTVS, security video recorder, computerized / manual energy management program, computerized / manual building management program, telephone system: mobile or public, radio system: portable or mounted, screening equipment, sprinkler system, and smoke detectors. **Logs** may include: fire/intruder alarm logs, CCTV logs, computer/manual management for energy & building, management, lift alarm logs, and incident log book. **Assignment instructions** are those specified in the client / customer brief. **Types of signal** may include: fire alarm, lift alarm, electronic alarm: audible or vibration, equipment alarms, gas alarms, cool room alarms, boiler alarms, isolation to band smoke machines, and pyrotechnic displays. **Source of signals** includes alarm panel and sector. **ASSESSMENT GUIDE** 1) Ability to demonstrate capacity to: a. correctly interpret and act upon client requirement; b. correctly carry out site procedures and instructions, and identify and respond to faults, damage and factors, which increase the security risks; c. accurately interpret signals and information being received and respond to alarm signals; d. undertake specific site monitoring assignments; e. select appropriate site monitoring procedures given the assignment requirements. 2) Evidence includes: correctly maintained and completed reports (client and supervisor), electronic devices time clocks reports, radio checks reports, written reports, computer reports, and logs/journals/activity reports. 3) Underpinning knowledge and skills required: a. the steps necessary to arrange alarm deactivation; b. alarm systems and locations; c. communication codes; d. operation of communication equipment; e. control system operation; f. signal types and meanings; g. maker's/customer's instructions; g. client's instructions; h. surveillance techniques; i. security equipment installed; j. risk factor; k. site layout; l. building security procedures; m. knowledge of government regulations regarding pyrotechnic.

APEC SS 2.04.02.05
DETERMINE AND USE REASONABLE SECURITY FORCE TO CONTROL, ACCESS TO AND EXIT FROM PREMISES

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Control persons entering and leaving the site. Check permits, membership cards, and visitor passes 1) Determine and use reasonable security force to control access and exit from premises. 2) The eligibility of persons entering premises or restricted areas is verified by checking relevant details on identification documents. 3) The issue and return of entry pass is controlled according to assignment instructions. 4) Incident, which infringe employee/client instructions are reported and recorded. 5) Persons attempting to gain entry without authorization are reported and recorded as appropriate. 6) Persons attempting entry when not adhering to company dress code are dealt with in a courteous manner. 7. Visitors are received in an appropriate manner, appropriate person/s notified and escort provided if necessary according to assignment instructions. **Element 2 – Inspect baggage and/or vehicle** 1) Request to search a person's property are made according to assignment instructions, and having regards to legal requirements. 2) Justification to search of a person's property is clearly established having regard to government laws. 3) Searches are carried out according to assignment instructions. 4) Stolen, illegal or improper items found during a search are dealt with according to assignment and legal requirements. 5) Clients are notified of items found during search and further instructions are sought and acted upon where necessary. 6) Persons refusing search request are reported according to assignment instructions. **Element 3 – Manage vehicular traffic** 1) Vehicles access and issue of vehicle passes are controlled according to assignment instructions. 2) Vehicles parking are permitted according to assignment instructions and relevant regulations. 3) Vehicles incidents or accidents are reported to appropriate person and recorded. 4) Efficient parking plan are drawn up and management of car park facilities is undertaken including cashier accountability. 5) Concierge and valet parking duties are provided when required. **Element 4 – Check loading docks. Load and manifest entering and leaving sites** 1) Vehicles access and issue of vehicle passes is controlled according to assignment instructions. 2) Items being transported from the premises or site are checked against relevant documentation. 3) Vehicles entering/leaving the site are checked and/or monitored according to assignment instructions. 4). Loading docks are monitored and regularly patrolled. **Element 5 – Manage access control system** 1) Keys and key cards are controlled, recorded and monitored according to assignment instructions. 2) Controllable physical barriers are operated according to assignment instructions. 3) Key pad and alarm entry systems are activated and de-activated according to pre-described procedures and client's instructions. **Element 6 – Lock and unlock buildings** 1) Keys, keypads, key cards and alarm panels to secure premises are used according to maker/'client instructions. 2) Premises are controlled according to assignment requirements during opening and lock-up procedures. 3) Mechanical services and office equipment are turned-off according to instructions. 4) The client / assignment sale log-book is maintained. **Element 7 – Maintain inventory and record keeping of key system** 1) Keys are entered in key inventory system. 2) Keys are singed in and out on a shift basis. 3) Lost keys are documented and new locks installed where appropriate. **Element 8 – Conduct visitor registration** 1) Visitors are asked to report to security on entering and exiting premises. 2) Visitor badges are checked regularly. 3) Security clearance for visitors is obtained from management if appropriate. **Element 9 – Manage compliance of dress codes** 1) Dress code notices are displayed in strategic locations and customers and clients are advised accordingly. 2) Different situations are handled according to organizational policy including: lending clothing or suggesting alternative venues.	**UNIT VARIABLES** **This unit applies** to all kinds of premises, indoor and outdoor. **Identification documents** may include: ID cards, visitor passes, work permits, membership cards, load manifests, and goods receipt. **Incidents** may include: refusal to show pass, lost pass, using pass belonging to other party, accidents resulting in injury, vehicles incorrectly parked, stolen vehicles, forced entry of person/s or vehicles, and un-authorized items found during search. **Persons** may include: visitor, staff, suppliers, sales representatives, Contractors, all persons with valid reason for entering premises, emergency services, and demonstrations. **Types of assignment** may include: premises, property with and without vehicles barriers, with and without vehicle parking, but does not include airports where screening sites are available. **Types of barriers** may include: security turnstiles, airlock system, traffic barriers, remotely operated doors / shutters / gates, keypads and cards entry systems, and computerized entry system. **Times** are all times specified by assignment instructions. **Key control system** may be various. **Log book** is client log book. **ASSESSMENT GUIDE** 1) Evidence should include the proper operation of a variety of access to control systems and associated equipment relevant to the assignment. 2) Evidence should include demonstrated capacity to correctly: a. secure premises and systems according to assignment instructions; b. interpret assignments and instructions and deal with a variety of site monitoring situations; c. identify items and goods, which may be elicit, stolen or otherwise. 3) Evidence includes properly maintained log books, visitor's book, vehicle log, incident reports, computer entries and manifests, and key register accounting for all keys. 4) Underpinning knowledge and skills required include: a. relevant laws and by-laws; b. assignment instructions; c. ability to communicate clearly and courteously with clients and customers.

APEC SS 2.04.03.05
MAINTAIN SAFETY OF PREMISES AND PERSONNEL

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Respond to fire and safety alarm calls 1) The nature of emergency or safety situations is established. 2) The relevant emergency service is contacted immediately and given details of the emergency situation. 3) Emergency service access to site is provided. 4) Emergency services are provided with assistance and support according to capabilities and the situation presented. 5) The client is notified of the emergency situation according to assignment instructions. 6) All reports follow approved format and are compiled in a legible format. 7) Any need for changes to site operating procedures is noted and brought to the attention of the appropriate person. **Element 2 – Take preventive actions on potential security hazards** 1) Intoxicated persons showing early potential of incident are readily identified and managed early. 2) Staff handling procedures are followed. 3) Crowd numbers within restricted areas are managed. 4) The potential hazard is clearly identified, located and documented according to assignment instructions. 5) Risk from potential hazards are reduced if possible, and within own area of responsibility. 6) Warning signs for swimmers and house rules and regulations are clearly displayed, for example: a. children under adult supervision for swimming pools; b. strong current signs for beach areas; c. areas cordoned off for sailing of non-motorized craft and boundaries for motorized crafts marked; d. CPR and EAR signs. 7) Patrol times for lifeguards are clearly displayed and areas closely monitored particularly out of patrol times. 8) Follow-up actions is taken according to assignment instructions. **Element 3 – Manage emergency situations** 1) Familiarization is made of guidelines on management of major incident including gas leak, bomb management, siege situations, and armed robbery. 2) Emergency situations are investigated and assessed, and appropriate action is taken immediately. 3) Information identifying the location and type of emergency is given to appropriate services according to assignment instructions. 4) Onlookers / crowd / other persons are controlled and kept at a safe distance from emergency area. 5) Access points for emergency services are kept free from obstructions. 6) All instructions received from emergency services are carried out. 7) The client is notified of the emergency situation according to assignment instructions. 8) A complete written report is made according to assignment instructions. **Element 4 – Respond to bomb threats** 1) Bomb threat evacuation procedures are initiated according to assignment instructions. 2) Management and emergency services are informed immediately. 3) Special instructions from management for emergency services are carried out, for example, dispatch and monitoring of search teams. 4) Emergency access points are kept free from obstructions. 5) The area around identified suspected package or location is isolated, evacuated and monitored as appropriate. **Element 5 – Implement procedures for major incident planning** Procedures are in place, and implemented in the event of a major incident. **Element 6 – Manage a deceased persons situation** 1) The situation and condition of the person is assessed. 2) Appropriate emergency services are called, including police, ambulance and premise managers, and the exact time and location of persons is given. 3) The room / area are cordoned off and access	**UNIT VARIABLES** This unit applies to all kinds of premises, indoor and outdoor. **Types of emergency** may include: chemical, mains, medical alarms, industrial gases, suspicious parking, highly flammable material, bomb and explosive devices, suspicious behavior, and management of deceased persons situation. **Types of fires** may include: electrical, gaseous substances, flammable liquid. Contact with relevant emergency services may be made by: telephone/mobile phone, 2-way radio: portable or installed, dedicated communications link, and alarm, such as hold up. **Potential security hazards** may include: potential explosives, levels of vats, pressure level, valve levels & failures, safety risks, storage of chemicals, criminal act, faulty building works, faulty or broken equipment, gases, damaged glass, suspicious or armed persons, intoxicated persons, excessive crowd number within restricted areas, swimming locations, atmospheric contaminants, patrol of pools & beaches out of normal patrol hours, fires, sharks net maintenance, non-compliance with house rules/regulations. **Emergency situations** include: gas leak, bombs, siege situation, and armed robbery. **Reduction of hazard risk** may be achieved by: removing potential hazard, closing off area, marking area of potential hazard, and notify management, evacuation, regular patrols. **Appropriate persons** may include: building/center management, maintenance, and any other person who could reasonably be expected to deal with potential hazard. **Isolation** may include cordoning and evacuation. **Evacuation of premises to be made via**: prescribed primary route/s, designated alternative route/s, or designated assembly points. **Safety alarms** may include: date/person alarm, medical alarms, hold up alarms, or fire alarms. **ASSESSMENT GUIDE** 1) Evidence should include observation in the work environment. 2) Evidence should include: a. access a variety of potential hazards and initiate action to eliminate, reduce or otherwise deal with the hazard, e.g. contagious disease, strong beach currents, sharks, stingers etc.; b. select and use of appropriate fire fighting equipment; c. follow emergency procedures and comply with requests from emergency services; d. assess a variety of potentially dangerous situations requiring the movement of persons; e. implement established plans and procedures to control movement of persons; f. implement bomb threat procedures. 3) Evidence should include accurately completed and maintained log books and incident report. 4) Underpinning knowledge and skills required: a. basic fire fighting equipment used on the premises; b. emergency and evacuation procedures and instruction; c. potential hazards and risks; d. site lay out and access points; e. sprinkler / emergency systems; f. bomb threat procedures and instructions; g. OHSS requirements; h. knowledge of infectious/contagious diseases; i. site plan and equipment; j. assignment instructions; k. ability to communicate instructions to people in emergency situations; and l. marine

is given to emergency services only. 4) Guests or staff members are calmed and/or treated for shock, and the facts of the event are obtained.	regulation requirements for resort properties.

APEC SS 2.04.04.05
MANAGE INTOXICATED PERSONS

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES AND ASSESSMENT GUIDE
Element 1 – Determine the level of intoxication 1) The level of intoxication is established taking into considerations: gender, race, and culture. 2) Situations requiring back up assistance are assessed. 3) The situation is discussed courteously with the customer. **Element 2 – Apply appropriate procedures** 1) Appropriate procedures are applied according to the situation and organizational policy, including verbal warning and asking to leave the premises. 2) Customer service skills are used at all times. **Element 3 – Remove the person from premises** 1) The position is explained to the customer. 2) Assistance is offered and/or given including room in the hotel or taxi home. 3) The guest / customer is assisted to leave the premises if necessary. **Element 4 – Provide customer service** 1) Situations are analyzed carefully. 2) Explanations are given to customers throughout the event/incident. 3) Suggestions and alternatives are given to customers. 4) A quiet and respectful tone of voice is used at all times. 5) Tact and discretion are used in difficult situations. 6) Conflict resolution skills are employed where required. **Element 5 – Deal with underage drinker** 1) The situation is accurately assessed. 2) Identification is checked. 3) Underage drinkers are refused service of alcohol and advised courteously of reason. 4) Where under age persons are in a restricted area, they are tactfully asked to leave. **Element 6 – Comply with legislation** 1) The relevant liquor legislation is complied with in all situations concerning alcohol.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Situations** may include: a. dealing with difficult people, including those under the influence of drugs and/or alcohol; b. ejection of people from the premises (where authority exists); c. breaches of illegal requirements; d. persons attempting to bring prohibited items into the premises, such as alcohol, drugs; e. inebriation; f. abusive language to staff or other guests; g. noise disturbance to other guests; h. abusive or violent behavior to staff or other guests. **Persons** may include: staff, customers; visitors, contractors; and suppliers. **Situations** are those: a. occurring between members of the public and security personnel, and affecting the security or safety of persons, premises or property within the officer's responsibilities; and b. occurring between officers and agents/staff of the customer. **ASSESSMENT GUIDE** 1) Evidence should include a demonstrated capacity to: assess situations and propose solutions; and use conflict resolution skills. 2) Knowledge and understanding of the followings: a. 'standard' drink; b. effect of alcohol and factors which influence them; c. standard criteria for assessment of intoxication; d. relevant liquor regulations and laws; e. alcohol service and the principles of patron care which includes responsible service of alcohol; f. relevant driving regulations under the influence of drugs and alcohol.

APEC SS 2.04.05.05
OPERATE BASIC SECURITY EQUIPMENT

UNIT VARIABLES AND ASSESSMENT GUIDE	ELEMENTS AND PERFORMANCE CRITERIA
Element 1 – Operate communications equipment 1) All equipment is regularly checked to ensure it is operational. 2) All equipment is operated according to SOP. **Element 2 – Operate computer equipment** 1) Information is entered according to software instructions and sequences and SOP. 2) Information is entered, assessed and checked for reliability and accuracy. 3) Information is updated regularly where appropriate. **Element 3 – Monitor surveillance equipment** 1) Surveillance equipment is set up in accordance with management instructions. 2) Equipment is monitored on a constant basis. **Element 4 – Check basic monitoring equipment** 1) Records are legibly maintained according to assignment instructions. 2) Alarm sectors are tested according to assignment instructions. 3) Faulty equipment identified and steps taken to rectify the situation according to assignment instructions. 4) Back-up systems are arranged.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Communications equipment** may include: portable and mounted 2-way radio; mobile phones & fax; pagers. **Records** may include alarm generations **Computerized systems** may include: alarm systems; fire, mechanical services, lifts and emergency; energy management system; various manufacturers; those specified in assignment instructions. **ASSESSMENT GUIDE** 1) Evidence should include: a. correctly select and search computer menus as appropriate; b. accurately enter a variety relevant data; c. check and test monitoring equipment and nominate the steps necessary to rectify the situation. 2) Underpinning knowledge and skills required include: a. site and required monitoring equipment; b. operating and maintenance procedures for fire equipment; c. assignment instructions; d. communications systems as appropriate; e. employer requirements regarding collection and input of data; f. basic keyboard skills; g. identifying faulty equipment.

APEC SS 2.04.06.05
APPREHEND OFFENDERS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish if lawful arrest should be effected 1) The behavior of the suspect is clearly identified as constituting an offence according to relevant laws or by-laws. 2) Relevant circumstances are identified which clearly establish that an offence has been committed according to and national and local laws or by-laws. 3) Proof of offence is established according to relevant national or local laws and by laws. 4) The need to demonstrate that the arrest is justified / warranted is established. 5) Assessment is made to ensure that the arrest can be affected with minimum danger to self and the public. **Element 2 – Prepare for apprehension** 1) The courses of action in effecting the arrest are identified according to relevant legal requirements or local by-laws. 2) Relevant personnel are notified to imminent arrest if appropriate, and back up is called for as required. 3) The safety of self, offender and the general public are considered. 4) Optimum time, opportunity and location are selected to effect the arrest in order to ensure safety and to comply with assignment instructions, if appropriate. **Element 3 – Perform the arrest** 1) The need to restraint or secure the offender is established and action is taken according to relevant laws or by-laws and assignment instructions. 2) Legal rights of the person being arrested are observed at all times. 3) The offender is approached, identified and authority of the arresting officer is communicated to the offender where possible. 4) Reasons for the arrest are conveyed to the offender in a clear and concise manner where possible. 5) The offender and/or property are searched to obtain evidence to support the arrest if necessary, where possible, and within legal limitations. 6) The offender and/or property are searched to obtain articles that may be used to harm self or others. 7) Regards for OHS aspects of self, offender and others are displayed at all times. **Element 4 – Detain arrested person** 1) The arrested person is detained according to assignment instructions and taking into account legal constraints. 2) Police are notified according to establishment procedures, and supplied with all relevant details and evidence associated with the arrest. 3) Clients are informed of the arrest according to assignment instructions. 4) An account of the arrest is recorded according to assignment instructions and legal requirements. 5) Due to legal cause is clearly established in reports to police, clients or employer.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Monitoring** may take place by means of visual, camera, electronic, and other communications. **Apprehension** includes citizens and stand that operation is under a special warrant. **Apprehension procedures** may be those detailed in the assignment instructions and include detaining person/s pending a police arrest. **Time, opportunity and location of arrest** may be selected based on safety, discretion, or assignment instructions. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. interpret and adhere to agreed and lawful observation procedures; b. detect suspicious or unusual behavior under a variety of security observation conditions and circumstances; c. accurately identify offences justifying apprehension; d. formulate and apply a plan to apprehend offender in a safe, discreet and timely manner. 2) Underpinning knowledge and skills required include: a. effective methods of detention; b. assignment instructions; c. employer policy and procedures regarding surveillance and apprehension; d. relevant laws and by-laws covering the legal limitations of a security officer; e. perception and visual acumen; f. ability to distinguish the difference between normal and deviant behavior; g. knowledge of law as it applies to citizen's arrest, and authorization of special warrants.

APEC SS 2.04.07.05
SCREEN BAGGAGE AND PEOPLE TO MINIMIZE SECURITY RISKS

UNIT VARIABLES & ASSESSMENT GUIDE	ELEMENTS & PERFORMANCE CRITERIA
Element 1 – Operate screening equipment 1) Preliminary testing of equipment is performed to maker's specification. 2) Images are continually and consistently monitored and interpreted. 3) Prohibited and/or hazardous items are identified and appropriate action is taken according to assignment and legal requirements. 4) Faults and damage to security equipment are reported and recorded according to assignment instructions. **Element 2 – Undertake search of persons** 1) Need to undertake the search of a person is appropriately identified. 2) The search is conducted according to government / local regulations. 3) The search is carried out in an appropriate manner according to assignment instructions. 4) Persons being searched are provided with an explanation of the reason for the search. 5) The search is carried out only at appropriate locations and by persons of the same gender where possible according to specific regulation. **Element 3 – Follow investigative procedures** 1) Upon discovery of a prohibitive item, the suspect is informed of the item	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Search of persons** may include body search or pat down or both. **Legal constraints** include national or legal regulations. **Prohibited/hazardous items** include those specified by the customer or enterprise or by government regulations. **Screening equipment** may include: hand held, walk through, conveyer type or dogs. **ASSESSMENT GUIDE** 1) Demonstrated capacity to: a. identify and detect items and goods which may be elicit, stolen, dangerous to public, or otherwise in-appropriate, and take necessary actions; b. clearly indicate authority to customers and the public by means of physical presence.

discovered and the consequences. 2) The establishment's investigative procedures are followed.	2) Underpinning knowledge and skills required: a. relevant laws and regulations; b. assignment and legal requirements and procedures regarding search of persons; c. legal and enterprise requirements associated with seizure of goods; d. screening equipment manufacturer's operating instructions; e. ability to clearly communicate search/screening related requests; f. discretion in observing and/or searching.
Element 4 – Detain arrested persons	
1) Suspension procedures are implemented when no authorized personnel are on site, and the establishment's policy and procedures are adhered to. 2) Police are called immediately for serious offences, for example, theft and drugs, according to establishment's policy and procedures.	

APEC SS 2.04.08.05
ESCORT AND CARRY VALUABLES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare for escort assignment	**UNIT VARIABLES**
1) Assignment requirements are identified and clarified where necessary. 2) Resource requirements are assessed and obtained according to assignment instructions. 3) Adequacy of resources is appropriate to the assignment confirmed.	This unit applies to all kinds of premises indoor and outdoor.
	Assignment requirements are those specified in client brief and/or assignment instructions.
Element 2 – Participate in training for cash escort and movement through crowded areas	**Resource** may include: transport, receptacles, firearms & equipment, specific knowledge and skills.
1) Specialized training is conducted to escort cash and movement through crowded areas. 2) Routes are changed according to departmental guidelines. 3) Observation skills are used at all times during escort procedures.	**Client procedures** are those laid down in the assignment instructions.
	Valuables may include: documents, precious stones, jewels, bullion, cash, art works, other items considered of high value for specific reasons.
Element 3 – Undertake escort	**Potential threats** may include: hold up, vehicle accident, suspicious circumstances.
1) Potential threats / problems during assignment are identified and acted upon according to situation presented and assignment instructions. 2) Escort is undertaken in a calm and professional manner according to assignment instructions.	**ASSESSMENT GUIDE**
	1) Ability to demonstrated capacity to: a. carry out and escort assignments in a manner appropriate to assignment needs; b. monitor and assess all factors which might impact on the escort security and react in appropriate manner where necessary.
	2) Underpinning skills and knowledge required: a. knowledge on equipment required to complete assignment; b. assignment procedures; c. assessment and monitoring which may affect the safety and security of the escort both prior to and during its conduct; d. observation skills in identifying the likely source of risks.

APEC SS 2.04.09.05
CONTROL CROWDS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Inspect venue	**UNIT VARIABLES**
1) Precautionary crowd exit procedures are anticipated on arrival by identifying the number and location of exits, unlocking these as required and recording crowd exit details according to assignment instructions. 2) Communication between security personnel within the venue site is ensured by checking all communication equipment on arrival. 3) Communication to and from the venue is ensured by checking all communication equipment on arrival.	This unit applies to all kinds of premises indoor and outdoor.
	Communication equipment may include: 2-way radio; telephone; mobile telephone; PA system; megaphone; hand signals.
Element 2 – Provide security presence	
1) Security of venue is indicated to the crowd by taking up a guard position, which provides maximum risk. 2) Current security status of the venue and crowd are communicated regularly and as required to the supervisor or duty manager.	**Persons posing a potential threat to client's safe operation** of venue may include: intoxicated persons, under age persons, persons under influence of prohibited substances; and persons causing a public nuisance.
Element 3 – Monitor crowd size	
1) Maximum crow size is ascertained from assignment instructions. 2) Crowd size is monitored and managed to ensure correct numbers for maximum legal limit to any given space.	**Indications of disruptive or potentially disruptive behavior** may include: noise build up; greater concentration of crowds; crowds/individuals under the influence of drugs/alcohol; individual in an unsuitable locations.
Element 4 – Respond to potential crowd problems	
1) Persons or situations that may cause a breach of client's license are identified and appropriate action is taken. 2) Potential problems are identified and action is taken according to assignment instructions. 3) Persons behaving in a potentially disruptive manner are approached and advised of conditions of acceptable behavior in an appropriate manner according to assignment instructions.	**Potential hazards** may include: conflict between members of the crowd; conflict between security staff and members of the crowd; demonstrations; failure to comply with direction/request from authorized person; noise, light, heat, limited space, fatigue, glass furniture & fittings, stairways, smoke, weapons, clothing equipment, lack of facilities (e.g. toilets), decorations and utilities;
Element 5 – Monitor crowd behavior and safety	
1) Unusual crowd pattern, behaviors and mood changes are identified. 2)	

Identified problem spots are reported or acted on as required by assignment instructions. 3) Site/venue access is controlled according to assignment instructions. 4) Distress alarms are responded to according to assignment instructions. 5) Potential safety problems are identified, notified to appropriate personnel and action taken as appropriate. 6) Need for back-up support is recognized and acted upon immediately. 7) Force is used no more than necessary to render the situation harmless according to assignment and legal requirements.

Element 6 – Direct crowds

1) People are directed to correct location/s as specified and according to previously identified crowd control measures. 2) People are directed in a manner appropriate to the situation and according to assignment, client and legal requirements. 3) People are directed in a manner which minimizes risk of injury to crowd and self.

Element 7 – Cordon off appropriate areas.

1) Problem areas are identified with VIP party officials or police. 2) Designated areas are cordoned off.

and use of force continuum guidelines include those set down by local or police service and regulations.

ASSESSMENT GUIDE

1) Evidence should include capacity to: a. accurately evaluate site / venue lay out prior to assignment; b. assess and communicate security status of the venue to nominated personnel; c. detect disruptive behavior and deal with it in an appropriate manner; d. maintain a professional presence as a deterrent to potentially disruptive individuals and groups; e. accurately identify crowd size problems and assess steps to be taken; f. apply use of minimum force continuum guidelines.

2) Underpinning skills and knowledge required include: a. conflict resolution; b. relevant laws, regulations and by-laws; use of communications equipment and systems; d. distress alarm and action to be taken; e. assessment and monitoring of crowd behavior, size, safety and direction.

3) Evidence should include observation in the work environment.

APEC SS 2.04.10.05
EMPLOY BATONS AND HANDCUFFS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Carry batons / handcuffs 1) Batons / handcuffs are carried according to assignment instructions and legal requirements. 2) The need for use of batons / handcuffs is identified according to assignment and legal requirements. 3) Batons / handcuffs are selected according to appropriate need and related regulations. 4) Batons / handcuffs are checked on receipt and return to ensure they meet the employer safety requirements. **Element 2 – Use batons / handcuffs** 1) Batons / handcuffs are used according to standard procedures outlined in accreditation training and assignment instructions. 2) Batons / handcuffs are operated safely according to legal minimum force guidelines and with no more force than is necessary to render the situation harmless.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Minimum force guidelines** may include those set down by: national and local legislation; police services regulations. **Faults** may include: rust on equipment, damaged batons, jagged edges, cracks and dents. **ASSESSMENT GUIDE** 1) Evidence should include observation in the work environment. 2) Evidence should include demonstrated capacity to: a. justify the carrying and use of batons / handcuffs in various security situations and circumstances; b. assess situations and options available before selecting appropriate batons / handcuffs; c. select batons / handcuffs appropriate to a variety of situations and conditions; d. apply use of force continuum guidelines. 3) Ability to demonstrate skills and knowledge in: a. relevant legal, licensing and employer requirements; b. guidelines for the carrying and use of batons / handcuffs; c. safe use and handling of batons /handcuffs.

APEC SS 2.04.11.05
INTERPRET INFORMATION FROM ADVANCE SECURITY EQUIPMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Evaluate information from multiple sources 1) Complex systems are operated and monitored according to assignment instructions. 2) Information conveyed by complex systems is interpreted and acted upon according to client brief and assignment instructions. 3) Systems information is cross-checked by references to companion monitoring systems where appropriate and possible. **Element 2 – Respond to situations identified through security systems** 1) The situation is assessed by reference to all available information, and a response is formulated and implemented according to clients brief and assignment procedures. 2) All	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Sources of information** systems may include: CCTV, infra-red sensors, movement detector, wide angle cameras, intelligent building systems, electronic field detection systems, acoustic sensors, automatic entrance and exit devices, other intruder alarm systems, other access control systems, weighbridge operation, and fire alarms. **Incident report** may be verbal or written. **Companion monitoring systems** are parallel systems and may be written record or electrical monitoring systems. **Operational guidelines** may include employer, manufacturers or

incidents and actions are recorded and reported according to employer policies and procedures.	client.
Element 3 – Maintain control of security equipment	**ASSESSMENT GUIDE**
1) Systems are monitored and tested to ensure their performance is within defined operational guidelines. 2) Suspected or actual malfunctions or failures are acted upon and reported according to employer policies and procedures. 3) Back up procedures is implemented.	1) Evidence should include demonstrated capacity to: a. formulate and implement appropriate responses based on the information available; b. comply with client's requirements and procedures.
	2) Underpinning knowledge and skills required include: a. client's procedures and requirements; b. security systems and equipment; c. employer policies and procedures; d. decision making skills.

APEC SS 2.04.12.05

OPERATE CENTRAL MONITORING/COMMUNICATION STATIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Evaluate information from multiple sources	**UNIT VARIABLES**
1) Client input is assessed and an appropriate template followed. 2) Responses for alarms and managed time zones are formatted according to instructions. 3) Changes to client data base are completed as required.	**This unit applies** to all kinds of premises indoor and outdoor.
	Alarms may include: security alarms, fire alarms, building & management alarms, medical alerts, duress/hold up alarms, motor vehicle tracking, CCTV, communication status, and industrial alarms.
Element 2 – Commission client system	**Actions required** may include: notification of relevant personnel, notification of related services, dispatch of response / recovery of service, specific instructions as recorded in client brief, SOP, assessment of risk, assessment of response / recovery required, data update via verified input, database recovery procedures, and escalation procedures.
1) Field technical staff are recognized and authorized to generate signals from the system according to employer policy and procedures. 2) Incoming signals are verified for status and description.	
Element 3 – Assess the authenticity of client / customer requests	**Field technical staff** may include: system conversion technician, installation technician, and other authorized persons.
1) The authenticity of incoming callers is verified according to assignment instructions. 2) Passwords and codes are requested and verified according to assignment instructions. 3) All changes to client information and/or requirements are verified according to assignment instructions. 4) The authenticity of the caller when disputed or in question is referred to appropriate personnel.	**Change in alarm status** may include change from single to multiple activation of alarm system to CCTV.
Client requirements include those contained in: the client brief, alarm service information and alarm response procedures.
Element 4 – Hand over duties	**ASSESSMENT GUIDE**
1) Debriefing sessions are conducted with the outgoing shift according to assignment instructions. 2) Carry-over issues requiring resolution or attention are identified and allocated priority and appropriate resources. 3) Takeover duties is completed according to assignment procedures.	1) Evidence should include demonstrated capacity to: a. implement and monitor routine hand-over of duties; b. evaluate security and distress alarms and communication status signals relevant to own workplace, and determine a course of action based on client / employer instructions.
Element 5 – Respond to alarms received	2) Underpinning knowledge and skills include: a. alarm systems and equipment; b. password and codes procedures; c. customer / assignment procedures and requirements; d. client brief; e. decision making skills when evaluating alarm signals; f. communication skills for responding to alarm systems.
1) The alarm alert is identified and checked to determine location and priority according to employer policy and procedures. 2) Alarm activation is notified to relevant personnel and acted on according to employer requirements and/or client policies and procedures. 3) The status of the initial alarm is monitored regularly and changes in alarm status immediately notified to relevant personnel.	

APEC SS 2.04.13.05

MONITOR FIELD STAFF ACTIVITY FROM CONTROL ROOM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Monitor safety of field staff	**UNIT VARIABLES**
1) Field staff are continually monitored to ensure contact with the communication center are maintained according to employer policy and individual assignment requirements. 2) All incidents, emergencies and failures to communicate with the communication center are identified and dealt with according to assignment instructions. 3) Situations requiring back-up are identified and resources allocated to assist field officers according to assignment	**This unit applies** to all kinds of premises indoor and outdoor.
Alarms may include: security alarms, fire alarms, building & management alarms, medical alerts, duress/hold up alarms, safe alarms, and access control alarms.
Actions required may include: notification of relevant personnel, notification of related services, dispatch of field support staff, and specific instructions as recorded in client brief

instructions.

Element 2 – Monitor security activity of field staff

1) Variations to SOP are checked according to assignment procedures and notified to relevant personnel. 2) Field staff log-in calls are monitored to ensure compliance with assignment requirements. 3) All procedures are documented according to employer policy.

Element 3 – Coordinate responses to alarm signals

1) Availability of security personnel is assessed and officer dispatched as appropriate to alarm system. 2) Security personnel are provided with full, accurate and timely information to allow maximum effectiveness when attending the scene. 3) Security personnel's attendance at the scene of alarm is monitored, the need for back-up resources identified and acted upon.

Element 4 – Monitor security of vehicles in car park

1) Security patrols are undertaken according to establishment's procedures. 2) Surveillance cameras in car parks are monitored at all times

Change in alarm status may include change from single to multiple activation of alarm system.

Client requirements include those contained in: the client brief, alarm service information and alarm response procedures.

ASSESSMENT GUIDE

1) Evidence should include demonstrated capacity to: a. accurately access various situations involving field staff and take appropriate action; b. coordinate responses security, fire and access control alarms.

2) Underpinning knowledge and skills include: a. communications equipment and systems; b. customer / assignment procedures and requirements; c. field equipment and human resource requirements; d. decision making skills when analyzing the need to provide back-up or other support resources for filed staff; f. communication skills when sending and relaying information to field staff and/or emergency services.

APEC SS 2.04.14.05
OPERATE SECURITY VEHICLES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDE
Element 1 – Maintain vehicle condition 1) The condition of the vehicle is checked regularly according to employer policy and procedures. 2) Faults and malfunctions are identified and reported according to employer procedures. 3) Routine vehicle requirements are attended to in a timely manner and according to employer procedures. **Element 2 – Drive to/from assignments** 1) The vehicle is driven according to Road & Traffic statues and regulations. 2) The most direct route to assignment is chosen having regard to traffic and road conditions. 3) The vehicle is parked and secured according to manufacturer's instructions and assignment requirements. **Element 3 – Drive in response to an alarm signals or back up request** 1) The vehicle is driven according to Road & Traffic law and assignment instructions. 2) The quickest route to scene is chosen based on traffic and road conditions. 3) The vehicle is driven in a manner which minimizes risk of injury to self, other personnel and the public at all times.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Vehicles** may include: motor cars, vans, 4-wheel drive, or motor cycles. **Road conditions** may include: traffic, weather, and road conditions. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. drive, park and secure vehicle under a variety of routine conditions; b. comply with road and traffic regulations and employer vehicle procedures. 2) Underpinning knowledge and skills include: a. employer's vehicle policy and procedures; b. basic vehicle components and operation; c. reading and applying local street directory.

APEC SS 2.04.15.05
MANAGE DOGS FOR PATROL

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Select a suitable dog 1) The suitability of the dog is confirmed against assignment requirements using established criteria. 2) The compatibility of the dog and handles is established. 3) The dog's standard of efficiency is established by successfully completing training certification as required by authority regulation. 4) The dog's operating efficiency is maintained according to employer policy and/or licensing requirements. **Element 2 – Maintain the health and hygiene of the dog** 1) The health, hygiene and stability of the dog are assessed and maintained according to animal health and welfare requirements, employer policy and national local by-laws. 2) A record of the dog's health is maintained according to employer policy and health regulation. 3) The dog's hygiene is maintained according to employer policy and related regulations. 4) The need to retire or dispose of the dog is identified according to	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Dog handling team** includes security officer and dog. **Legal requirements** may include national and local laws and by-laws. **Established criteria** may include employer policy, client requirements and breeders guide book. **Animal health and welfare** may include canine organizations. **Situations requiring the use of a dog** may include assisting with an arrest, search of property, search of baggage, and foot/motor patrols. **Dog patrols** may include search of buildings and patrol of buildings, sites and crowds. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. respond to rapidly changing circumstances while handling a dog; b. apply the correct

animal health and welfare and legal requirements.

Element 3 – Conduct dog patrol

1) The patrol is planned and conducted according to employer policy and client requirements. 2) The dog is managed in a manner which provides minimal risk of injury to the public, the dog and the handler. 3) The dog is controlled according to employer and legal requirements. 4) Injuries to persons or the dog are attended to in a timely manner and according to legal requirements.

Element 4 – Respond to situations requiring use of a dog

1) The need to use the dog as security measure in response to the request or alarm is identified. 2) Results of assignments are reported and recorded in a timely manner. 3) The dog is transported according to employer and animal welfare requirements.

challenge release and arrest procedures for apprehending intruders; c. manage health and hygiene of a dog including ability to detect signs of ill health; d. handle a dog leashed and unleashed; e. apply the general safety procedures when handling and maintaining a dog in a working environment; and f. comply with relevant dog licensing regulations.

2) Underpinning knowledge and skills include: a. appropriate selection criteria; b. employer's dog policy and procedures; c. animal health and welfare requirements; d. legal requirements in relation to handling, use and ownership of dogs; e. kennel management (both routine and emergency treatment of sick or injured dogs); f. assignment requirements; g. insurance liability; h. maintenance of dog handling equipment; h. dog licensing regulations; i. capabilities and limitations of a trained dog; j. ability to handle a dog weighing a minimum of 40 kg; k. use of standard commands such as sit, down, stay, come, leave, no and ok; l. principles of scent, sight and sound.

APEC SS 2.04.16.05
PROVIDE LOST AND FOUND FACILITY

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Follow Lost & Found procedures 1) The location, date and time where the item is found or lost is established. **Element 2 – Complete Lost & Found documentation** 1) A description of the item and details is recorded in Lost & Found Book or Register. 2) The located item is tagged and filed in date order in an appropriate location. **Element 3 – Follow procedures for items claims** 1) The claimed items is signed / dated by claimant and ID Checked. **Element 4 – Follow procedures for unclaimed items** 1) Unclaimed items are kept for a period of time and according to company procedures and legal requirements.	**UNIT VARIABLES** This unit applies to all kinds of premises indoor and outdoor. Lost items / articles may include: a. expensive items such as cameras, jewelleries, cash, clothing etc; b. in-expensive items. Items may be stored in Lost & Found cupboard, or hotel safe. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. communicate on the telephone; b. utilize administration skills. 2) Evidence should include: a. correctly completed workplace documents including log/lost & found book or files; b. correctly maintained filing systems. 3) Underpinning knowledge and skills include: a. knowledge of establishment's lost and found procedures; b. knowledge of value of goods/items; c. knowledge of locations / areas within the establishment.

APEC SS 2.04.17.05
OBSERVE AND MONITOR PEOPLE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare to monitor / observe people 1) Assignment instructions are confirmed with the client. 2) Appropriate equipment to undertake assignment is selected and tested. 3) The location is established to maximize visual observation of the site target. **Element 2 – Check ID Cards** 1) Identification cards are checked, and display is ensured on entering the premises. 2) Spot checks are conducted regularly. **Element 3 – Monitor authorized access areas** 1) Authorized access areas are monitored by cameras. 2) Authorized access areas are monitored by personnel. **Element 4 – Monitor / observe items unattended** 1) Unattended items are monitored and checked. 2) Where unattended items are under suspicion, the area is cordoned off and police notified. **Element 5 – Respond to persons behaving suspiciously** 1) Individuals or groups behaving in a suspicious and/or unusual manner are identified and monitored according to agreed assignment instructions. 2) Suspicious incidents are recorded using video surveillance tapes and/or photographic evidence of persons, or other means as determined in assignment instructions.	**UNIT VARIABLES** This unit applies to all kinds of premises indoor and outdoor. Monitoring may take place by means of visual, camera, electronic, or other communications and surveillance equipment and systems. Relevant authorities may include police or emergency services. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. detect suspicious behavior under a variety of security observation conditions and circumstance; b. accurately identify offenses and justifying action or apprehension. 2) Underpinning knowledge and skills

Element 6 – Respond to unlawful or suspicious behavior	include: a. relevant national or local
1) The commitment of an offense or behavior which constitutes an offense is identified. 2) Proof of commitment of the offense is obtained. 3) The level of appropriate response is identified in accordance with applicable laws pertaining to the surveillance operation. 4) Help of colleagues is enlisted in the operation as required. 5) Relevant authorities are notified if required.	laws and by-laws; b. assignment instructions.

APEC SS 2.04.18.05
PLAN AND CONDUCT EVACUATION OF PREMISES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Contribute to writing of policy and procedures for an evacuation situation 1) Evacuation policy and procedures are analyzed and discussed. 2) Evacuation policy and procedures are written. **Element 2 – Participate in conducting staff evacuation drills** 1) Staff evacuation drills are scheduled on a regular basis. 2) Drills are conducted in accordance with evacuation policy and procedures. **Element 3 – Communicate regularly with fire wardens** 1) Fire wardens are identified in the differing locations. 2) Regular communication meetings are established. 3) Spontaneous visits/briefings are conducted with fire wardens. 4) Fire warden receive necessary documentation / notices. **Element 4 – Conduct evacuation** 1) Evacuations are conducted according to policy and procedures. 2) Instructions and explanations are given clearly. 3) Evacuation of premises is carried out according to building / site evacuation plan and/or assignment instructions.	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Types of evacuation** may include: fire, bomb, poisonous gas, highly flammable materials, and explosive device. **Types of fires** may include: electrical, gaseous substances, flammable liquids and fats, and combustible materials. **Contact with relevant emergency service** may be made by: telephone and mobile phone; 2-way radio, portable or installed; dedicated communication link, or direct alarm link. **Relevant emergency services** may include: fire, ambulance, national/local emergency services, police, and army bomb disposal unit. **Potential safety hazards** may include: falling debris, smoke inhalation, stairway exits blocked, incorrect use of fighting equipment, potential explosives, pressure level, and incorrect / insufficient information on location and intensity of fire. **Reduction hazards risk** may be achieved by: removing potential hazard, closing off area, marking area of potential hazard, and notify management. **Appropriate persons** may include: building/center management, maintenance and/or security section, and any other person who could reasonably be expected to deal with potential hazard. **Isolation** may include: all premises within officer's responsibility or those defined in assignment instructions. **Evacuation of premises** may be made via: prescribed primary route/s, designated alternative route/s, or to designated assembly point. **Safety alarms** include: date/person alarm and fir alarm. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. assess a variety of potential hazards and initiate action to eliminate, reduce or otherwise deal with the hazards; b. select and use appropriate fire-fighting equipment; c. follow emergency procedures and comply with requests from emergency services; d. assess a variety of potentially dangerous situations requiring the movement of persons; e. implement established plans and procedures to control movement of persons with disabilities, the aged, children etc; f. implement bomb-threat procedures. 2) Evidence should include accurately completed and maintained log book and incident report. 3) Underpinning knowledge and skills include: a. basic fire fighting equipment; b. emergency and evacuation procedures and instructions; c. potential hazards and risks; d. site layout and access points; e. sprinkler / emergency systems; f. bomb-threat procedures and instructions; g. OHS requirements; h. site plan and equipment; i. assignment instructions; j. ability to communicate instructions to people in emergency situation; k. compliance with national/local standards for emergency control, organization procedures for buildings etc.

APEC SS 2.04.19.05
PROVIDE SAFETY OF VIPs

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify potential threats to clients safety 1) Assignment arrangements are clarified where necessary and any resource requirements are assessed and identified. 2) Factors which may affect the safety of the escorted person are identified and acted upon according to the situation presented and assignment instructions, for example, particular hazards such as stairways, large drop offs and stage barriers. 3) The person	**UNIT VARIABLES** **This unit applies** to all kinds of premises indoor and outdoor. **Resources** may include: transport, receptacles, firearms & equipment,

to be escorted is advised appropriately of all factors which may affect their safety.

Element 2 – Run security checks on relevant staff

1) Appropriate staff are selected to attend to the VIP according to selection criteria of establishment including: length of service; recommendations from previous guests; and language skills. 2) Security checks are conducted on selected persons by police, including Special Branch for political persons.3) Clearance is established from security check and a "top security ID Card" or color coded tag relevant for the specific visit, is issued by the Special Branch. 4) All staff are instructed to carry ID at all times. 5) Mail, letters, faxes, emails are delivered to Security Room only. 6) An overall liaison officer is appointed to manage the visit.

Element 3 – Conduct search of premises

1) A search plan of the entire premises is drawn up together with the police. 2) Briefing is arranged with appropriate members of the search team. 3) The search is conducted according to drawn up plan. 4) Premises staff are alerted, particularly when dogs are used in search. 5) Lifts are keyed off when appropriate.

Element 4 – Establish and guard "No GO Zone/Areas"

1) "No go zones/areas" are identified and locations with police, bodyguards of VIPs or press secretary are agreed as appropriate. 2) Duty rosters are established for 24 hours surveillance of area/zone. 3) Existing camera surveillance equipment is adequately utilized in specified zone and monitored 24 hours a day. 4) Lifts are keyed off as and when appropriate, according to VIPs schedule. 5) Negotiation and communication with VIPs own security staff is appropriately carried out.

Element 5 – Provide all relevant information to staff

1. All relevant information on VIPs visit is communicated to staff, including informing them of any areas out-of-bounds. 2) Staff are informed of details of visit on a "needs to know" basis with emphasis on strict confidentiality, even to close friends and family/spouse. 3) Bodyguards, police or other staff of the VIPs are issued special ID Cards for access to back of the house, and all staff briefed accordingly. 4) Changes to schedule of VIPs are communicated immediately to appropriate persons. 5) Training for security and relevant staff is conducted weeks prior to the event. 6) Be ensured that security and staff involved in the visit participate in all briefings and training sessions as appropriate. 7) Staff is given a full brief immediately prior to the visit.

Element 6 – Install and test surveillance and communication equipment

1) Additional surveillance equipment is identified with relevant persons, including police and bodyguards of VIP. 2) Sites are checked and installation overseen. 3) Equipment is tested to ascertain if functioning and providing coverage required. 4) Test runs are conducted on each piece of communication and surveillance equipment prior to visit. 5) A test run is completed on each piece of communication equipment immediately prior to arrival time.

Element 7 – Set up a central "command post"

1) A central "command post" is established which is free from heavy traffic flow, private, able to be secured and has close street access. 2) Food and beverage is supplied, and toilet facilities in the vicinity of the "command post" are identified.

Element 8 – Key off lifts

1) Communications are sent out well in advance in situations when lifts are to be keyed off so operations staff can reschedule and plan daily work flow. 2) Notices are placed appropriately so that attempts are not made to use allocated lifts during the specified time. 3) Access to lifts is cordoned off and one security officer placed in position until VIP party arrives. 4) Additional lifts are keyed off for back-up five (5) minutes prior to VIP arrival and then released once VIP has reached the destination.

Element 9 – Make final check and conduct dress rehearsal

1) Sight tests are conducted and all security and appropriate persons in place prior to arrival. 2) Communications tests are conducted, all persons and security are in place, and it is re-run when arrival time is given by approaching VIP party. 3) A dress rehearsal is conducted when all persons are in position. 4) Feedback is given at the end of rehearsal and last minute changes are given. 5) A last communication check is conducted and "all clear" is verified for arrival. 6) Clearance is given for arrival to VIP party.

Element 10 – Greet and escort

1) Introductions and identification is given to VIP. 2) VIP and party are escorted to designated area according to assignment instructions. 3) Observation skills are utilized at all times. 4) People are escorted in a manner appropriate to the assignment. 5) Appropriate responses to changing circumstances are formulated and reassessed throughout the assignment.

specific knowledge & skills, and police assistance to provide road closures, dog searches etc.

VIPs may include: executive personnel or Royalty, Heads of States, political guests/visitors, pop stars, bands, etc.

Communication equipment may include: 2-way radio, telephone, mobile phone, pager service, and in-house camera systems.

Persons posing a potential threat to client's safety may include: intoxicated persons; persons causing a public nuisance; politically motivated persons; or mentally disturbed persons.

Indications of disruptive or potentially disruptive behavior may include: noise build up; greater concentration of crowds; crowds or individuals under the influence of alcohol/drugs; and individuals in an unsuitable locations.

Potential hazards may include: conflict between members of the crowd; conflict between security staff and members of the crowd; demonstrations; use of alcohol/drugs; failure to comply with direction/request from authorized person; hysteria of fans; mobbing and surging forward of people / fans en masse; people blocking access to premises; thrown objects; and people fainting / ill in crowd.

ASSESSMENT GUIDE

1) Evidence should include demonstrated capacity to: a. accurately identify and assess all factors which might impact on the safety of the escorted person, and the capacity to convey that information to the person when and if appropriate; b. accurately assess a variety of assignment needs and instructions, and determine approaches and resources to be applied.

2) Underpinning knowledge and skills include: a. equipment required to complete the assignment; b. assignment procedures regarding the escort of people; c. observation skills in identifying the likely source of risks; d. interpersonal and communication skills required to carry out escort assignments; e. relevant national and local laws and by laws; f. use of communications equipment and systems; and g. distress alarm and action to be taken.

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.05 - GARDENING & LANDSCAPING (07 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Total elements	Total PC
2.05.01.05	Provide turf care	2	5+3 = 8
2.05.02.05	Fell small trees	4	3+3+4+5 = 15
2.05.03.05	Transplant small trees	4	5+3+4+6 = 18
2.05.04.05	Establish planted areas	3	3+4+4 = 11
2.05.05.05	Propagate plants	4	3+2+3+9 = 17
2.05.06.05	Prune shrubs and small trees	3	6+2+5 = 13
2.05.07.05	Implement a landscape maintenance program	3	3+4+6 = 13
	Total 07 units	**23**	**95**

APEC SKILL STANDARD UNITS CHAPTER 2.05 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.05.01.05
PROVIDE TURF CARE

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Mow grass areas 1) Mower is serviced to manufacturer's specifications and organization policy. 2) Grass is mown at height and in a pattern specified by supervisor. 3) Mowing is at an appropriate distance from trunks of trees and shrubs to prevent damage. 4) Mower controls are used safely and efficiently to complete the mowing program according to supervisor instructions. 5) The mower is maneuvered in a controlled manner without excessive speed in accordance with organization OHS guidelines. **Element 2 – Maintain grass areas** 1) Rubbish collected, weeds are removed according to supervisor instructions and disposed of according to enterprise guidelines. 2) Grass mown and edges trimmed to meet presentation standards of the organization. 3) Tools and equipment cleaned, maintained and stored consistent with manufacturer's specifications and enterprise policy.	**UNIT VARIABLES** **Turf maintenance** may include: mowing with pedestrian or ride-on machines and edge trimming. **Tools and equipment** may include: a. 2 and 4 stroke pedestrian and ride-on rotary mowers; b. cylinder mowers; c. motorized blowers; d. pavements sweepers; e. diesel ride-on mowers and sweepers; f. turf edging machines and brush cutters. **Vehicle licenses** are required when turf maintenance equipment must be driven on public roads. **ASSESSMENT GUIDE** 1) Ability to mow and maintain grass areas. 2) Underpinning skills and knowledge of: a. OHS guidelines; b. manual handling guidelines; c. enterprise standards fro grass appearance; d. correct use and care of equipments; e. correct set-up, use and cleaning procedures for tools and mowing equipment, minor repairs and service requirements; f. worksite traffic management. 3) Ability to tidy up site upon completion of tasks; to follow all OHS procedures; and to demonstrate safety and comfort of guests as primary consideration.

APEC SS 2.05.02.05
FELL SMALL TREES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine natural direction of fall 1) Topography and site conditions are assessed and all factors influencing the determination of the direction of fall are identified according to established tree felling principles. 2) Natural direction of fall is determined having regard for weight bias, canopy distribution, lean on trees, together with topography and site conditions. 3) Hazards associated with feeling operation are identified according to industry practice. **Element 2 – Remove obstructions within fall zone** 1) Clearance zone is established by calculation of height of tree using published mathematical principles. 2) Safety margin fro drop zone is determined by identifying wind direction and speed at the time of felling. 3) Drop zone is cleared of all articles which may be damaged by felled tree according to organization policy. **Element 3 – Bring down tree** 1) Clear escape route is established at 45 degrees diagonally away from the proposed line of fall. 2) Standard scarf and back-cut is applied to base of tree at level and depth determined by ground conditions and state of canopy and according to enterprise policy. 3) Safe working practices are employed according to OHS requirements. 4) Tools and equipment are cleaned, maintained and stored consistent with manufacturer's specifications and enterprise guidelines. **Element 4 – Clear felled tree from drip site** 1) Appropriate method of clearing the site of felled tree is determined. 2) Machinery required for removal of felled tree is selected and used according to manufacturer specifications. 3) Drop site is cleared of tree and all tree debris. 4) Load to be	**UNIT VARIABLES** **Low hazard environment** means level ground, open space and no overhead power-lines. **Factors influencing the determination of the direction of fall** include weight bias, canopy distribution, degree of lean, topography, and site conditions. **Trees** may include small and medium size with a maximum of 10 meters high and 30 cm trunk diameter at breast height. **Equipment used** may include small chainsaws (maximum 50cc), hand saws and safety equipment. **Site conditions** may include weather conditions, obstructions, distance to obstacles, overhead wires. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to properly implement relevant OHS hazards identification, risk management and risk control measures. 2) Underpinning knowledge and skills include: a. felling considerations relating to weather conditions, position and location of trees; b. identifying weight bias impacting from felling operations; c. potential hazards when felling trees. 3) Ability to determine natural direction of fall, remove obstruction with fall zone, bring down tree, and clear felled tree from drop site. 4) Evidence should include: a. demonstrated understanding of working in accordance with OHS procedures and of the potential implications of disregarding those procedures; b. follow established procedures; c. interpret, understand and act on instructions; d.

removed is secured according to given instructions, using appropriate equipment. 4) Safe work practices specific to felled tree removal from the site are observed at all times.	communicate effectively in the working environment.

APEC SS 2.05.03.05

TRANSPLANT SMALL TREES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare tree for removal 1) All underground services are located according to supply authorities' guidelines. 2) Crown is prepared according to requirements of species, time of removal and enterprise guidelines. 3) Tree and site are watered prior to transplanting. 4) Access is provided to ensure all machinery and equipment is operated without damage to surrounding structures and the tree. 5) Tools and equipment is prepared and used accordingly to supervisor instructions and manufacturer guidelines. **Element 2 – Undertake earthworks for tree removal** 1) Root ball width and depth is selected to ensure root system can colonize new ground according to needs of the species and size of specimen. 2) Root system is prepared and appropriate treatment hygienically applied to ensure viability of tree is maintained according to enterprise guidelines. 3) Root ball is undercut to ensure the ball comes away cleanly and with minimum stress to the tree, according to enterprise guidelines. **Element 3 – Remove tree from original site** 1) Root ball is bound with appropriate material to ensure adequate soil is retained according to enterprise guidelines. 2) Crown is bound and, if required, supported securely to minimize damage during handling and transportation according to enterprise guidelines. 3) Tree is lifted in a manner which ensures minimum damage and stress according to enterprise guidelines. 4) Manual lifting practices are performed according to OHS guidelines. **Element 4 – Install tree in new environment** 1) Drainage is incorporated to ensure root system survival is maintained according to needs of the species and conditions of the planting size. 2) Soil is modified according to the cultural requirements of the species. 3) Tree is planted in prepared planting hole according to enterprise guidelines. 4) Tree supporting devices are installed according to supervisor instructions and/or installation plan. 5) After-care is provided to the tree according to enterprise guidelines. 6) Tools and equipment are cleaned, maintained and stored according to manufacturer specifications and enterprise guidelines.	**UNIT VARIABLES** **Trees to be transplanted** may include shrubs and small trees which can be transplanted by wheelbarrow. **Equipment** may include hand tools, wheel barrows, ropes, jacks, tree frames, tie downs. **Appropriate materials for binding** may include Hessian, sacking, wire frames. **ASSESSMENT GUIDE** 1) Ability to: a. prepare tree for removal, undertake earthworks for tree removal, remove tree from original site, and install tree in new environment 2) Underpinning knowledge and skills include: a. relevant OHS which may impact the performance of this unit; b. factors affecting the timing and method of lifting trees; c. causes of damage and drying-out and their prevention; c. safety procedures and potential hazards associated with lifting trees; d. appropriate knots; e. transplanting practices with different soil types; f. care, maintenance and protection of trees during transplanting operations; g. nutrition and watering requirements for newly transplanted trees. 3) Evidence should include a demonstrated understanding of working in accordance with HSS procedures, and of potential implications of disregarding those procedures. 4) Ability to follow established procedures; interpret, understand and act on instructions; and communicate effectively in the working environment.

APEC SS 2.05.04.05

ESTABLISH PLANTED AREAS

UNIT VARIABLES & ASSESSMENT GUIDE	ELEMENTS & PERFORMANCE CRITERIA
Element 1 – Set out a new site 1) Setting out of the site is consistent with plans and specifications. 2) Tools and equipment are chosen appropriate to the task being undertaken, used in accordance with guidelines and safe working practices are employed. 3) Regulations and legislation relevant to the situation are observed. **Element 2 – Prepare site for planning** 1) Soil samples are collected for a soil analysis where required by supervisor. 2) Requirements to address deficiencies based upon manufacturer specifications and organization guidelines to meet target chemical balances are determined. 3) Area to be planted is thoroughly watered to encourage strong root growth. 4) Plants are laid in the positions described in the garden design or as specified by the supervisor. **Element 3 – Plant site** 1) Plants are planted as they have been placed and with no damage to	**UNIT VARIABLES** The following variable may be present: size of project; design specifications; plans & specifications; tools & equipment; regulations & legislations; soil types; plant types; requirements to address soil deficiencies; organization environmental policy including water usage, fire protection and waste management; pre-planting treatments required; propagation requirements; site characteristics; external agency permits; reporting requirements. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. basic supervision and budgeting; b. delegation of authority; c. interpersonal skills; d. plant reading and interpretation; e. working with a team. 2) Underpinning knowledge and skills include: horticultural

roots or foliage. 2) Newly planted area is watered in accordance with supervisor instructions. 3) Tools are chosen appropriate to the task being undertaken, used in accordance with guidelines and safe working practices are employed. 4) Tools and equipment cleaning and storage procedures are performed and hygiene practices are followed in accordance with organization guidelines.	maintenance; landscape construction; plant communities; plant establishment and after-care; plant identification and biology; plant performance and requirements; planting methods; soil amelioration; statutory/management policies; and weeds, pests and diseases identification and control.

APEC SS 2.05.05.05
PROPAGATE PLANTS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Select propagation materials 1) Parent plant is prepared and collection method employed suitable to species and according to enterprise guidelines. 2) Maximum viability of propagated material is maintained by conditioning and storage according to the requirements of the species. 3) Tools are chosen appropriate to the task being undertaken, used according to enterprise guidelines and wise working practices are employed. **Element 2 – Prepare growing media** 1) Components are prepared according to manufacturer directions, enterprise guidelines propagation method and plant needs. 2) Storage procedures are performed and hygiene practices followed according to enterprise guidelines. **Element 3 – Prepare growing site** 1) Benches are maintained free from contamination and hygiene practices are followed according to enterprise procedures. 2) Growing environment is prepared to suit species and propagation method, and weed retardants are prepared and applied as specified in planting program. 3) Tools are chosen appropriate to the task being undertaken, used according to guidelines and safe working practices are employed. **Element 4 – Implement propagation method** 1) Pre-panting treatment is applied appropriate to the propagation method and species and according to enterprise policy. 2) Placement and depth are according to planting method and species. 3) Plants are handled in a way that minimizes damage. 4) Water and nutrients are applied to suit the media conditions, plant requirements and propagation techniques employed according to supervisor instructions. 5) Labels and identification are ratified and applied according to enterprise guidelines. 6) Remedial actions is taken as specified in planting program to control pests and diseases. 7) Records are completed accurately and at the required time according to enterprise guidelines. 8) Tools are chosen appropriate to the task being undertaken, used according to guidelines and safe working practices are employed. 9) Tools and equipment cleaning and storage are performed and hygiene practices are followed in accordance with enterprise guidelines.	**UNIT VARIABLES** Plant to be propagated may include ornamentals, fruits, nuts, vegetables, herbs, bulbs and fungi. Propagation materials may include: seeds, cuttings, spores, grafted plants, buds, separation/divisions, tissue cultures, rhizomes, plantlets. Growing media may include sand, potting mix, gravel, scoria, rock-wool, gro-wool, sawdust, pine-bark, water/hydroponics. Growing environment may include: temperature, light, humidity, wind, sun, moisture, topography, rainfall. Nutrients may include: removal of infected material, treatment with chemicals. Weed retardants may include: weed-mat, slatted benches, chemical solutions, granular pre-emergent. **ASSESSMENT GUIDE** 1) Critical aspects of assessments: a. nursery and plant hygiene; b. plant identification; c. propagation techniques; d. report writing; e. work as part of a team; f. planning. 2) Underpinning knowledge and skills include: a. media mixing and storage procedures; b. selection of media components for plants species requirements; c. growing environments and weed retardants for propagated material; d. pre-planting treatments, water and nutrients for propagated material; e. remedial action for weeds, pests and diseases; f. all forms and techniques for propagation; g. OHSS issues that impact upon the performance of this unit. 3) Ability to select propagation materials, prepare growing media, prepare growing site, and implement propagation method.

APEC SS 2.05.06.05
PRUNE SHRUBS AND SMALL TREES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify pruning requirements 1) Pruning requirements are established based on sound horticultural practices and consistent with consistent with enterprise policy and guidelines. 2) Plants requiring pruning are identified. 3) Types of pruning required is determined according to supervisors instructions. 4) Appropriate tools and equipment required for pruning are identified. 5) Access to site is determined in consultation with the field supervisor. 6) Disposal of waste materials is determined according to enterprise policy. **Element 2 – Prepare for pruning** 1) Pruning tools and equipment is selected in accordance with	**UNIT VARIABLES** **Pruning requirements** may include pruning for shape; fruit & flower production; health and vigor; clearance for services and access. **Types of pruning** may include formative and corrective; preventive; ornamental pruning; canopy lifting; thinning; reduction; or management. **Pruning techniques** may include removal of damaged, diseased and dead wood or flowers and foliage. **Equipment used** may include chipper, small chainsaw, ropes, handsaw, and secateurs. **Ground pruning** may be undertaken by hand tools or chainsaws.

location, access and size of material to be pruned. 2) Safety equipment and personal protective equipment is prepared in line with pruning task requirements.	**ASSESSMENT GUIDE**
Element 3 – Undertake pruning of trees and shrubs	1) Evidence should include demonstrated capacity to: a. determine pruning requirements; b. plan for pruning; c. undertake pruning of trees and shrubs; d. plant identification; e. chainsaw use; f. communication skills; g. observation and analysis; h. compliance to OHS; i. pruning for formative shaping, to improve health & vigor, and CODIT guidelines.
1) Plant material to be removed is identified according to pruning programs requirements. 2) Branches are cut according to established horticulture practice. 3) Tools and equipment are used according to supervisor instructions and manufacturer guidelines. 4) Disposal of waste materials is completed according to enterprise policy. 5) Site is cleaned and made good on completion of pruning activities.	2) Underpinning knowledge and skills include: a. principles and methods of pruning to achieve given objectives; b. effects on plant growth and habit by pruning operations; c. principles relating to the choice and use of equipment for pruning; d. relevant OHS hazards identification, risk management and risk control measures.

APEC SS 2.05.07.05

IMPLEMENT A LANDSCAPE MAINTENANCE PROGRAM

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Maintain plant protection devices	**UNIT VARIABLES**
1) Protection devices are checked for their effectiveness according to protection plan requirements. 2) Broken, damaged, or ineffective components are reported and/or repaired according to terms and conditions of contract. 3) Protection devices are dismantled and removed according to protection plan requirements.	Equipment used includes spraying equipment, safety equipment, mowers, cutting/digging/chipping equipment and machineries, and hand tools.
Element 2 – Replaced diseased or damaged plants	Maintenance program can incorporate mowing, pruning, weeding, plant replacement, minor structural repairs, spraying, fertilizing, pest control, cleaning, adjustment /programming irrigation systems, top soiling, and rubbish removal.
1) Diseased or damaged plants are identified and recorded according to enterprise guidelines. 2) Plants which are to be replaced are removed and new specimens installed in their place according to maintenance program specifications. 3) Diseased and damaged plants which are beyond the scope of the maintenance program are reported to the nominated person. 4) Aftercare is provided to established plants to ensure their health and vigor is maintained according to enterprise guidelines.	
Element 3 – Maintain landscape areas	**ASSESSMENT GUIDE**
1) Standard and scope of maintenance is established according to maintenance program. 2) Site is regularly inspected for remedial actions and repairs according to maintenance contract conditions. 3) Remedial actions and repairs are implemented to restore site to full effectiveness according to maintenance contract conditions. 4) Results of operations are assessed to ensure repairs or renovation objectives and standards have been achieved according to maintenance program details. 5) Surroundings are returned to tidy and undamaged condition following operations according to enterprise guidelines. 6) Work performances of others are monitored and remedial action undertaken to ensure terms and conditions of the contract are maintained.	1) Underpinning knowledge and skills include: a. appropriate horticultural practices for heritage and cultural areas; b. principles and applications of an integrated pest management program; c. actions permitted in the event of variations to maintenance contracts; d. sources of hazards encountered in landscape maintenance and measures for their reduction 2) Ability to maintain plant protection devices, replace diseased/damaged plants and maintain landscaped areas.

EMPOWER Associates for APEC TWG / 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.06 - MAINTENANCE AND ENGINEERING (09 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Elmts	Total PC
2.06.01.05	Operate equipment and machineries	3	5+3+6 = 14
2.06.02.05	Operate operational vehicles	3	3+4+1 = 8
2.06.03.05	Carry our vehicle maintenance and minor repairs (idem 4.03.xx.05)	4	2+2+3+1 = 9
2.06.04.05	Carry out specialist maintenance & construction	7	7+4+3+4+5+5+4 = 32
2.06.05.05	Carry out ground maintenance	5	8+6+4+2+3 = 23
2.06.06.05	Carry out general maintenance	5	8+4+3+2+3 = 20
2.06.07.05	Supervise machinery maintenance	3	2+4+3 = 9
2.06.08.05	Supervise maintenance operations.	7	5+3+5+6+4+4+4 = 31
2.06.09.05	Monitor pool water quality	9	4+2+2+5+1+1+1+4+1 = 21
	Total 09 units	**46**	**167**

APEC SKILL STANDARD UNITS CHAPTER 2.06 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.06.01.05
OPERATE EQUIPMENT AND MACHINERY

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Operate equipment and machineries 1) Equipment or machinery is selected according to designated task. 2) Equipment or machinery is calibrated for the designated task. 3) Equipment or machinery is operated safely and effectively to operation requirements and manufacturer recommendations. 4) Damage, wear or malfunctions are corrected and/or reported in accordance with operational requirements and manufacturer recommendations. 5) Equipment and machinery is cleaned and stored after use according to enterprise standard and manufacturer recommendations. **Element 2 – Operate stationary equipment** 1) Pre-start checks of equipment or machineries for condition and designed operation is performed prior to starting. 2) Damage, wear, faults or malfunctions are identified and corrected / reported according to operational requirements and manufacturer recommendations. 3) Equipment used is recorded according to enterprise standards/operational requirements. **Element 3 – Operate independently powered tools** 1) Pre-start checks of power tools are completed in line with manufacturer recommendations. 2) Manufacturer and workplace OHS requirements are followed to maximize operator/colleagues / customers safety. 3) Unsafe and faulty tools are identified and segregated for repair or replacement. 4) Tools are prepared to use in line with industry standards and manufacturer recommendations. 4) Tools are prepared to use in line with industry standards and manufacturer recommendations. 5) Tools and equipment are operated safely and efficiently to workplace requirements. 6) Tools are cleaned and stored after use as specified.	**UNIT VARIABLES** **Equipment** may include: fork-lifts, hydraulic equipment, stationary engines, pumps, irrigation equipment, excavators, spraying equipment, hedging machines, solar & wind powered equipment, elevated work platforms, cherry pickers, scissor lifts, and chippers. **Preparation of powered tools** may include sharpening, priming pimps, cleaning filters, general cleaning. **Some equipment** may require additional licensing. **Operating methods** may include those for turbo-charged engines. **Storage, maintenance and operation conform to** relevant OHS legislation. **Records** may be paper-based or electronically processed. **ASSESSMENT GUIDE** 1) Evidence should include: a. required license and permits; b. operating equipment in a range of conditions; c. emergency procedures in the operation of equipment and machineries. 2) Underpinning knowledge and skills include: basic work knowledge such as OHS procedures for equipment used, enterprise procedures for various equipment, and OHS requirements for storage of materials and equipment. 3) Ability to operate machineries and equipment, either mobile or stationary; and independently powered tools.

APEC SS 2.06.02.05
OPERATE OPERATIONAL VEHICLES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Operate vehicles 1) Vehicles are correctly, safely and efficiently operated. 2) Passengers (if applicable) are advised of any special safety precautions. 3) Passengers (if applicable) and the public safety are considered throughout the operation. **Element 2 – Perform maintenance and minor repairs on vehicles** 1) Maintenance systems including spares and fluids are correctly selected / accessed prior to operation. 2) Vehicles are regularly checked prior to and during operation. 3) Maintenance and repair tasks are correctly performed according to enterprise procedures and manufacturer instructions. 4) Vehicles performance reports are promptly made in accordance with enterprise procedures. **Element 3 – Complete documentation** 1) Records and routine maintenance and repairs are promptly made and kept in accordance with enterprise procedures.	**UNIT VARIABLES** **Routine maintenance/ repair tasks** include: changing wheels/gears, puncture repairs, bleeding of engines. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity to: a. ability to safely and correctly use the features of operated vehicle; b. ability to safely apply recovery techniques to vehicles; c. ability to apply maintenance and repair techniques to operated vehicles; d. knowledge of relevant OHS issues. 2) Underpinning knowledge and skills include: a. features and handling operated vehicles; b. differences between 2 WD and 4 WD vehicles and their impacts in operation and capability; c. relevant OHS issues.

APEC SS 2.06.03.05

CARRY OUT VEHICLE MAINTENANCE AND MINOR REPAIRS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Diagnose faults and undertake minor repairs for the safe operation of vehicles 1) Faults in the vehicle electrical system are identified, diagnosed and repaired following manufacturer specifications and company procedures. 2) Faults in the fuel system are identified, diagnosed and repaired following manufacturer specifications and company procedures. **Element 2 – Maintain the vehicle systems** 1) Fluid levels are checked and adjusted following manufacturer specifications and company procedures. 2) Air levels are checked and adjusted following manufacturer specifications and company procedures. **Element 3 – Carry out minor repairs to vehicles** 1) Vehicle components are removed, repaired or replaced and refitted to the vehicle using the correct tools and following manufacturer specifications and company procedures. 2) Tires are repaired or replaced on vehicle following manufacturer specifications and company procedures. 3) The need for more complex maintenance procedures is identified and the problem correctly referred following manufacturer specifications and company procedures. **Element 4 – Complete documentation** 1) Records and routine maintenance and repairs are promptly made and kept in accordance with enterprise procedures.	**UNIT VARIABLES** **Types of vehicles** include all transport vehicles. **Types of minor repairs** include replacement of headlights, door mirrors, coolant hose, fan belt, fuse, rear tail-light lens, tires, and repair of tire puncture. **Types of service** include replacement of oils and replacement of air in tires. **Supervision** may be limited or minimum supervision. **ASSESSMENT GUIDE** Evidence should include demonstrated capacity and underpinning knowledge in: a. OHS requirements; b. inspection procedures; c. service procedures; d. operation of electrical system; e. operation of fuel system; f. basic fault finding procedures; g. reporting and documenting; h. ability to use and maintain required materials, tools, and parts; i. recognition and diagnosis of faults and vehicle irregularities; j. ability to work under minimum supervision; k. ability to minimize waste.

APEC SS 2.06.04.05

CARRY OUT SPECIALIST MAINTENANCE AND CONSTRUCTION

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Perform specialist maintenance tasks 1) A prompt response is made to requests for maintenance assistance. 2) Specialist maintenance and construction is correctly performed according to established trade practice and safety standards. 3) Contact is established and maintained with other specialist trades people where appropriate to ensure effective and efficient co-ordination of tasks within an overall project. 4) Relevant colleagues are kept informed of work progress and any changes to schedule. 5) Completed work meets quality requirements. 6) Work is completed within the allocated budget. 7) Work is conducted in a manner which causes minimum disruption to customer and colleagues. **Element 2 – Supervise trade assistants** 1) Trade assistants are given clear work instructions. 2) Understanding is checked before work commends. 3) The quality of work is monitored and remedial action taken where necessary. 4) Assistance from maintenance supervisors is sought where appropriate. **Element 3 – Maintain supplies and equipment** 1) Specialist supplies are monitored to ensure continuity of supply. 2) Additional supplies are ordered within time parameters which prevent delay to maintenance and construction work. 3) Equipment is checked and action taken to initiate any repairs so that impact on progress of work is minimized. **Element 4 – Carry out administrative procedures** 1) Work report forms are accurately completed and forwarded to the appropriate area in the required timeframe. 2) Order forms are accurately completed and processed according to company policy and procedures. 3) Statutory documents are correctly completed and forwarded to authorities within the required timeframe. 4) Labor and equipment costs are correctly estimated and supplied to the appropriate supervisor as required. **Element 5 – Identify and resolve maintenance and construction problems** 1) Problems which fall within the area of expertise are promptly identified and action initiated to resolve the situation. 2) Colleagues are informed of the nature of the problem and the course of action to be taken. 3) Safety issues are identified and reported according to company policy and procedures. 4) The need for specialist assistance is identified. 5) Specialist assistance is organized according to company policy and procedures. **Element 6 – Coordinate contractors** 1) Problems requiring specialists are identified. 2) Specialist maintenance contractors are employed	**UNIT VARIABLES** Specialized trade may include: mechanics, carpenters & builders, electronic technicians, audio visual, pyro-technicians, fitters & turners, plumbers, electricians, marine mechanics, fibre glassers, gardeners, painters & decorators, locksmiths, and filtration technicians. Maintenance operations may be for the following areas: equipment, pools, vehicles, grounds & gardens, buildings, gates & fences, amenities, podiums etc. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated skills and knowledge in: a. customer service skills; b. enterprise safety and emergency procedures; c. general knowledge of the industry; d. relevant OHS issues. 2) Look for: a. ability to integrate technical trade skills with the requirements of workplace facilities; b. ability to

according to enterprise policy. 3) Specialists are accurately informed of job specifications. 4) Contractors are monitored to ensure that the work is carried out according to specifications. 5) Administrative requirements for contracted work are correctly completed within the appropriate timeframe.

Element 7 – Report on activities

1) Maintenance activities are reported to the appropriate person in stages according to maintenance progress and company policy and procedures. 2) Records and routine maintenance and repairs are promptly made and kept in accordance with enterprise procedures.

communicate effectively with trades people, colleagues and customer; c. ability to coordinate and monitor specific construction and maintenance projects to meet enterprise timelines.

APEC SS 2.06.05.05
CARRY OUT GROUNDS MAINTENANCE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Perform routine gardening activities 1) Routine gardening activities are correctly carried out under direction from the supervisor. 2) Proven gardening techniques are correctly used. 3) Correct clothing is worn according to type of work being completed and prevailing conditions. 4) Tasks are carried out according to schedule. 5) Minimum disruption is caused to the customers. 6) Completed work meets quality requirements. 7) Work areas are cleaned at completion of work. 8) Problems requiring specialist assistance are identified and help is sought from the appropriate supervisor. **Element 2 – Monitor the appearance and quality of grounds and gardens** 1) Sickly and unsightly plants are identified and removed or treated. 2) Grounds are kept free of litter. 3) Lawns are kept in condition as specified by the enterprise. 4) Beds and lawns are kept free from weeds. 5) Hazards are identified and action taken promptly within the scope of individual responsibility. 6) Ways of improving grounds and gardens presentations are identified and suggested to the appropriate supervisor. **Element 3 – Use and care for equipment** 1) Problems or faults are identified and reported to the appropriate personnel. 2) Basic maintenance is carried out on gardening equipment according to company practice. 3) Equipment is stored in the designated area. 4) Equipment is stored safely according to manufacturer specifications and OHS. **Element 4 – Assist in special gardening projects** 1) Work on special projects is correctly carried out under the direction from the appropriate specialist or supervisor. 2) Liaison with other project members is undertaken to ensure effective coordination of tasks in the total project. **Element 5 – Liaise with contractors** 1) Contact is established and maintained with appropriate contractors to ensure effective coordination of maintenance work. 2) Assistance and information is provided to contractors when required. 3) Accurate information is relayed between contractors and maintenance supervisors when required.	**UNIT VARIABLES** Routine gardening tasks may include: mowing, weeding, pruning, planting & sowing, spraying. Gardening projects may include: new flower/plant beds, landscaping, planting, moving plants & trees. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated capacity in: a. customer service skills; b. safety and emergency procedures related to ground maintenance; c. technical/equipment procedures for commonly used equipment in grounds maintenance; d. chemical usage in grounds maintenance; e. basic gardening techniques; f. basic plants knowledge; g. environmental issues and regulations affecting grounds maintenance. 2) Look for: a. ability to correctly and safely operate gardening equipment; b. ability to perform a range of routine grounds maintenance tasks within enterprise acceptable timeframes; c. knowledge of general procedures and requirements that apply to grounds maintenance work.

APEC SS 2.06.06.05
CARRY OUT GENERAL MAINTENANCE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Perform maintenance tasks 1) Prompt response is made to requests for maintenance assistance. 2) Maintenance tasks are carried out correctly, promptly, in accordance with company policy and procedures. 3) Tasks are carried out according to schedule. 4) Tasks are carried out with minimum disruption to customers. 5) Work areas are enclosed where appropriate to ensure safety to customers. 6) Completed work meets quality requirements. 7) Work areas are cleaned at completion of work. 8) Problems requiring specialist assistance are identified, and help is sought from the appropriate tradesperson or supervisor. **Element 2 – Use and care for equipment** 1) Problems or faults are identified and reported to appropriate personnel. 2) Basic maintenance is carried out on equipment on a regular basis according to company procedures and practice. 3) Equipment is stored in the designated areas. 4) Equipment is stored safely according to manufacturer specifications and OHS.	**UNIT VARIABLES** Maintenance tasks may include: simple repairs, servicing equipment, painting & decorating, minor demolition. Special projects may include: construction of new building/attractions, landscaping, major demolition. **ASSESSMENT GUIDE** 1) Evidence should include demonstrated skills and knowledge in: a. customer service skills; b. safety and emergency procedures

Element 3 – Perform administrative tasks	related to general maintenance activities; c. technical/equipment procedures for commonly used maintenance tools and equipment.
1) Maintenance request forms are accurately interpreted. 2) Instructions are clarified with the person making the request, when required. 3) Work report forms are accurately completed and forwarded to the appropriate person.	
Element 4 – Assist in special projects	2) Ability to safely and correctly use equipment; ability to perform a range of routine maintenance tasks within company acceptable timeframes; knowledge of general procedures and requirements that apply to routine maintenance work.
1) Work on special projects is correctly carried out under direction from the appropriate specialist or supervisor. 2) Liaison with other project members is undertaken to ensure effective coordination of tasks in the total project.	
Element 5 – Liaise with contractors	
1) Contact is established and maintained with appropriate contractors to ensure coordination of maintenance works. 2) Assistance and information is provided to contractors when required. 3) Accurate information is relayed between contractors and maintenance supervisors when required.	

APEC SS 2.06.07.05

SUPERVISE MACHINERY MAINTENANCE

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine maintenance requirements	**UNIT VARIABLES**
1) Maintenance problems are identified from operational diaries, employee's comments and/or personal testing and observation. 2) Likely causes of problems are determined and appropriate action is taken.	Appropriate action may include: obtaining information from a variety of resources, solving problems, and eliminating causes.
	Resources may include: labor, equipment, materials.
Element 2 – Schedule resources	Maintenance may include: preventive, corrective or breakdown.
1) Resources required to carry out maintenance are determined according to organization requirements. 2) Maintenance supplies are purchased according to scheduled requirements. 3) Maintenance is scheduled to suit total property operations. 4) Maintenance requirements are communicated to staff for action.	Maintenance may be performed on property improvements, plant, machinery and equipment.
	Maintenance requirements may include: extent of work, parts to be used, quality of repair.
	Staff may include self, full time, part time, casual or permanent employees, contractors, professionals.
Element 3 – Monitor maintenance procedures	**ASSESSMENT GUIDE**
1) Maintenance work is monitored to ensure property production operations are not interrupted. 2) Costs are controlled to meet organization budgets. 3) Documentation for maintenance is recorded according to organization requirements.	1) Evidence should include demonstrated knowledge of machinery and ability to apply that knowledge to a specific working environment.
	2) Underpinning knowledge and skills include: a. scope and range of company machinery and equipment; maintenance needs and related activities; scheduling of maintenance works; communication systems for notifications and recording of maintenance; techniques of evaluating maintenance procedures; cost-benefit of out-sourcing maintenance activities.
	3) Ability to determine maintenance requirements; schedule resources; monitor maintenance procedures and progress.
	4) Evidence of interpersonal skills, observation & analysis; and resource allocation.

APEC SS 2.06.08.05

SUPERVISE MAINTENANCE OPERATIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLE & ASSESSMENT GUIDE
Element 1 – Monitor regular maintenance	**UNIT VARIABLES**
1) All physical assets are regularly checked to ensure safety and efficient operation. 2) Need for maintenance is identified and work initiated. 3) Contact is established and maintained with trades people and trade assistants in area of responsibility. 4) Informal updates and suggestions for improvements to maintenance systems are requested. 5) Quality checks on maintenance work are performed regularly and appropriate action taken.	Specialized trade areas to be supervised may include: mechanics, carpenters & builders, electronic technicians, audio visual, pyro-technicians, fitters & turners, plumbers, electricians, marine mechanics, fibre glassers, gardeners, painters & decorators, locksmiths, and filtration technicians.
Element 2 – Ensure supply of materials for regular maintenance	Maintenance operations may be for the following areas: equipment, water operations, vehicles, grounds & gardens, building, animal enclosures, gates & fences, amenities, theatres/stages/podiums.
1) Supplies of materials and equipment are monitored. 2) Additional materials and equipment are ordered where required within required time frames to minimize delays in completion of work. 3) Materials and equipment are supplied within budget.	
Element 3 – Deal with maintenance and construction problems	
1) Problems are promptly identified and considered from an operational and customer service perspective. 2) Short term action is initiated to resolve the immediate problem where appropriate. 3) Problems are analyzed for any long term impact and potential	

	ASSESSMENT GUIDE
solutions are assessed and acted upon in consultation with relevant colleagues. 4) Where problems are raised by team members, they are encouraged to participate in solving the problem. 5) Follow up action is taken to monitor the effectiveness of solutions in the workplace.	1) Evidence should include demonstrated skills and knowledge in: a. project planning related to maintenance operations; b. control systems related to maintenance and construction activities; c. related legal issues; d. problem solving and decision making.
Element 4 – Coordinate maintenance projects	
1) Maintenance and construction projects are planned and scheduled in consultation with maintenance colleagues and management. 2) Plans and schedules take account of the needs for minimum disruption to customers. 3) Project budgets are accurately prepared and submitted for approval. 4) Materials and equipment are obtained within required time frames. 5) Projects are monitored. 6) Progress against budget is monitored and reported to management.	2) Look for ability to plan and monitor a range of maintenance and construction projects; ability to develop, monitor and administer maintenance systems including those relating to equipment, supplies, preventive activities and coordination of contractors; ability to understand how maintenance and construction activities fit into the overall operation of the workplace.
Element 5 – Coordinate contractors	
1) Problems requiring specialists are identified. 2) Specialist maintenance contractors are employed according to enterprise policy. 3) Specialists are accurately informed of job specifications. 4) Contractors are monitored to ensure that the work is carried out according to specifications.	
Element 6 – Administer maintenance and constructions	
1) Maintenance and construction records and inventory are accurately maintained and provided to management when required. 2) Information is obtained from trades people within required timeframe. 3) Maintenance reports are developed and presented to management. 4) Reports are accurate, clear and concise.	
Element 7 – Provide maintenance and construction advice to management	
1) Material and labor costs are estimated and submitted to management on request. 2) Accurate progress reports on maintenance and construction projects are provided to management. 3) Suggestions for improvement in maintenance operations are made to management. 4) Management takes account of feedback from maintenance personnel.	

APEC SS 2.06.09.05

MONITOR POOL WATER QUALITY

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Test water	**UNIT VARIABLES**
1) Testing of water is carried out on a regular basis according to enterprise procedures. 2) Water is tested for PH level, total alkalinity and chlorine levels. 3) Levels are accurately read and compared to prescribed levels. 4) Special problems are identified.	**Pools include** swimming pools/spas, animal pools, water ride pools, decorative pools and fountains
Element 2 – Monitor pumps and filtration equipment	Testing may be by a range of methods including: chemical testing, probes, and electronic meters.
1) Pumps and filtration equipment are tested on a regular basis according to enterprise procedures. 2) Filters are changed and cleaned on a regular basis according to enterprise procedures.	
Element 3 – Deal with water problems	**ASSESSMENT GUIDE**
1) Special water quality problems are accurately diagnosed and appropriate treatment is determined. 2) Problems requiring specialist assistance are identified.	1) Look for: a. ability to correctly and safely operate equipment; b. ability to perform a range of water quality-related tasks within enterprise acceptable timeframes; c. knowledge of general procedures and requirements that apply to the monitoring of water quality.
Element 4 – Top up chemicals	
1) Top-up chemical requirements are identified accurately and carefully measured. 2) Chemicals are distributed to pools at correct time and in correct quantities according to enterprise practices. 3) Chemicals are lifted and carried using correct filling techniques and appropriate equipment. 4) Hazardous chemicals are identified and handled with care, according to OHS guidelines. 5) Appropriate protective clothing is worn when handling chemicals.	2) Underpinning knowledge and skills include: a. government regulations regarding water maintenance and disposal; b. OHS requirements in relation to storage and handling of chemicals, and the lifting of heavy articles; c. knowledge on the risks of water quality and chemicals to human and environment.
Element 5 – Test discharge	
1) Discharge to be drained off is tested to ensure it complies with local and environmental regulations.	
Element 6 – Monitor water volumes	
1) Water volumes are tested regularly to ensure that damage to filtration systems is avoided and efficiency of pumps is maintained.	
Element 7 – Carry out minor maintenance and plumbing	
1) Faults and problems requiring routine maintenance are rectified, including: minor plumbing; removing and repairing underwater lighting; and dredging.	
Element 8 – Coordinate contractors	

1) Problems requiring maintenance specialists are identified. 2) Specialist maintenance contractors are employed according to enterprise policy. 3) Specialists are accurately informed of specifications of the job. 4) Contractors are monitored to ensure that the work is carried out according to specifications.	
Element 9 – Undertake manual cleaning	
1) Manual cleaning is carried out regularly and according to enterprise policy, including removing leaves & debris and vacuuming.	

EMPOWER Associates 2005

APEC SKILL STANDARD UNITS
2005

CHAPTER 2.07 - SS TRAINING, ASSESSMENT AND APPLICATION (16 Units)

SUMMARY OF UNITS

Unit code	Unit Name	Elmts	Total PC
2.07.01.05	Train small groups	4	3+ 5+2+5 = 15
2.07.02.05	Plan and promote a training program	4	4+6+4+3 = 17
2.07.03.05	Plan a series of training sessions	5	5+6+6+6+5 = 28
2.07.04.05	Deliver training sessions	5	6+5+11+4+5 = 31
2.07.05.05	Review training	3	2+6+1 = 9
2.07.06.05	Design training courses	7	6+2+4+3+4+2+2 = 23
2.07.07.05	Plan SS assessment	4	5+3+4+4 = 16
2.07.08.05	Conduct SS assessment	8	6+3+3+4+4+2+3+3 = 28
2.07.09.05	Review SS assessment	3	4+3+3 = 10
2.07.10.05	Develop SS based assessment procedures	5	9+12+3+7+4 = 35
2.07.11.05	Develop SS based assessment tools	6	6+4+5+3+4+2 = 24
2.07.12.05	Design and establish SS based training system	7	3+2+2+5+1+3+6 = 22
2.07.13.05	Design and establish SS based assessment system	8	4+4+2+3+5+2+3+6 = 29
2.07.14.05	Manage the SS based training & assessment system	5	4+5+3+3+5 = 20
2.07.15.05	Evaluate the SS based training & assessment system	4	8+2+2+2 = 14
2.07.16.05	Analyze SS requirements (idem 2.03.xx.05)	5	4+6+3+3+4 = 20
	TOTAL 16 UNITS	83	341

ABBREVIATIONS

TERMS	DESCRIPTION
LLN	Language, Literacy and Numeracy
GQL	General Qualification Level
EJL	Enterprise Job Level
RCPP	Remuneration and Career Path Progression
EEO	Equal Employment Opportunity
SoA	Statement of Attainment
SSBT	SS Based Training
OHSS	Occupational Health, Safety and Security
OHS	Occupational Health and Safety

APEC SKILL STANDARD UNITS CHAPTER 2.07 - DETAILED DESCRIPTION OF UNITS

APEC SS 2.07.01.05
TRAIN SMALL GROUPS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare for training 1) Specific needs for training are identified and confirmed through consultation with appropriate personnel. 2) Training objectives are match to identified skills development needs. 3) Training approaches are planned and documented. **Element 2 – Deliver training** 1) Training is conducted in a safe and accessible environment. 2) Training delivery methods are selected according to participant needs, trainer availability, location and resources. 3) Strategies and techniques are employed which facilitate the learning process. 4) Objectives of the training, sequence of activities and assessment processes are discussed with training participants. 5) A systematic approach is taken to training and the approach is revised and modified to meet specific needs of training participants. **Element 3 – Provide opportunities for practice** 1) Practice opportunities are provided to ensure that the participants achieve the components of the skills. 2) Various methods for encouraging learning are implemented to provide diverse approaches to meet the individual needs of participants. **Element 4 – Review training** 1) Participants are encouraged to self evaluate performance and identify areas for improvement. 2) Participants readiness for assessment is monitored and assistance provided in the collection of evidence of satisfactory performance. 3) Training is evaluated in the context of self assessment and measurements against objectives. 4) Training details are recorded according to enterprise and legislative requirements. 5) Results of evaluation are used to guide further training.	**UNIT VARIABLES** **Relevant information to identify training needs** includes: 1) Industry/enterprise or other workplace SS. 2) Endorsed components of relevant industry training packages. 3) Industry/workplace training practices. 4) Job descriptions. 5) Business plan of the organization which identifies skill development requirements. 6) Results of training needs analysis. 7) Workplace SOP; 8) GQL/EJL/RCPP **Appropriate personnel** may include: 1) Team leader/supervisor/technical experts. 2) Managers/employees. 3) Training and assessment coordinators. 4) Training participants. 5) Representative government regulatory bodies. 6) Union/employee representatives. 7) Consultative committees. 8) Assessors. **Training methods and opportunities for practice** may include: presentations, demonstrations, explanations, problem solving, mentoring, experiential learning, group work, on the job coaching, job rotation, or a combination of the above. **Components of skills** may include: task skills, task management skills, contingency management skills, job/role environment skills, transfer & application of skills and knowledge to new contexts. **Characteristics of training participants** include the following information related to: 1) Language/literacy/numerical needs. 2) Cultural, language, educational background. 3) Gender. 4) Physical ability. 5) Level of confidence, nervous or anxiety. 6) Age. 7) Previous experience with topics. 8) Experience in training and assessment. **Training sessions** may include: one to one demonstration or small group demonstration (2-5 persons). **Training Resources** may include: time, location, personnel, materials & equipment, OHSS and others, enterprise/industry SOP, finance/costs. **Strategies and techniques** may include: active listening, targeted questioning, points of clarification, group discussions. **ASSESSMENT GUIDE** 1) **Ability to provide evidence of the following products**: a. description of the specific training needs and the required skills outcomes; b. outline of the training approach and steps to be followed; c. description of training participants and delivery methods to be used; d. specific resources required; e. outlines of the evidence to be collected for monitoring training participants progress; f. trainer's self assessment of training delivery; g. participant evaluation of training delivery; h. evaluation of review comments against plan of training; i. records/documentation for monitoring progress of training participants. **All above evidence may be collected using performs or templates.** 2) **Ability to provide evidence of the following processes**: a. how the specific training need was determined; b. how the sequence of the training was determined; c. how appropriate personnel were identified; d. why particular delivery methods were selected; e. how the characteristics of participants were identified; f. how the resources requirements were established; g. how participant progress was monitored; h. why and how the training resources were selected; i. how appropriate personnel confirmed training arrangements; j. how the participants were informed of: intended training outcomes, skills to be achieved, off/or the job practice opportunities, benefits of practices, learning activities and tasks, assessment tasks; k. consistency in performance. All above evidence may be provided verbally or in written form. 3) Required knowledge and skills: a. skills in the unit being trained; b. workplace application of the relevant skills; c. identification of evidence of skills; d. planning own work including predicting consequences and identifying movements; e. application of relevant workplace policies and government regulations; f. correct use of equipment, process and procedures; g. ethical handling performance issues; h. language, literacy and numerical issues related to training; i. communication skills appropriate to the culture of the workplace; j. SSBT/GQL/EJL/RCPP.

APEC SS 2.07.02.05
PLAN AND PROMOTE A TRAINING PROGRAM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify competency needs 1) The client, target group and appropriate personnel are identified and required goals and outcomes of the training program are negotiated and confirmed with the client. 2) Relevant skills or other performance standards for the target group are obtained and verified with appropriate personnel. 3) Gaps between the required skills and current skills of the target group are determined. 4) Current skills and any relevant characteristics of each participant in the target group are identified using appropriate investigation methods. **Element 2 – Document training program** 1) Training program goals are identified to specify required knowledge and skills and links to specified units of skill qualification and/or other performance standards. 2) Training program documentation specifies the range of workplace applications, activities and tasks that must be undertaken to develop the requisite skills. 3) Available training programs and resources are customized to meet specific client needs where required. 4) Appropriate grouping of activities is identified to support formative and summative assessments. 5) Overview of training sessions including appropriate timing and costs is prepared and confirmed with appropriate personnel including those relating to language, literacy and numerical issues. 6) Methods of supporting and guiding participants within the target group are identified and specified. **Element 3 – Identify program resources** 1) Resources required for the program are identified and approved by appropriate personnel and allocated to meet training participants characteristics. 2) A safe and accessible training environment is identified and arranged to support the development of competencies. 3) Arrangements are made with personnel required to support training program. 4) A Register of training resources is maintained and held in accessible format. **Element 4 – Promote training** 1) Advice on the development of the training program is provided to appropriate personnel. 2) Information on planned training events is made widely available, utilizing a variety of methods. 3)	**UNIT VARIABLES** **Training programs** is a collection of training activities to develop skills of a target group where Client provides the approvals for expenses of training resources. **Target group** may include: in-service employees or groups/individuals with special training and/or recognition needs. **Training** may be: on the job, simulated setting, classes, a combination of locations to suit the SS being trained, in a singe or multi-side operations. **Clients** may include: a department/division, a work area, or an enterprise/organization. **Client's needs** may include: 1) Increased productivity. 2) Increased enterprise profitability. 3) Attainment of specified industry or enterprise skills. 4) Achievement of community priorities. 5) Achievement of government priorities. 6) Licensing or accreditation requirements, GQL/EJL/RCPP **Information for training** may be collected from: 1) Industry/enterprise or other workplace SS. 2) Licensing requirements. 3) Discussions with clients. 4) Job descriptions. 5) Business plan of the organization which identifies skill development requirements. 6) Enterprise skills audit report. 7) Workplace SOP. 8) Benchmarking report. 9) Industry report/publications. 10) Labor market needs analysis. 11) Government reports. **Training Program may be based on**: National Industry Training Packages, Enterprise Training Packages, Agreed curriculum, International Standards, GQL, EJL, RCPP **Target group skills may be identified** by: 1) Matching enterprise/client needs to available National Training Packages. 2) Reports on Assessment of SS. 3) Enterprise training and assessment record keeping system. 4) Self, peer or supervisor reports. **Appropriate personnel** may include: 1) Team leader/supervisor/technical experts. 2) Managers/employees. 3) Participants/employees/students/learners. 4) Technical experts including language/literacy/numerical experts. 5) Representative government regulatory bodies. 6) Union/employee representatives. 7) Consultative committees. 8) Users of the training information. 9) Trainers/Lecturers/Teachers/ Assessors. **Training program delivery** may involve: enterprise/workplace, training provider, community based, school based, international/regional programs, a combination of the above. **Characteristics of training participants** include the following information related to: 1) Language/literacy/numerical needs. 2) Cultural, language, educational background. 3) Gender. 4) Physical ability. 5) Level of confidence, nervous or anxiety. 6) Age. 7) Previous experience with topics. 8) Experience in training and assessment. **Training delivery methods** may include: face to face; distance learning; trainer centered/participant centered; Lock Step/Partly Self Paced/All Self Paced; Real time/Time Independent; Place Dependent/Place Independent; interactive, mentoring; active learning; coaching. **Training materials** may include: Non-endorsed components of a training packaged; work books; workshop guides; background readings/references; handouts; industry/enterprise SOP; supportive policies and legislation. **ASSESSMENT GUIDE** 1) **Evidence of the following products to be collected**: a. description of clients, target groups, and appropriate personnel; b. analysis of training needs of target group; c. documentation on consultations with appropriate personnel throughout the development phase; d. outline of training program goals and supporting documents for achievement of program goals; e. documentation on training resources. 2) **Evidence of the following processes to be collected**: how client/target groups/appropriate personnel were identified; b. how required competencies were determined to meet the client's needs; c. why there is a need for training opposed to other non-training alternatives; d. how the need for training was verified with appropriate personnel; e. how appropriate personnel approved training program resources; f. how language/literacy/numerical issues were taken into considerations of the planning process. 3) **Required skills and knowledge**: a. Understand SS Based training and assessment; b. relevant SS and industry/enterprise SOP; c. relationships between SS to Enterprise Job Levels (EJL), General Qualification Level, and Remuneration and Career Path Progression

Promotional activities are monitored for effectiveness in collaboration with the client and appropriate personnel.	(RCPP); d. understanding of principles of adult learning and SS Based Training (SBT); e. identification and correct use of equipment, processes and procedures relevant to the SS unit(s); f. knowledge of training needs analysis and planning; g. sources of special training assistance such as language/literacy/numerical issues); h. planning own work including predicting consequences and identifying improvements; i. appropriate and related communication skills; j. calculate and estimate costs, time and length of training sessions and resources.

APEC SS 2.07.03.05

PLAN A SERIES OF TRAINING SESSIONS* (to fill in gaps in SS)

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify training requirements 1) Current skills of the target group are identified. 2) Relevant training packages is obtained where applicable. 3) Qualification requirements, SS or enterprise/industry SOP to be attained are correctly interpreted. 4) Training requirements are identified from the gap between the required skills and the current skills of the target group. 5) Training requirements are confirmed with appropriate personnel. **Element 2 – Develop outlines of training sessions** 1) The training goals, outcomes, performance and underpinning knowledge are identified. 2) The training requirements, workplace application, activities and tasks required to develop the requisite skills are analyzed. 3) A range of training delivery methods are identified which are appropriate for: a. skills to be achieved; b. training goals; c. characteristics of participants; d. LLN (language/literacy/numerical) skill level of the participants; e. availability of equipment and resources; f. industry/enterprise context and requirements. 4) Training session outlines are mapped against required skills and deficiencies are identified and addressed. 5) Special requirements for resources, practice requirements and training experiences are documented. 6) Methods of supporting and guiding training participants including LLC are specified **Element 3 – Develop training materials** 1) Available materials to support the training are checked for relevance and appropriateness in terms of the language style, characteristics of participants and copyright. 2) Existing materials are customized or resources are developed to enhance the learning capability of training participants. 3) Instructions for use of learning materials and any required equipment are provided. 4) Copyright laws are observed. 5) Training resources costs are identified and calculated and approvals are obtained from appropriate personnel. 6) Clear and comprehensive documentation, resources and materials are developed and used. **Element 4 – Develop training sessions** 1) Training session plans are developed to meet the training goals. 2) Training session plans specify planned session outcome. 3) Opportunities are	**UNIT VARIABLES** **Training programs** is a collection of training activities to meet SS requirements of a target group where Client provides the approvals for expenses of training resources. **Target group** may include: in-service employees or groups/individuals with special training and/or recognition needs. **Training** may be: on the job, simulated setting, in the workplace environment or in the classrooms, a combination of locations to suit the SS being trained, in a singe or multi-side operations. **Appropriate personnel** may include: 1) Team leader/supervisor/technical experts. 2) Managers/employees. 3) Participants/employees/students/learners. 4) Technical experts including language/literacy/numerical experts. 5) Representative government regulatory bodies. 6) Union/employee representatives. 7) Consultative committees. 8) Users of the training information. 9) Trainers/Lecturers/Teachers/ Assessors. **Training Program may be based on**: National Industry Training Packages, Enterprise Training Packages, Agreed curriculum, International Standards, GQL, EJL, RCPP **Target group skills may be identified** by: 1) Contents of curriculum vitae. 2) Reports on Assessment of SS. 3) Enterprise training and assessment record keeping system. 4) Self, peer or supervisor reports. **Training sessions** may involve theory, demonstration/practice, or a combination of the two. **Training program delivery** may involve: enterprise/workplace based, training provider based, community based, school based, international/regional programs, fee for service, combination of the above. **Characteristics of training participants** include the following information related to: 1) Language/literacy/numerical needs. 2) Cultural, language, educational background. 3) Gender. 4) Physical ability. 5) Level of confidence, nervous or anxiety. 6) Age. 7) Previous experience with topics. 8) Experience in training and assessment. 9) Enterprise organization or roster **Training delivery methods** may include: face to face; distance learning; trainer centered/participant centered; Lock Step/Partly Self Paced/All Self Paced; Real time/Time Independent; Place Dependent/Place Independent; interactive, mentoring; active learning; coaching. **Training materials** may include: Non-endorsed components of a training packaged; work books; workshop guides; background readings/references; handouts; industry/enterprise SOP; supportive policies and legislation. **Practice opportunities** may include: on the job; off the job but located in participants workplace; off the job in a special demonstration area; off the job in an external training room; work/field placements; job rotation; a combination of the above. **Training activities and tasks** may include: oral presentations; simulations; project works; group activities; practical demonstrations; assignments; laboratory works; shadowing /coaching/ mentoring; computer based training; role plays; interviews; discussion groups; surveys; action learning; on the job learning; off the job learning; temporary practical placements.

created within training session design for participants to manage own skills acquisition and apply the relevant skills in the workplace/practice. 4) Session plans identify delivery methods which are appropriate for: a. skills to be achieved; b. training goals; c. participants characteristics; d. LLC level of participants; e. available learning resources and equipment ; f. industry / enterprise / workplace context and requirements; g. each session outline. 5) Training sessions are designed to measure participant progress towards training goals. 6) Sequence and timing of the training sessions are documented.

Element 5 – Arrange resources

1) Resources required for the training are identified and where access is required, approved by the appropriate personnel. 2) Appropriate training locations are identified and arranged. 3) Arrangement are made with additional personnel required to support the training program. 4) The training environment is arranged to be safe, accessible and suitable for the acquisition of the required skills. 5) Learning resources, documentation on required skills, assessment procedures and information on available support of training participants are organized and held in an accessible format.

ASSESSMENT GUIDE

1) **Evidence of the following products to be collected**: a. description of clients, target groups, and appropriate personnel; b. analysis of training needs of target group; c. outline of training program requirements; d. outline of training program goals and supporting documents for achievement of program goals; e. documentation on training resources; f. sample of training material; g. training session plans.

2) **Evidence of the following processes to be collected**: how client/target groups/appropriate personnel were identified; b. how required competencies were determined to meet the client's needs; c. why there is a need for training opposed to other non-training alternatives; d. how the need for training was verified with appropriate personnel; e. how appropriate personnel approved training program resources; f. how language/literacy/numerical issues were taken into considerations of the planning process.

3) **Required skills and knowledge**: a. Understand SS Based training and assessment; b. relevant SS and industry/enterprise SOP; c. relationships between SS to Enterprise Job Levels (EJL), General Qualification Level, and Remuneration and Career Path Progression (RCPP); d. understanding of principles of adult learning and SS Based Training (SBT); e. identification and correct use of equipment, processes and procedures relevant to the SS unit(s); f. knowledge of training needs analysis and planning; g. sources of special training assistance such as language/literacy/numerical issues); h. planning own work including predicting consequences and identifying improvements; i. appropriate and related communication skills; j. calculate and estimate costs, time and length of training sessions and resources.

APEC SS 2.07.04.05
DELIVER TRAINING SESSIONS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Prepare training participants 1) Training program goals and session outcomes are explained to and discuss with the participants. 2)The training program workplace applications, training activities and task are explained and confirmed with the participants. 3) Needs for participants for skills acquisition are identified. 4) The series of sessions for the training program are explained to participants. 5) Ways in which the skills are to be developed and assessed are explained to and confirm with the participants. 6) Language is adjusted to suit the participants and strategies / techniques are employed to confirm understanding (e.g. paraphrasing, questioning). **Element 2 – Present training sessions** 1) Presentation and training delivery are appropriate to the characteristics of participants and the development of the skills. 2) Presentation of training and design of learning activities emphasize and reinforce the components of skills, task skills, management skills, contingency management skills, job/role environment skills, transfer/allocation of skills and knowledge to new contexts. 3) Presentation and training delivery methods provide variety, encourage participation and reinforce skills. 4) Spoken language and communication strategies/techniques are used to encourage participation and to achieve outcomes of training sessions. 5) Training sessions are reviewed and	**UNIT VARIABLES** **Training programs** is a collection of training activities to meet SS requirements of a target group where Client provides the approvals for expenses of training resources. **Target group** may include: in-service employees or groups/individuals with special training and/or recognition needs. **Training** may be: on the job, simulated setting, in the workplace environment or in the classrooms, a combination of locations to suit the skills being trained, in a singe or multi-side operations. **Appropriate personnel** may include: 1) Team leader/supervisor/technical experts. 2) Managers/employees. 3) Participants/employees/students/learners. 4) Technical experts including language/literacy/numerical experts. 5) Representative government regulatory bodies. 6) Union/employee representatives. 7) Consultative committees. 8) Users of the training information. 9) Trainers/Lecturers/Teachers/ Assessors. **Training Program may be based on**: National Industry Training Packages, Enterprise Training Packages, Agreed curriculum, International Standards, GQL, EJL, RCPP **Target group skills may be identified** by: 1) Contents of curriculum vitae. 2) Reports on Assessment of SS. 3) Enterprise training and assessment record keeping system. 4) Self, peer or supervisor reports. **Training sessions** may involve theory, demonstration/practice, or a combination of the two. **Training program delivery** may involve: enterprise/workplace based, training provider based, community based, school based, international/regional programs, fee for service, combination of the above. **Characteristics of training participants** include the following information related to: 1) Language/literacy/numerical needs. 2) Cultural, language, educational background. 3) Gender. 4) Physical ability. 5) Level of confidence,

modified as necessary to meet participants' needs.

Element 3 – Facilitate individual and group training

1)) The requirements for effective participation in the learning process are explained. 2) Timely information is given to participants during sessions. 3) Training presentations are enhanced with the use of appropriate training resources. 4) Clear and accurate information is presented in a sequence to foster skills development. 5) Language is adjusted to suit participants. 6) Participants are encouraged to ask questions, clarify points of concern, and contribute comments at appropriate and identified stages. 7) Training equipment and materials are used in a way that enhances learning process. 8) Supplementary information is provided to enhance and clarify points of understanding as required by individuals or the group. 9) Key points are summarized at appropriate times to reinforce learning. 10) Individual learning and group dynamics are monitored and managed to achieve program goals. 11) LLN issues are taken into account to facilitate learning process.

Element 4 – Provide opportunities for practice and feedback

1) Process, rationale, and benefits of practice of skills are discussed with participants. 2) Practice opportunities are provided to match: specific skills to be achieved, context of the training, and specific outcomes of the training sessions. 3) Training participants readiness for assessment is monitored and discussed with the participants. 4) Constructive feedback and reinforcement are provided through further training and/or practice opportunities.

Element 5 – Review delivery of training sessions

1) Training participants' review of training delivery is sought. 2) The delivery of the training session is discussed with appropriate personnel at appropriate times. 3) Training delivery is evaluated by the trainer against program goals, session plans, and related SS units. 4) Reactions of the relevant personnel to the delivery are sought and discussed at appropriate times. 5) Adjustments to delivery, presentation and training are considered and incorporated.

nervous or anxiety. 6) Age. 7) Previous experience with topics. 8) Experience in training and assessment. 9) Enterprise organization or roster

Training delivery methods may include: face to face; distance learning; trainer centered/participant centered; Lock Step/Partly Self Paced/All Self Paced; Real time/Time Independent; Place Dependent/Place Independent; interactive, mentoring; active learning; coaching.

Training materials may include: Non-endorsed components of a training packaged; work books; workshop guides; background readings/references; handouts; industry/enterprise SOP; supportive policies and legislation.

Practice opportunities may include: on the job; off the job but located in participants workplace; off the job in a special demonstration area; off the job in an external training room; work/field placements; job rotation; a combination of the above.

Training activities and tasks may include: oral presentations; simulations; project works; group activities; practical demonstrations; assignments; laboratory works; shadowing /coaching/ mentoring; computer based training; role plays; interviews; discussion groups; surveys; action learning; on the job learning; off the job learning; temporary practical placements.

ASSESSMENT GUIDE

1) **Evidence of the following products to be collected**: a. description of clients, target groups, and appropriate personnel; b. analysis of training needs of target group; c. outline of training program requirements; d. outline of training program goals and supporting documents for achievement of program goals; e. documentation on training resources; f. sample of training material; g. training session plans.

2) **Evidence of the following processes to be collected**: how client/target groups/appropriate personnel were identified; b. how required competencies were determined to meet the client's needs; c. why there is a need for training opposed to other non-training alternatives; d. how the need for training was verified with appropriate personnel; e. how appropriate personnel approved training program resources; f. how language/literacy/numerical issues were taken into considerations of the planning process.

3) **Required skills and knowledge**: a. Understand SS Based training and assessment; b. relevant SS and industry/enterprise SOP; c. relationships between SS to Enterprise Job Levels (EJL), General Qualification Level, and Remuneration and Career Path Progression (RCPP); d. understanding of principles of adult learning and SS Based Training (SBT); e. identification and correct use of equipment, processes and procedures relevant to the SS unit(s); f. knowledge of training needs analysis and planning; g. sources of special training assistance such as language/literacy/numerical issues); h. planning own work including predicting consequences and identifying improvements; i. appropriate and related communication skills; j. calculate and estimate costs, time and length of training sessions and resources.

APEC SS 2.07.05.05
REVIEW TRAINING

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Record training data 1) Details of training program and target group's skills attainment are recorded in accordance with the training system requirements and securely stored. 2) Training records are made available to authorized persons and	**UNIT VARIABLES** **Training programs** is a collection of training activities to meet SS requirements of a target group where Client provides the approvals for expenses of training resources. **Clients** may include: a department/division, a work area, or an enterprise/organization. **Client's needs** may include: 1) Increased productivity. 2) Increased enterprise profitability. 3) Attainment of specified industry or enterprise skills. 4) Achievement of community priorities. 5) Achievement of government priorities. 6) Licensing or accreditation requirements, GQL/EJL/RCPP **Appropriate personnel** may include: 1) Team leader/supervisor/technical experts. 2) Managers/employees. 3) Participants/employees/students/learners. 4) Technical experts including language/literacy/numerical experts. 5) Representative government regulatory bodies. 6)

training participants at the required times, as specified in the training system recording and reporting documents.	Union/employee representatives. 7) Consultative committees. 8) Users of the training information. 9) Trainers/Lecturers/Teachers/ Assessors.
Element 2 – Evaluate training	**Training Program may be based on**: National Industry Training Packages, Enterprise Training Packages, Agreed curriculum, International Standards, GQL, EJL, RCPP
1) Training is evaluated against identified needs and goals of the training program. 2) Feedback on the training program is sought from training participants and appropriate personnel. 3) Training participants are encouraged to evaluate how progress towards achieving skills was enhanced by the training sessions. 4) Trainer's performance is reviewed against: program goals; the training and assessment SS; training participant's comments; training participant's skill attainment. 5) Results of the evaluation are used to improve current and future training. 6) Suggestions are made for improving any aspect of recording procedures.	**Training sessions** may involve theory, demonstration/practice, or a combination of the two.
	Training program delivery may involve: enterprise/workplace based, training provider based, community based, school based, international/regional programs, fee for service, combination of the above.
	Characteristics of training participants include the following information related to: 1) Language/literacy/numerical needs. 2) Cultural, language, educational background. 3) Gender. 4) Physical ability. 5) Level of confidence, nervous or anxiety. 6) Age. 7) Previous experience with topics. 8) Experience in training and assessment. 9) Enterprise organization or roster
	Training delivery methods may include: face to face; distance learning; trainer centered/participant centered; Lock Step/Partly Self Paced/All Self Paced; Real time/Time Independent; Place Dependent/Place Independent; interactive, mentoring; active learning; coaching.
	Training materials may include: Resources associated with SS; work books; workshop guides; background readings/references; handouts; industry/enterprise SOP; supportive policies and legislation.
	Training support may come from: technical and subject experts; LLN specialists; team leaders / supervisors/ managers/ employers; specific enterprise; teachers/ trainer/ assessors; training coordinators.
Element 3 – Report on training	**Practice opportunities** may include: on the job; off the job but located in participants workplace; off the job in a special demonstration area; off the job in an external training room; work/field placements; job rotation; a combination of the above.
1) Reports on outcomes of the training sessions are developed and distributed to appropriate personnel.	**Training evaluation** may include Affective (satisfaction with the program); Cognitive (knowledge or skills gain); Performance /Behavior (absenteeism form work, productivity, efficiency)
	Reports on training may be: on a blank format or template; written, verbal; combination of the above.
	ASSESSMENT GUIDE
	1) **Evidence** in: a. knowledge of SS Based training and assessment; b. relevant SS and SOP; c. legal and ethical responsibilities including OHSS, equal employment/anti discrimination/gender; d. enterprise policies and procedures for training; e. evaluation and review methodologies; f. establishment of criteria to evaluate training programs; g. adaptation and use of training record systems for formative and summative assessment; h. LLN; i. application of cultural understanding for training and assessment.
	2) **Required skills and knowledge**: a. ability to produce evaluation reports according to performance criteria; b. ability to maintain training and assessment records; c. ability to produce reports on the outcomes of the training sessions and training program; d. promotional materials; e. cost incurred; f. how and why evaluation methods were selected; g. how evaluation information was gathered and acted upon; h. how the report on training sessions /programs was made to appropriate personnel; how records are maintained, kept confidential and secured.

APEC SS 2.07.06.05
DESIGN TRAINING COURSES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine the need for a course	**UNIT VARIABLES**
1) Stakeholders are identified and consulted to establish training aims and requirements. 2) Course proposal is outlined in terms of stakeholders' aims. 3) Relevant endorsed SS and curriculum are sourced and assessed for relevance to course proposal. 4) Any licensing/regulatory or government policies relevant to the course proposal are identified. 5) Potential employment markets and career opportunities for training participants are recorded and documented. 6) Results of monitoring activities for related courses are sourced and analyzed.	**Stakeholders** may include: industry/professional/trade associations; employer association; Union/employee associations; provider representatives; potential learners; trainers/teachers; government/regulatory bodies; enterprise/organization; industry training advisory bodies; community sector.
	Training Course may be based on: National Industry Training Packages, Enterprise Training Packages, Agreed curriculum, International Standards, GQL, EJL, RCPP, a number of SS modules.
Element 2 – Identify learners profile	**Training sessions** may involve theory, demonstration/practice, or a combination of the two.
) Potential learners are identified. 2) Profiles of learners on entry to the course are developed and learner profiles are examine to determine LLN requirements.	**Training delivery** may involve: enterprise/workplace based, training provider based, community based, school based, international/regional programs, fee for service, combination of the above.
Element 3 – Develop course structure	**Learners profiles** may include: Generic or technical SS of potential clients; relevant prior learning (formal or informal) and employment, LLN

1) Core and elective SS units are identified. 2) The relationship between SS units and course outcomes is documented. 3) Entry and exit points are identified and documented. 4) Prerequisites for the course and for specific SS units within the course are identified ad documented.	skills.
	Training outcome may include: GQL / EJL / RCPP / SoA; SS units; requirements for licensing / membership of professional associations / further education opportunities/ employment.

Element 4 – Determine the training and assessment requirements

1) The professional development and skills requirements of trainers and assessors are identified in consultation with appropriate personnel. 2) The trainer and assessor requirements are checked for consistency with industry assessment guidelines. 3) Essential learning resources, materials, facilities, equipment and human resources are identified.

Element 5 – Define the training contents

1) The skills to be acquired by learners are clearly defined. 2) Entry level skills are identified and documented. 3) Requirements for on the job training or assessment are identified and documented. 4) Appropriate evidence and assessment methods are identified and documented.

Element 6 – Develop course monitoring arrangement

1) Mechanisms for on going monitoring are negotiated, agreed and documented in consultation with appropriate personnel. 2) Arrangements to enable course outcomes to be evaluated against relevant performance indicators including industry/enterprise standards and SOP and learner needs are defined and documented.

Element 7 – Identify RCPP (Remuneration and Career Path Progression) / Educational Pathways.

1) Course entry and exit points are linked to occupational and educational opportunities. 2) Articulation points with higher or related qualifications are identified, negotiated with course owners and documented.

Course monitoring arrangements may include: a. panel of evaluators; b. feedback from learners, during and after course delivery; c. survey responses from industry and enterprises; d. moderation mechanisms of assessment decisions; e. conduct of internal and external reviews; f. sampling and evaluation of skills achieved; g. networking of trainers and assessors involved in the course implementation.

Entry requirements may include: prerequisite SS; access to workplace.

Training requirements may include: job placement; field placement; access to specialist equipment and facilities; minimum SS to be mastered by the trainers.

Assessment requirements may include: minimum SS to be mastered by the assessors; assessment conditions including location, timing and access to resources.

ASSESSMENT GUIDE

1) Ability to demonstrate competence and knowledge in: a. knowledge of mechanism to implement relevant access and equity principles; b. knowledge of relevant SS for course proposal; c. knowledge of accreditation and licensing regulations; d. knowledge of course monitoring mechanisms; e. compliance for copyrights and other regulations; f. LLN skills; g. skills in planning own work including predicting consequences and identifying improvements; h. appropriate communication skills; i. skills in the application of OHSS, GQL, EJL, SoA, RCPP.

2) Look for documentation on the identification and confirmation of stakeholder training aims and requirements; course proposal information; course documentation; description of enterprise RCPP.

3) Look for evidence of: how stakeholder needs were identified; how the learner profile was researched; how assessment and training requirements were researched; how the course monitoring arrangements were developed.

APEC SS 2.07.07.05
PLAN SKILL STANDARDS ASSESSMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish evidence for assessment 1) Evidence required to infer competency from the industry/enterprise SOP is established for the specific context. 2) Relevant units of competency are thoroughly read and accurately interpreted to identify the evidence required. 3) Specific evidence to establish should be: a. valid and reliable inferences of competency; b. Authenticated performance of the person being assessed; c. currency of competency. 4) Sufficient evidence is specified to show consistent achievement of the specified standards. 5) The cost of gathering the required	**UNIT VARIABLES** **Assessment system** may be developed by: the industry, the enterprise, registered training provider, or a combination of the above. **Assessment system** should specify the following: a. the purpose of assessment; b. competencies required for the assessor; c. record keeping procedures and policies; d. any allowable adjustment methods which may be made; e. appeal/review mechanism or procedures; f. the review or evaluation for the assessment process; f. linkages between assessment and training qualifications; g. employee classifications (if applicable); h. remuneration, progression and relevant policies; i. quality assurance mechanism; j. apportionment of assessment fees (if applicable); k. marketing/promotion of assessment; l. verification arrangement; m. patronage arrangement (if applicable); n. partnership arrangement (if applicable). **Specific assessment context** may be determined by: 1) Purpose of assessment such as: a. gaining a particular qualification or license; b. determining employee classification; c. recognizing prior learning or current competencies; d. identifying needs or progress. 2) Location of assessment such as on or off the job or a combination of both. 3) Assessment guidelines as per Assessment Units of Competency. 4) GQL / EJL / SoA / RCPP. 5) Enterprise SOP **Characteristics of person being assessed** may include: language, literacy, numerical needs; cultural, language & educational background; gender; physical ability; level of confidence, nervousness and accuracy; age; experience in training and assessment; previous experience with

evidence is established.

Element 2 – Establish suitable assessment methods

1. Assessment methods appropriate for the gathering the type and amount of required evidence are correctly selected. 2) Opportunities to consolidate evidence gathering activities are identified. 3) Allowable adjustments in the assessment methods are proposed to cater for the characteristic of the person being assessed.

Element 3 – Develop appropriate assessment tools

1) An assessment tool is developed to gather valid, reliable and sufficient evidence for the specific assessment context. 2) The assessment tool is designed to mirror the language used to demonstrate the competency in the specific context. 3) Clear instructions (spoken or written) are prepared including any adjustments which may be made to address the characteristics of the persons being assessed. 4) The assessment tool is checked to ensure flexible, fair, safe and cost-effective assessment.

Element 4 – Trial assessment procedures

1) Assessment methods and tools are trialed with an appropriate sample of people to be assessed. 2) Evaluation of the methods and tools used in the trial should provide evidence of clarity, reliability, validity, fairness, cost effectiveness and ease of administration. 3) Appropriate adjustments are made to improve the assessment method and tool in light of the trial. 4) Assessment procedures, including evidence requirements, assessment methods and assessment tools are ratified with the appropriate personnel in the industry /enterprise and/or training organization where applicable.

the unit being assessed.

Appropriate personnel may include: assessors, persons being assessed, employee/union representative, consultative committees, users of assessment such as training providers / employers / human resources department, government / industry training / recognition authorities, training / assessment coordinators, relevant manager / supervisor / team leaders, and technical specialist.

Appropriate procedures may include: 1) Assessment procedures is developed by persons responsible for the implementation of the assessment process in the industry, the enterprise, training provider or a combination of the above. 2) The assessment procedure should specify the following: a. recording procedure; b. appeal/review mechanism; c. assessment methods to be used; d. instructions/materials to be provided for the assessment; e. criteria for making decisions of competent or not yet competent; f. numbers of assessors; g. evidence required; h. location of assessment; i. timing of assessment; j. assessment group size; k. allowable adjustments to the assessment procedures depending on the characteristics of the person being assessed.

Assessment methods may include: 1) Direct observation of performance, products, practical tasks, projects, simulation exercises. 2) Review of log books and/or portfolios of evidence. 3) Consideration of third party reports and authenticated prior achievements. 4) Written, oral or computer managed questioning.

Assessment tools may include: 1. Specific instructions to be given related to the performance of practical tasks, process or simulation exercises. 2) Specific instructions to be given in relation to the production of projects and exercises. 3) Sets of verbal/written/computer based questions to be asked. 4) Performance checklist. 5) Log books. 6) Description of competent performance. 7) Combinations of the part of the above.

Assessment environment and resources to be considered include: time, location, personnel, finance/costs, equipment, materials, OHSS, industry / enterprise SOP.

Allowable adjustments may include: 1) Provision of personal support service (such as reader, interpreter, attendant, etc). 2) Use of adaptive technology or special equipment such as word processor or lifting gear. 3) Design of shorter assessment sessions to allow for fatique and medication. 4) Use of large print version of any papers.

The assessor should use competencies relevant to his/her area of technical expertise.

ASSESSMENT GUIDE*

1) Ability to demonstrate competence and knowledge in: a. knowledge of SOP of the unit and assessment guidelines; b. knowledge of legal and ethical responsibilities including OHSS regulations and procedures, equal employment and anti-discrimination requirements relevant to the specific context; c. understanding of assessment principles of reliability, validity, fairness, flexibility, authenticity, sufficiency and consistency; d. knowledge and understanding of other Skill Standards related to workplace assessment and training; e. skills in the application of various assessment methods relevant to workplace context. f. planning own work including predicting consequences and identifying improvements; g. language, literacy and numerical skills required for planning assessment; h. preparation of required documentation; i. calculate and estimate costs; j. communications skills appropriate to the culture of the workplace and the individuals.

2) Look for documentation in relation to: a. specific assessment context, including the purpose of assessment; b. features of the assessment system; c. characteristics of the person being assessed; d. evidence of competency required; e. plan of opportunities for gathering the evidence required; f. assessment methods selected including any allowable adjustments. g. assessment tools selected for the specific assessment context which ensures valid, reliable, flexible and fair assessment; h. an assessment procedure for the specific context.

3) Ability to give evidence of the following process: a. how the context of assessment was specified; b. how the characteristics of the person being assessed is identified; c. why a particular assessment method was selected; d. how the assessment was planned to ensure the inclusion of language, literacy and numerical issues; e. how evidence was evaluated in terms of validity, authenticity, sufficiency, currency and consistent achievement of specific standards; f. how the assessment tools were developed for the specific context; g. how the assessment tools were validated and ratified by appropriate personnel.

APEC SS 2.07.08.05
CONDUCT SS ASSESSMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify and explain the context of assessment 1) The context and purpose of assessment are discussed and confirmed with the persons being assessed. 2) The relevant performance standards to be used in the assessment are clearly explained to the person being assessed. 3) The assessment procedures are clarified and expectations of assessor and candidate are agreed. 4) Any legal and ethical responsibilities associated with the assessment are explained to the persons being assessed. 5) The needs of the person being assessed are determined to establish any allowable adjustments in the assessment procedures. 6) Information is conveyed using language and interactive strategies and techniques to communicate effectively with the persons being assessed. **Element 2 – Plan evidence gathering opportunities** 1. Opportunities to gather evidence of competency, which occur as part of workplace or training activities, are identified covering the dimensions of competency. 2) The need to gather additional evidence which may not occur as part of the workplace or training activities is identified. 3) Evidence gathering activities are planned to provide sufficient, reliable, valid and fair evidence of competency in accordance with the assessment procedures. **Element 3 – Organize assessment** 1. The resources specified in the assessment procedure are obtained and arranged within a safe and accessible assessment environment. 2) Appropriate personnel are informed of the assessment. 3) Spoken interaction and any written documents employ language and strategies and techniques to ensure the assessment arrangements are understood by all persons being assessed and other appropriate personnel. **Element 4 – Gather evidence** 1. Verbal and non-verbal language is adjusted and strategies are employed to promote a supportive assessment environment to gather evidence. 2) The evidence specified in the assessment procedure is gathered, using assessment methods and tools. 3) Evidence is gathered in accordance with allowable adjustments where applicable. 4) The evidence gathered is documented in accordance with the assessment procedures. **Element 5 – Make the assessment decision** 1) The evidence is evaluated in terms of validity, authenticity, sufficiency, currency and consistent achievement of the specified standard. 2) The evidence is evaluated	**UNIT VARIABLES** **Assessment system** may be developed by the industry, the enterprise/organization, a registered training provider and a combination of the above. **Assessment system** should specify the following: a. the purpose of assessment; b. competencies required for assessors; c. record keeping procedures and policies; d. any allowable adjustments to the assessment method which may be made; e. the appeal / review mechanism and procedures; f. the review and evaluation of the assessment process; g. the linkages between the assessment and training qualifications, employee classification, remuneration and progression (if applicable); h. relevant policies; j. quality assurance mechanism; k. apportionment of costs / fee (if applicable); l. marketing / promotion of assessment; m. verification arrangements; n. patronage arrangements (if applicable); o. partnership arrangements (if applicable); p. purpose of assessment such as gaining a particular qualification or license, determining employee classification, recognizing prior learning / current competencies, identifying training needs or progress; q. location of assessment such as on or off the job or a combination of both; r. assessment guidelines as per assessment file by units, r. features of assessment system. **Characteristics of person being assessed** may include: a. language, literacy and numerical needs; b. cultural, language and educational background; c. gender; d. physical ability; e. level of confidence, nervousness or anxiety; f. age; g. experience in training and assessment; h. previous experience with the topic. **Appropriate personnel** may include: a. assessors; b. persons being assessed; c. employee / union representative; d. consultative committees; e. users of assessment information such as training providers, employers, human resource department; f. government / industry training / recognition authorities; g. training and assessment coordinators; h. relevant managers / supervisors / team leaders; i. technical specialist. **Assessment procedure** may include: 1) The assessment procedure is developed (and endorsed) by persons responsible for the implementation of the assessment process in: the industry, enterprise, training organization, a combination of the above. 2) The assessment procedure should specify the following: a. recording procedure; b. appeal/review mechanism; c. assessment methods to be used; d. instructions / material to be provided to the person being assessed; c. criteria for making decisions of competent or not yet competent; d. numbers of assessors; e. evidence required; f. location of assessment; g. timing of assessment; h. assessment group size; i. allowable adjustments to the assessment procedures depending on the characteristics of the person being assessed. **Assessment methods** may include: a. work samples and/or simulations; b. direct observation of performance, products and simulation exercises; c. review of log books and portfolios; d. questioning; e. consideration of third party reports and authenticated prior achievements; f. written. Oral or computer managed questioning. Theses methods may be used in combination in order to provide sufficient evidence to make judgments. **Assessment tools** may include: a. specific instructions to be given related to the performance of practical tasks, process or simulation exercises. b. specific instructions to be given in relation to the production of projects and exercises. c. sets of verbal/written/computer based questions to be asked. d. performance checklist. e. log books. f. description of competent performance. g. combinations of the part of the above. **Allowable adjustments** may include: 1) Provision of personal support service (such as reader, interpreter, attendant, etc). 2) Use of adaptive technology or special equipment such as word processor or lifting gear. 3) Design of shorter assessment sessions to allow for fatigue and medication. 4) Use of large print version of any papers. **Assessment environment and resources to be considered** include: time, location, personnel, finance/costs, equipment, materials, OHSS, industry / enterprise SOP, GQL/EJL/SoA/RCPP **Recording procedures** may include: forms designed for specific assessment result (paper or electronic), checklist for recording observations/process used (paper or

according to the dimensions of competency, i.e. task skills / task management skills / contingency management skills, job/role environment skills, transfer and application of knowledge and skills to new contexts. 3) When in doubt guidance is sought from experienced assessors. 4) The assessment decision is made in accordance with the criteria specified in the assessment procedures.

Element 6 – Record assessment results

1) Assessment results are recorded accurately in accordance with the specified record keeping requirements. 2) Confidentiality of assessment outcomes is maintained and access to the assessment records is provided only to authorized personnel.

Element 7 – Provide feedback to the person being assessed

1) Clear and constructive feedback in relation to performance is given to the person being assessed using appropriate language and strategies, and may include guidance on further goals / training opportunities. 2) Opportunities for overcoming any gaps in competency, as revealed by the assessment are explored with the persons being assessed. 3) The person being assessed is advised of available re-assessment opportunities and/or review appeal mechanism where assessment decision is challenged.

Element 8 – Report on the conduct of assessment

1. Positive and negative features experienced in conducting the assessment are reported to those responsible for the assessment procedures. 2) Any assessment decision disputed by the persons being assessed is recorded and reported promptly to those responsible for the assessment procedures. 3) Suggestions for improving any aspect for the assessment process are made to appropriate personnel.

electronic), a combination of the above.

Assessment reporting includes: a. name, code and endorsement date of the unit; b. units of competency where additional learning is required.

ASSESSMENT GUIDE

1) Ability to demonstrate competence and knowledge in: a. knowledge of SOP of the unit and assessment guidelines; b. knowledge of legal and ethical responsibilities including OHSS regulations and procedures, equal employment and anti-discrimination requirements relevant to the specific context; c. understanding of assessment principles of reliability, validity, fairness, flexibility, authenticity, sufficiency and consistency; d. understanding of policies and procedures of the workplace and/or job role together with any related government regulations; e. understanding of other skill standards related to training and assessment. f. skills in the application of various assessment methods relevant to workplace context. g. planning own work including predicting consequences and identifying improvements; h. language, literacy, numerical skills and communication skills required for conducting the assessment and give clear and understandable description to the candidate; i. preparation of required documentation; j. communications skills appropriate to the culture of the workplace and the individuals. 2) Look for description of the assessment context, including purpose of assessment. 3) The relevant skill or other performance standards and assessment procedures. 4) Description of how evidence gathered is valid, authentic, sufficient, fair and reliable to ensure skills. 5) Look for ability to record the assessment results according to specified procedures. 6) Ability to report on the conduct of the assessment, including positive and negative features of the process.

The following evidence should also be gathered:

1) How agreement was sought with the persons being assessed on the conduct of the assessment. 2) How opportunities to gather evidence were identified as part of the training activities. 3) How evidence was gathered in accordance with the assessment procedures. 4) How evidence gathering activity covered the dimensions of skills. 5) How resources were arranged according to assessment procedures. 6) How appropriate personnel were consulted. 7) How evidence was gathered in accordance with allowable adjustments to the assessment method where applicable. 8) How evidence was evaluated in terms of validity, authenticity, sufficiency, currency and consistent achievement of the specified standard. 9) How assessment was conducted to ensure that: all arrangement & activities were understood by all parties, the person was put at ease & a supportive assessment environment was created, language/literacy/numerical issues were taken into consideration. 10) How constructive feedback was provided to the persons being assessed including instances of NOT YET COMPETENT/SKILLED. 11) How guidance was provided to persons being assessed on how to overcome gaps in skills

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APEC SS 2.07.09.05
REVIEW SS ASSESSMENT

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Review the assessment procedures 1) Appropriate personnel are given the opportunity to review the assessment outcomes and procedures using agreed evaluation criteria. 2) The review process is established by the organization, industry or registered provider. 3) The assessment procedures are reviewed at a specified site in cooperation with persons being assessed, and any	**UNIT VARIABLES** **Assessment system** may be developed by the industry, the enterprise/organization, a registered training provider and a combination of the above. **Assessment system** should specify the following: a. the purpose of assessment; b. competencies required for assessors; c. record keeping procedures and policies; d. any allowable adjustments to the assessment method which may be made; e. the appeal / review mechanism and procedures; f. the review and evaluation of the assessment process; g. the linkages between the assessment and training qualifications, employee classification, remuneration and progression (if applicable); h. relevant policies; j. quality assurance mechanism; k. apportionment of costs / fee (if applicable); l. marketing / promotion of assessment; m. verification arrangements; n. patronage arrangements (if applicable); o. partnership arrangements (if applicable). **Specific assessment context** may be determined by; a. purpose of assessment such as gaining a particular qualification or license, determining employee classification, recognizing prior learning / current competencies, identifying training needs or progress; b. location of assessment such as on or

appropriate personnel in the industry / organization / training provider and / or any agency identified under government regulations. 4) Review activities are documented, findings are substantiated and the review approach evaluated.

Element 2 – Check consistency of assessment decisions

1) Evidence from a range of assessments is checked for consistency across the dimensions of competency. 2) Evidence is checked against the key abilities. 3) Consistency of assessment decisions with defined performance standards are reviewed and discrepancies and inconsistencies are noted and acted upon.

Element 3 – Report review findings

1. Recommendations are made to appropriate personnel for modifications to the assessment procedure/s in light of the review outcomes. 2) Records are evaluated to determine whether the needs of appropriate personnel have been met. 3) Effective contributions are made to system-wide reviews of the assessment process and feedback procedures.

off the job or a combination of both; c. assessment guidelines as per assessment file by units, d. features of assessment system.

Evaluation criteria in review process should include: a. number of persons being assessed; b. duration of assessment procedures; c. Organizational health and safety factors; d. OHSS factors; e. relationship of the assessor and other appropriate personnel in the assessment process; f. frequency of assessment procedures; g. budgetary restraints; h. government or regulatory information; i. support needs and professional development needs of assessors; j. characteristics of the person being assessed; k. human resource management implications; l. consistency of assessment decisions; m. levels of flexibility in the assessment procedures; n. fairness of the assessment process; o. efficiency and effectiveness of the assessment procedures; p. competencies achieved by the persons being assessed; q. difficulties encountered during the planning and conduct of assessment; r. motivation of the person being assessed; s. location and resources suitability; t. reliability, validity, fairness, and flexibility of the assessment tools; u. relevance to the specified context; v. grievance/challenges to the assessment decision by the persons being assessed or their supervisor/manager/employer; w. ease of administration; x. access and equity considerations; y. practicability.

Characteristics of person being assessed may include: a. language, literacy and numerical needs; b. cultural, language and educational background; c. gender; d. age; e. physical ability; f. level of confidence, nervousness or anxiety; g. experience in training and assessment; h. previous experience with the topic; i. work organization or roster.

Appropriate personnel may include: a. assessors; b. persons being assessed; c. employee / union representative; d. consultative committees; e. users of assessment information such as training providers, employers, human resource department; f. government / industry training / recognition authorities; g. training and assessment coordinators; h. relevant managers / supervisors / team leaders; i. technical specialist.

Assessment procedure may include: 1) The assessment procedure is developed (and endorsed) by persons responsible for the implementation of the assessment process in: the industry, enterprise, training organization, a combination of the above. 2) The assessment procedure should specify the following: a. recording procedure; b. appeal/review mechanism; c. assessment methods to be used; d. instructions / material to be provided to the person being assessed; c. criteria for making decisions of competent or not yet competent; d. numbers of assessors; e. evidence required; f. location of assessment; g. timing of assessment; h. assessment group size; i. allowable adjustments to the assessment procedures depending on the characteristics of the person being assessed.

Assessment methods may include: a. work samples and/or simulations; b. direct observation of performance, products and simulation exercises; c. review of log books and portfolios; d. questioning; e. consideration of third party reports and authenticated prior achievements; f. written. Oral or computer managed questioning. Theses methods may be used in combination in order to provide sufficient evidence to make fair judgment.

Assessment tools may include: a. specific instructions to be given related to the performance of practical tasks, process or simulation exercises. b. specific instructions to be given in relation to the production of projects and exercises. c. sets of verbal/written/computer based questions to be asked. d. performance checklist. e. log books. f. description of competent performance. g. combinations of the part of the above.

Allowable adjustments may include: 1) Provision of personal support service (such as reader, interpreter, attendant, etc). 2) Use of adaptive technology or special equipment such as word processor or lifting gear. 3) Design of shorter assessment sessions to allow for fatigue and medication. 4) Use of large print version of any papers.

Assessment environment and resources to be considered include: time, location, personnel, finance/costs, equipment, materials, OHSS, industry / enterprise SOP, GQL/EJL/SoA/RCPP.

ASSESSMENT GUIDE

1) Ability to demonstrate competence and knowledge in: a. knowledge of the review process established; b. knowledge of evaluation methodologies relevant to assessment context; c. relevant organization SOP and assessment guidelines; d. knowledge of legal and ethical responsibilities in OHSS, equal employment and anti discrimination; e. knowledge of the relevant organization policies and procedures of the workplace; f. reliability, validity, fairness, flexibility, authenticity, sufficiency, and consistency in judging the evidence; g. skills in applying the various assessment methods; h. understanding of predicted consequences and identifying improvements; i. language, literacy, numerical and communications skills; j. cultural aspects of the workplace and the individuals.

2) Look for: a. documented process for the review of assessment procedures; b. a report on review of the operations and outcomes of the assessment procedures

3) Look for: a. how the review process for evaluating the assessment in the organization was implemented; b. why particular review evaluation methodologies were chose; c. how cooperation and input from the persons assessed and appropriate personnel were sought as part of the review.

APEC SS 2.07.10.05
DEVELOP SS BASED ASSESSMENT PROCEDURES

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Establish evidence requirements 1. The purpose of the assessment and the target group to be assessed is identified and confirmed with stakeholders. 2) The type of evidence required to infer skills is established and the process of interpreting and recording the evidence is established and documented. 3) Evidence requirements are specified to ensure coverage of the key components of the skills. 4) Evidence requirements are specified to ensure validity, currency, authenticity and sufficiency. 5) Where additional levels of competence are used, criteria for making judgments for different levels of skills are defined. 6) Links to existing relevant assessment systems are defined including: a. recording and reporting requirements; b. appropriate personnel and requirements for receiving information about the assessment; c. appeal process; d. quality assurance mechanism. 7) Any additional review mechanisms are identified and documented. 8) The reporting formats for the assessment process and recording of outcomes are designed. 9) The development, implementation and review costs of the assessment procedures are estimated. **Element 2 – Identify assessment methods** 1) The context and location of assessments are described and specified. 2) The facilities and physical resources needed to conduct the assessments are identified and documented. 3) A range of assessment methods for gathering evidence related to the unit to be assessed are evaluated for validity, reliability, fairness, cost effectiveness, administration ease, characteristics of the target group. 4) The number of assessors and any required support to implement the assessment process is determined. 5) Instructions for the assessment are drafted. 6) The assessment methods to be used are selected and allowable adjustments are proposed to cater for the characteristics of the persons being assessed. 7) The required evidence of skills to be demonstrated or supplied by the persons being assessed are identified. 8) The instruction for interpreting the evidence and making a decision of competence are documented. 9) Descriptions of likely performance are established and verified with appropriate personnel. 10) Other related skills are identified for inferring full or partial competence from the evidence gathered. 11) The rules for verifying assessment decisions are determined. 12) Any limits, variations or restrictions on the assessment tools are specified. **Element 3 – Identify potential available assessment tools** 1) Available assessment tools appropriate to evidence required skills are identified and evaluated in relation to: characteristics of the person being assessed, assessment contexts, and assessors. 2) A panel of specialists is convened to critique tools for: reliability,	**UNIT VARIABLES** **Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities. **Target groups** may include: an enterprise/organization, a department/division, a job role/occupation, an industry sector, professional association, a trade, community sector, and government organization. **Purpose of assessment** may be: diagnosing performance, classifying employees, confirming employees' skills for placement or career advancement, awarding a qualification, confirming progress in skills learning/acquisition, recognizing prior learning or current skills, achieving GQL, Attaining EJL/SoA/RCPP. **Evidence for assessment** may include indirect, indirect or combination of the above. Evidence may be interpreted using a range of reference frames such as criterion referenced frames, linkages of evidence to skill standards, and prediction of workplace performance. **Characteristics of person being assessed** may include: a. language, literacy and numerical needs; b. cultural, language and educational background; c. gender; d. age; e. physical ability; f. level of confidence, nervousness or anxiety; g. experience in assessment; h. previous experience with the topic; i. work organization or roster. **Appropriateness of evidence type** may include: cost effectiveness, practicability, flexibility, communication skills of persons being assessed, assessment experience/characteristics of persons being assessed. **Assessment methods** may include combinations of direct observation, practical tasks, projects, written/oral/computer based questioning, simulation, third party report and authenticated prior achievements. **Allowable adjustments** may include: 1) Provision of support service (such as reader, interpreter, attendant, etc). 2) Use of adaptive technology or special equipment such as word processor or lifting gear. 3) Design of shorter assessment sessions to allow for fatique and medication. 4) Use of large print version of any papers. **Specialist panel** may include: technical specialist, language/literacy/numerical specialists, assessment specialists, management/organization representatives, industry representatives, Union or employee representatives, potential past candidates. **Operational constraints** may include: time available for assessment, relative costs involved, availability of assessors, availability of technical experts, availability of persons being assessed, and geographical locations of persons being assessed. **Recording system** may include: paper based system, computer based system or a combination of both. **Assessment system** may involve the industry, the enterprise/organization, a registered training provider and a combination of the above. **Assessment system** should specify the following: a. the purpose of assessment; b. competencies required for assessors; c. record keeping procedures and policies; d. any allowable adjustments to the assessment method which may be made; e. the appeal / review mechanism and procedures; f. the review and evaluation of the assessment process; g. the linkages between the assessment and training qualifications, employee classification, remuneration and progression (if applicable); h. relevant policies; j. quality assurance mechanism; k. apportionment of costs / fee (if applicable); l. marketing / promotion of assessment; m. verification arrangements; n.

validity, fairness, relevance to the workplace context, content accuracy, ease of use, cost effectiveness, appropriateness of language and avoidance of bias. 3) Adjustments to the tools and methods are made to ensure applicability to the context, skills assessed, and characteristics of persons being assessed.

Element 4 – Trial the assessment methods and tools

1). The tools and assessment method are trialed with a sample from the target group. 2) Allowable adjustments to the assessment methods and tools are drafted. 3) Assessors (if required) are trained to administer the assessment tools in a consistent manner. 4) The assessment tools and method are administered to target sample. 5) Responses from target sample and the assessors are compiled and analyzed. 6) The appropriateness of the assessment method and the ease of use and language level of the assessment tools are determined. 7) Improvements and changes to the assessment tools are made where necessary.

Element 5 – Document assessment procedures

1) Any influences that may affect (bias) the assessment decisions are identified and documented. 2) Any allowable adjustments to the assessment methods and tools to meet the characteristics of the persons being assessed are documented. 3) The criteria for making decisions of COMPETENT or NOT YET COMPETENT are reviewed and if necessary, adjusted. 4) The assessment procedures and administration instructions are documented.

patronage arrangements (if applicable); o. partnership arrangements (if applicable).

The assessment procedure should include: a. recording procedure; b. appeal/review mechanism; c. assessment methods to be used; d. number of assessors; e. assessment tools; f. location of assessment; g. timing of assessment; h. assessment group size; i. allowable adjustments to the assessment methods and tools.

ASSESSMENT GUIDE

1) Ability to demonstrate: a. knowledge of relevant industry/enterprise skill standards, or other performance standards if applicable; b. knowledge of assessment methods, their purpose and when to use; c. skills in applying assessment methods and tools to elicit evidence from the target group; d. knowledge in the development and modification of assessment tools for the relevant skill standards and the assessment contexts of persons being assessed; e. language of copyright compliance and other government regulations; f. identification of correct use of equipment, processes and procedures; g. planning own work including predicting consequences and identifying improvements.

2) Look for: a. description of the stakeholders, target group, the purpose of assessment; b. a description of the skills to be assessed and evidence required; c. documentation on steps taken to develop the assessment procedures including trialing the assessment methods and tools to assess performance criteria. d. documented assessment procedures; e. how the target group and stakeholders were determined and consulted; f. why particular assessment methods and tools were selected; g. how assessment methods and tools were trialed; h. how other persons were involved.

APEC SS 2.07.11.05
DEVELOP SS BASED ASSESSMENT TOOLS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify the context for the assessment tools 1) The purpose of the assessment, the target group and the SS or other standard of performance to be assessed is identified. 2) Evidence required to assess skill is identified. 3) Assessment methods are evaluated to establish requirements of assessment tools, in particular: a. resources and requirements for the assessment tools; b. assessment location and context; c. administration ease; d. the characteristics of the target group. 4) Requirements of the assessment system in relation to the assessment tools are identified including: a. storage and security of documentation; b. appropriate personnel and differing needs for receiving information about the assessment tools; c. evaluation and review process; d. quality assurance mechanism. 5) Costs of the assessment tools development, implementation and review are estimated. 6) A plan for the development of the assessment tools is prepared. **Element 2 – Draft assessment tools in accordance with plan** 1) Assessment tools are designed to assess the relevant SS using appropriate format, language & numerical requirements, visual & aural representation, question & activity types, media, sequence of activities, and choice in activities. 2) Assessment tools are developed to	**UNIT VARIABLES** Target group may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities. **Target groups** may include: an enterprise/organization, a department/division, a job role/occupation, an industry sector, professional association, a trade, community sector, and government organization. **Purpose of assessment** may be: diagnosing performance, classifying employees, confirming employees' skills for placement or career advancement, awarding a qualification, providing a statement of attainment (SoA), confirming progress in skills learning/acquisition, recognizing prior learning or current skills, attaining EJL/RCPP/GQL. **Evidence for assessment** may include indirect, indirect or combination of the above. Evidence may be interpreted using a range of reference frames such as criterion referenced frames, linkages of evidence to skill standards, and prediction of workplace performance. **Appropriateness of evidence types** includes: 1) Cost effectiveness. 2) Practicability. 3) Communication skills of the persons being assessed. 4) Assessment experience and special needs of persons being assessed. **Components of supervisory and managerial SS include**: 1) Task skills. 2) Task management skills. 3) Contingency management skills. 4) Job/role environment skills. 5) Transfer and application of skills and knowledge to

demonstrate the components of SS of the person being assessed. 3) The assessment tools are checked for the following characteristics: reliability, validity, fairness, relevance to the workplace context, content accuracy, ease of use, accost effectiveness, avoidance of bias, and testing the required scope of the SS. 4) Adjustment to the tools and procedures are made as required.

Element 3 – Develop instructions for assessment tools

1) The instructions for the persons to be assessed are drafted. 2) The instructions for administering each assessment tool are drafted to include: a. the resources needed to conduct the assessment; b. the context for the use of tools. 3) Evidence of skills to be demonstrated is documented and incorporated in the assessment tools. 4) Allowable adjustments identified in the assessment procedures are noted and included in the instructions. 5) The rules of verifying assessment decisions are identified and any limits, variations or restrictions on the assessment tools are specified.

Element 4 – Pilot the assessment tools

1) The tools are piloted with a small sample selected across the range of the target group. 2) Feedback from sample target group individuals and others involved in administering the pilot is used to establish appropriate amendments to the assessment tools in relation to: a. ease of use; b. language, literacy and numerical requirements of the SS; c. appropriateness for the assessment context and SS; d. cost/time effectiveness for candidate and assessors. 3) Improvements and changes to the assessment tools are made where necessary.

Element 5 – Validate assessment tools

1) An adequate sample of the target group to be assessed is selected. 2) Assessors are trained (if required) to administer the assessment tools in a consistent manner. 3) The assessment tools are administered to the target sample, and responses compiled and analyzed and modified according to findings. 4) Any influences that may affect or bias the assessment decision are identified and documented.

Element 6 – Finalize assessment tools

1. Validated and appropriately amended tools are incorporated in assessment process. 2) Documentation in paper and/or electronic form is filed in appropriate, secure and accessible locations.

new context.

Components of basic-skills SS include: 1) Task skills. 2) Transfer and application of skills and knowledge to new context.

Assessment system may involve the industry, the enterprise/organization, a registered training provider and a combination of the above.

Assessment system should specify the following: a. the purpose of assessment; b. competencies required for assessors; c. record keeping procedures and policies; d. any allowable adjustments to the assessment method which may be made; e. the appeal / review mechanism and procedures; f. the review and evaluation of the assessment process; g. the linkages between the assessment and training qualifications, employee classification, remuneration and progression (if applicable); h. relevant policies; j. quality assurance mechanism; k. apportionment of costs / fee (if applicable); l. marketing / promotion of assessment; m. verification arrangements; n. patronage arrangements (if applicable); o. partnership arrangements (if applicable).

Assessment methods may include combinations of direct observation, practical tasks, projects, written/oral/computer based questioning, simulation, third party report and authenticated prior achievements.

Allowable adjustments may include: 1) Provision of support service (such as reader, interpreter, attendant, etc). 2) Use of adaptive technology or special equipment such as word processor or lifting gear. 3) Design of shorter assessment sessions to allow for fatique and medication. 4) Use of large print version of any papers.

Operational constraints may include: time available for assessment, relative costs involved, availability of assessors, availability of technical experts, availability of persons being assessed, and geographical locations of persons being assessed.

ASSESSMENT GUIDE

1) Ability to demonstrate: a. knowledge of relevant industry/enterprise skill standards, or other performance standards if applicable; b. knowledge of different methodologies for developing assessment tools; c. skills in applying evaluation methodology in trialing assessment tools; d. language and literacy skills to collect and interpret relevant information and communicating with stakeholders and appropriate personnel; e. language of copyright compliance and other government regulations; f. skills in applying relevant workplace policies and procedures and any related government regulations; g. planning own work including predicting consequences and identifying improvements; h. communication skills appropriate to the culture of the workplace.

2) Look for: a. a plan for the development of the assessment tools; b. assessment tools and related instructions for assessors and the person being assessed; c. a report on the piloting of the assessment tools including any changes proposed and made; d. how the target group and stakeholders were determined and consulted; e. why particular assessment methods and tools were selected; f. how assessment methods and tools were trialed; g. how other persons were involved.

APEC SS 2.07.12.05
DESIGN AND ESTABLISH SS BASED TRAINING SYSTEM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine boundaries of the training system 1) Services are determined and established through consultation with the client and stakeholders and a training policy is documented. 2) Stakeholder relationships are maintained through a range of	**UNIT VARIABLES** **Client's needs** may include: 1) Increased productivity. 2) Increased enterprise profitability. 3) Attainment of specified industry or enterprise competencies. 4) Achievement of community priorities. 5) Achievement of government priorities. 6. Licensing or accreditation requirements. **Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy

communication mechanisms and establishment of a service support structure. 3) The financial, physical and human resources available to support the system are identified within agreed quality assurance procedures.

Element 2 – Determine training system features

1) The key features and constraints of the training system are determined in consultation with stakeholders. 2) The key operational features of the system are verified with appropriate personnel and clients and the agreed features of the system are documented.

Element 3 – Match needs with resources

1) The expertise and roles of internal individuals and organizations/partners are identified. 2) A budget detailing development, implementation and maintenance costs of the proposed system is developed, including partner organizations (if applicable).

Element 4 – Design and develop training records and system

1) The record keeping system is designed to allow easy tracking of training participants' progress as well as other agreed features. 2) The record keeping system allows for the storage of detailed information and is designed to be secure, confidential, and easy to administer and update. 3) The record keeping system is developed to allow for appropriate quality assurance requirements and is verified for compliance with accepted enterprise/industry procedures for record keeping and legislative requirements. 4) The record keeping system is designed and verified to allow for fair and consistent responses to grievances. 5) The record keeping system is designed to ensure that relevant legislative and regulatory requirements are met.

Element 5 – Establish procedures for the review of training

1) Review procedures are developed and documented in consultation with stakeholders.

Element 6 – Select and provide for training of system users

1) The required mix of personnel and skills is identified to implement the training system. 2) Appropriate training strategies are identified, modified or developed for trainers and other personnel involved in the training system to acquire SS. 3) The training program selected or developed for SS assessors and trainers are verified to meet the assessment and workplace training SS and other relevant SS.

and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities.

Partners may include: public/private/community training providers, schools, universities, enterprises, industry organizations, government agencies, community organizations, individuals including technical experts, training/assessment specialists.

Key operational features may include: a. the purpose of assessment; b. skills and certifications required of trainers; c. record keeping procedures and policies; d. training context requirements and procedures to match identified skills; e. characteristics of training; f. any allowable adjustments to training methods for participants; g. access and equity considerations, relevant government legislative and regulatory requirements; h. arrangement for recognition of SS; i. allocation of costs / fee (if applicable); j. partnership arrangements; k. location of training; k. the review and evaluation process including quality assurance procedures; l. marketing/promotion of system.

Operational constraints may include: time available for assessment, relative costs involved, availability of assessors, availability of technical experts, availability of persons being assessed, and geographical locations of persons being assessed.

Purpose of training may include: a. language, literacy and numerical needs; b. cultural, language and educational background; c. gender; d. age; e. physical ability; f. level of confidence, nervousness or anxiety; g. experience with topic; h. previous experience with the topic; i. work/family commitments; j. learning styles; k. reasons for undertaking training.

Recording system may include: paper based system, computer based system or a combination of both.

Quality assurance procedures may include: a. conduct of regular internal and external reviews (persons being trained, peer, self, supervisor); b. professional development of participants; c. sampling and evaluation of implementations of SS; d. assessment of the assessors/trainers skills; e. modification of the skills system based on evaluation and reviews; f. promotion of regular networking amongst developers, assessors/trainers and peer review amongst persons responsible for planning, conducting and reviewing assessments/training within the system.

Sources of information may include: training packages, curriculum or other training program confirmation, licensing requirements, government regulations, job descriptions, observation of competent workers, enterprise skills audit report, industry skill audit report, workplace conditions/ policies/ SOP, benchmarking report, industry publications, labor market analysis report, industry/enterprise/regional/international SS, quality assurance procedures.

Policy may include: purpose of training, industrial relations issues, what/who to train, timing of training, links with other HR functions, appeal/review mechanism, criteria for making decisions of COMPETENT or NOT YET COMPETENT, number of trainer, allowable adjustments suitable for the training and trainees, record keeping requirements, recognition of prior learning, development of cost and resources, evaluation, licensing arrangements, qualifications.

ASSESSMENT GUIDE

1) Ability to demonstrate evidence of the **following products**: a. training policy; b. description of clients and stakeholders; c. documentation on the features of the training system; d. report on sources of information for determining the training system; e. report on the design, development, maintenance and security of the record keeping system; f. **summary of available financial, physical and appropriate certified / qualified human resources**; g. analysis of possible constraints for training implementation; h. document of review procedures for the training system ; i. description of selection criteria and training programs for trainers and other personnel involved in the training system; j. documentation of quality assurance mechanism.

2) Ability to demonstrate evidence of **(process)** how stakeholders were consulted and agreement was reached on operational features and quality assurance procedures;

3) How fairness, equity and accessibility of the system were incorporated; why and how the selection criteria for Trainer was chosen; feasibility, cost effectiveness and practicability of the training system; how and why information needed in the development of the training system was sourced; and how the features of training system, implementation plan and quality assurance procedures were verified.

4) Required knowledge and skills to demonstrate: a. language and literacy skills to

Element 7 – Establish quality assurance procedures	comprehend sources of information and to prepare required documentation in a clear and comprehensive format; b. knowledge of relevant industry/enterprise SS and performance criteria; c. knowledge of SS Assessment, SS Training and SS Based Assessment guidelines; d. knowledge of record keeping systems, particularly in relation to assessment; e. knowledge of quality assurance methodology; f. knowledge of compliance with the requirements for copyrights and other regulations; g. knowledge of client's work systems and equipment; h. identification of correct use of equipment, process and procedures; i. knowledge of review/evaluation/methodology, particularly as it relates to training; j. predicting consequences; k. planning improvements; l. communications skills.
1) A quality assurance team or committee is established in consultation with appropriate personnel. 2) Quality assurance procedures, including verification processes are developed in consultation with appropriate personnel. 3) The verification process involves a representative sample of training activities and makes effective use of resources. 4) The quality assurance procedures are trialed for fairness, efficiency and effectiveness. 5) The quality assurance procedures are documented and distributed to trainers and other appropriate personnel. 6) Procedures are established to determine the level of compliance with the training system.	5) Evidence of direct access to relevant clients, stakeholders and sources of information required to address skills and knowledge and to design and establish an SS Based training system. 6) Evidence of consistency in performance over a period of time, in a range of context and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence.

APEC SS 2.07.13.05

DESIGN AND ESTABLISHED SS BASED ASSESSMENT SYSTEM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Determine clients needs 1) The need of the clients are identified. 2) Client services are determined and established to stakeholders' satisfaction. 3) Relationship with stakeholders is maintained through a range of communications mechanism. 4) A service support structure is established and made known to clients.	**UNIT VARIABLES** **Client's needs** may include: 1) Increased productivity. 2) Increased enterprise profitability. 3) Attainment of specified industry or enterprise competencies. 4) Achievement of community priorities. 5) Achievement of government priorities. 6) Licensing or accreditation requirements. 5) Achieving GQL/EJL/SoA/RCPP
Element 2 – Determine assessment boundaries 1) The purposes of assessment system is established through consultation with the client and other stakeholders. 2) A policy document is developed in consultation with stakeholders and clients. 3) The financial , physical and human resources available to support the system are determined within agreed quality assurance procedures. 4) The system is verified to take into account the realities and constraints of particular context.	**Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities.
Element 3 – Establish assessment system features 1. The key operational features of the system are determined in consultation with stakeholders. 2) The key operational features of the system are verified and documented for fairness, equity and access with appropriate personnel.	**Key operational features** may include: 1) The purpose of assessment. 2) SS and certification required of assessors. 3) Record keeping procedures and policies. 4) Assessment evidence and procedures required. 5) Appropriate assessment methods selected. 6) Characteristics of the persons being assessed. 7) Any allowable adjustments to the assessment methods to meet the characteristics of persons being assessed. 8) Access and equity considerations. 9) The appeal mechanism and procedures. 10) The review and evaluation process. 11) **The link between general qualifications levels (GQL), employee classifications or JOB LEVELS (EJL), Remuneration and Career Path Progression (RCPP).** 12) Relevant government regulations. 13) Issuing of the General Qualifications Levels (GQL) or Statements of Attainment (SoA). 14) Partnership arrangement. 15) Location of training. 16) Quality Assurance procedures. 17) Allocations of costs/fees (if applicable). 18) Marketing & promotion.
Element 4 – Match needs with resources 1) Applicable SS or other performance standards are identified. 2) The expertise and roles of internal individuals and organizations/partners are identified. 3) A budget detailing development, implementation and maintenance costs of the proposed system is developed, including partner organizations (if applicable).	**Purpose of assessment** may include: 1) Diagnosing performance. 2) Evaluating or classifying or reviewing Employment Job Levels (EJL). 3) Evaluating/reviewing General Qualification Levels (GQL). 4) Awarding the Statement of Attainment (SoA). 5) Confirming progress of training. 6) RPL/RCC. **Operational constraints** may include: time available for assessment, relative costs involved, availability of assessors, availability of technical experts, availability of persons being assessed, and geographical locations of persons being assessed.
Element 5 – Design and develop record keeping system	**Quality assurance procedures** may include: a. conduct of regular internal and external reviews (persons being trained, peer, self, supervisor); b. professional development of participants; c. sampling and evaluation of implementations of SS; d. assessment of the assessors/trainers skills; e. modification of the skills system based on evaluation and reviews; f. promotion of regular networking amongst developers, assessors/trainers and peer review amongst persons responsible for planning, conducting and reviewing assessments/training within the system. **Sources of information** may include: organization SOP, benchmarking report,

1) The record keeping system is designed allow easy tracking of training participants' progress as well as other agreed features. 2) The record keeping system allows for the storage of detailed information and is designed to be secure, confidential, and easy to administer and update. 3) The record keeping system is developed to allow for appropriate certification requirements, where relevant. 4) The record keeping system is designed to ensure that relevant legislative and regulatory requirements are met. 5) The record keeping system is verified for consistency with accepted enterprise/industry procedures for record keeping.

Element 6 – Establish procedures for the review of assessment

1) Review procedures are developed and documented in consultation with stakeholders and verified to allow for fair and consistent responses to grievances. 2) Review procedures are designed to ensure that relevant legislative and regulatory requirements are met.

Element 7 – Select and provide for training and support of assessors

1) Selection criteria for assessors (or other types of assessors) are established in consultation with the appropriate personnel. 2) Appropriate training strategies or programs for assessors (or other types of assessor) to acquire or update assessment skills are identified, modified or developed. 3) Training programs selected or developed for assessors (or other types of assessors) are verified to meet the Assessment and Workplace Training SS and other required skills.

Element 8 – Establish quality assurance procedures

) A quality assurance team or committee is established in consultation with system stakeholders. 2) Quality assurance procedures, including verification processes are developed in consultation with system stakeholders. 3) The verification process involves a representative sample of assessment activities and makes effective use of resources. 4) The quality assurance procedures are trialed for fairness, efficiency and effectiveness. 5) The quality assurance procedures are documented and distributed to assessors/trainers and other appropriate personnel. 6) Procedures are established to determine the level of compliance with the assessment system.

industry and government publications/reports, labor market analysis report, enterprise job descriptions, observation of qualified workers, enterprise skills audit report, industry SS, training packages, curriculum & syllabus, licensing agreements.

Policy may include: purpose of training, human resources management issues, what/who to assess, timing of training, links with other HR functions, appeal/review mechanism, criteria for making decisions of COMPETENT or NOT YET COMPETENT, number of trainer, allowable adjustments suitable to the assessment process, record keeping requirements, recognition of prior learning RPL & RCC), development of cost and resources, and evaluation.

Characteristics of person being assessed may include: a. language, literacy and numerical needs; b. cultural, language and educational background; c. gender; d. age; e. physical ability; f. level of confidence, nervousness or anxiety; g. experience in assessment; h. previous experience with the topic.

Recording system may include: paper based system, computer based system or a combination of both.

ASSESSMENT GUIDE

1) Ability to demonstrate evidence of the **following products**: a. assessment policy; b. description of clients and stakeholders; c. description of assessment system boundaries; d. report on sources of information for determining the assessment system; e. report on the design, development, maintenance and security of the record keeping system; f. **summary of available financial, physical and appropriate certified /qualified human resources**; g. documented review procedures of assessment activities; h. documented assessor training and professional development strategies; i. documentation of quality assurance mechanism.

2) Ability to demonstrate evidence of the **following process**: a. why a particular assessment features were incorporated; b. how the record keeping system was designed to meet security and access requirements; c. how fairness, equity and accessibility of the system were verified; d. why and how the selection criteria for Assessors and other types of Assessors was chosen; e. how the review procedures were verified; f. how the quality assurance procedures were established, verified and implemented; g. how the currency of records and ease of retrieval are ensured; h. why procedures for promoting and communicating the assessment system were chosen/developed.

3) Required knowledge and skills to demonstrate: a. language and literacy skills to comprehend sources of information and to prepare required documentation in a clear and comprehensive format; b. knowledge of relevant industry/enterprise SS and performance criteria; c. knowledge of SS Assessment, SS Training and SS Based Assessment guidelines; d. knowledge of record keeping systems, particularly in relation to assessment; e. knowledge of quality assurance methodology; f. knowledge of compliance with the requirements for copyrights and other regulations; g. knowledge of client's work systems and equipment; h. identification of correct use of equipment, process and procedures; i. knowledge of review/evaluation/methodology, particularly as it relates to assessment.

4) Evidence of direct access to relevant clients, stakeholders and sources of information required to address skills and knowledge and to design and establish an SS Based assessment system.

5) Evidence of consistency in performance over a period of time, in a range of context and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence.

APEC SS 2.07.14.05

MANAGE SS BASED TRAINING AND ASSESSMENT SYSTEM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Communicate the system 1) System features and procedures are	**UNIT VARIABLES** **Appropriate personnel** may include: a. trainers/teachers/lecturers and assessors; b. team

documented and circulated to appropriate personnel. 2) Procedures are established for keeping appropriate personnel regularly informed about the key features of the training and assessment system. 3) Recognized products and services are accurately presented to prospective clients. 4) The contribution to training and assessment to organizational goals is reported.

Element 2 – Support trainers and/or assessors

1) Checks are made to ensure assessors and/or trainers meet the relevant SS and system requirements. 2) The training needs of trainers/assessors arising from their role are identified. 3) Procedures are developed for trainers /assessors to update skills and to review and reflect on their work. 4) Trainers/assessors are provided with accurate advice and on-going support in their roles. 5) Procedures to facilitate networking amongst trainers and assessors are established.

Element 3 – Manage the record keeping system

1) Records are maintained for currency and adherence to government regulation and organizational requirements. 2) The record keeping system is maintained to ensure confidentiality and security of information. 3) The record keeping system is reviewed and updated to meet the changing technology and system requirements.

Element 4 – Maintain quality assurance procedures

1) The quality assurance procedures are monitored against requirements and non conformities are noted down and appropriate action taken. 2) Internal audits of the training/assessment system are undertaken, non conformities are noted down and corrective action implemented. 3) Information from the quality assurance process is used to: a. enable appropriate planning, resourcing and recording arrangements; b. identify any special requirements of persons being trained / assessed; c. assess the training and development for trainers and assessors.

Element 5 – Maintain records for audits

1) Verification records are accurate and the frequency and purpose of audit are identified. 2) Accurate reports on audits and advisory activities are made available. 3) Reports describe accurately whether organization meets the required

leaders / supervisors / employees; c. training and assessment coordinators; d. participants / employees / learners / students; e. technical experts; f. government regulatory agencies; g. Union/Employee representatives; h. consultative committees; i. relevant industry training/assessment advisory body; j. users of training information: training providers, employers, HR Department; k. Government Recognition bodies.

Purpose of assessment may include: a. diagnosing performance; b. classifying/leveling employees; c. confirming employees for career/job level advancement; d. awarding SoA; e. confirming progress in learning; f. RCC/RPL; achieving GQL/EJL/RCPP.

Purpose of training may include: a. productivity/efficiency improvement; b. professional development requirements; c. skills acquisition; d. training of new employees; e. enrichment, refreshment or maintenance of employees skills; f. government requirements.

System may be developed by: the industry, the enterprise/organization, the training provider, authorized professional standards and certification agency, a combination of all the above criteria.

Policies may include: a. purpose of training and assessment; b. human resource management issues; c. who and what to be trained and assessed; c. timing of training and assessments; d. evidence types; e. assessment and training methods; f. record keeping requirements; g. RPL/RCC; h. development of costs and resources; i. evaluation.

Quality assurance procedures may include: a. conduct of regular, internal and external review on persons being assessed or trained / peer / self / supervisor / management of the system; b. professional development of participants; c. sampling and evaluation of implementation of skills; d. modifications of the SS Based evaluation and review process; e. promotion and marketing of the system.

Sources of information may include: available SS units; available training packages; General Qualification Level (GQL) or Employee Job Level (EJL); curriculum and syllabus; licensing requirements; government legislation; job descriptions; observation of professional workers; enterprise skills audit; workplace facilities and services; benchmarking report; industry publications/reports; labor market analysis reports; quality assurance procedures.

ASSESSMENT GUIDE

1) **Evidence to demonstrate the following products**: a. records which are current, and meet legislative and industry/enterprise requirements; b. a record keeping system which maintains confidentiality, is secure and effectively uses appropriate technology; c. documentation used to inform appropriate personnel about the training and assessment system; d. information on procedures for trainers and assessors to update personal skills and review and reflect on assessment and training issues and personal performances; e. documentation on the implementation of quality assurance procedures including monitoring of training and assessment system, an appeal procedure for assessment decisions, conduct of regular, internal and external reviews and evaluation, sampling and evaluation of judgments of evidence and assessment decisions and training effectiveness to check their fairness and accuracy; f. modifications of the system based on evaluation on reviews; g. referral of any recommended changes/modifications to the system.

2) **Evidence to demonstrate the following processes**: a. how opportunities are provided for trainers and assessors to practice and maintain current skills; b. how the security and confidentiality of records are maintained; c. how support is given to the implementation of quality assurance system; d. how networking is achieved amongst trainers and assessors; e. how the quality assurance procedures were implemented; f. how the quality assurance system were chosen for internal/external review of the training and assessment system; g. why any modifications are recommended to the training and assessment system; h. how the record keeping system is maintained including how it meets legislative and organizational requirements; i. why professional development strategies were chosen for trainers and assessors and how they were circulated and promoted.

3) **Evidence of required knowledge and skills**: a. language and literacy skills to comprehend sources of information and to prepare required documentation in a clear and comprehensive format; b. knowledge of relevant industry/enterprise SS and performance criteria; c. knowledge of SS Assessment and Training, SS Training and SS Based Assessment guidelines; d. knowledge of record keeping systems, particularly in relation to assessment; e. knowledge of quality assurance methodology; f. knowledge of compliance with the requirements for copyrights and other regulations; g. knowledge of client's work systems and equipment; h. identification of correct use of equipment, process and procedures; i. knowledge of review/evaluation/methodology, particularly as it relates to assessment; j. knowledge and application of audit procedures related to training and

criteria. 4) Concerns regarding the design and implementation of training/assessment and the interpretation of standards are clearly and promptly reported to the auditing body. 5) Identified good practices are reported accurately for future improvement purposes.	assessment systems. 4) Evidence of direct access to training and assessment system and relevant information and resources on the management and review process. 5) Evidence of consistency in performance over a period of time, in a range of context and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence.

APEC SS 2.07.15.05

EVALUATE SS BASED TRAINING AND ASSESSMENT SYSTEM

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Plan a system evaluation 1) The purpose and role of the evaluation is identified and confirmed with clients and stakeholders. 2) The system is defined in terms of location, purpose and personnel. 3) The needs of the stakeholders of the system are identified and prioritized. 4) The necessary resources for the evaluation are identified, obtained or developed. 5) The evaluation plan is agreed by the stakeholders, including: a. responsibility of appropriate personnel for conducting and participating in evaluations; b. evaluation criteria; c. responsibilities for implementation of the evaluation plans; d. means of protection of participants; e. agreement for data collection, storage and retrieval; f. procedures for editing and disseminating reports; g. agreement in finances for the evaluation. 6) The evidence required for making decisions about system improvement is established. 7) Evidence gathering instruments, procedures and sources of information are identified, developed and validated for reliability and validity. 8) Cost effective methods utilizing an appropriate evaluation model are linked to the purpose of the evaluation. **Element 2 – Conduct the evaluation** 1) Evidence is collected in accordance with agreed evaluation procedures. 2) The evidence is interpreted at the	**UNIT VARIABLES** **Client's needs** may include: 1) Increased productivity. 2) Increased enterprise profitability. 3) Attainment of specified industry or enterprise competencies. 4) Achievement of community priorities. 5) Achievement of government priorities. 6) Licensing or accreditation requirements. **Purpose of assessment** may include: 1) Diagnosing performance. 2) Evaluating or classifying or reviewing Employment Job Levels (EJL). 3) Evaluating/reviewing General Qualification Levels (GQL). 4) Awarding the Statement of Attainment (SoA). 5) Confirming progress of training. 6) RPL/RCC. **Purpose of training** may include: a. productivity/efficiency improvement; b. professional development requirements; c. skills acquisition; d. training of new employees; e. enrichment, refreshment or maintenance of employees skills; f. government requirements; g. access and equity considerations. **System may be developed by**: the industry, the enterprise/organization, the training provider, authorized professional standards and certification agency, a combination of all the above criteria. **Policy** may include: purpose of training, human resources management issues, what/who to assess, timing of training, links with other HR functions, appeal/review mechanism, criteria for making decisions of COMPETENT or NOT YET COMPETENT, number of trainer, allowable adjustments suitable to the assessment process, record keeping requirements, recognition of prior learning RPL & RCC), development of cost and resources, and evaluation. **Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities. **Operational constraints** may include: time available for assessment, relative costs involved, availability of assessors, availability of technical experts, availability of persons being assessed, and geographical locations of persons being assessed. **Sources of information** may include: available SS units; available training packages; General Qualification Level (GQL) or Employee Job Level (EJL); curriculum and syllabus; licensing requirements; government legislation; job descriptions; observation of professional workers; enterprise skills audit; workplace facilities and services; benchmarking report; industry publications/reports; labor market analysis reports; quality assurance procedures. **Evaluation methodology and report** may include: 1) Selection of appropriate evaluation models including: a. Stake mode; b. Stufflebeam (CIPP) model; c. Shriven model; d. Ethnographic model; e. Action Research model; f. The Portrayal approach. 2) Types of evidence to be collected may include: a. Affective e.g. satisfaction of the program; b. Cognitive e.g. knowledge of skills gain; c. Performance or Behavioral e.g. quality of work, productivity. 3) Resources may include: a. human personnel required to carry out the evaluation; b. physical resources e.g. equipment, materials, documents, facilities, assessment tools; c. financial amounts; d. in kind services; e. space & location. 4) Report formats may include: a. written reports; b. oral presentation; c. audio visual reports. 5) Evidence gathering instrument and procedures may include: a. survey instruments e.g. Delphi, questionnaire, diaries, log books, attitude, scales, diagnostics; b. interview schedules and records; c. observations. 6) Validating the data gathering process may include: a. detailing what to be measured; b. assessing the capacity of the instrument to collect sufficient, valid, reliable and current information; c. detailing how the instrument or procedures is administered, scored and interpreted in the particular evaluation; d. presenting both qualitative and quantitative evidence that justifies the use of the particular instrument or procedures; e. defending the validity of the use and interpretation of the information provided by the instrument or procedure. 7) Summarizing quantitative information may involved: charts, tablets, reports, videos, oral presentations & development of visual presentations

individual and aggregate levels and strengths and weaknesses of the system are identified.	including computer generated visual projections.
Element 3 – Report on evaluation findings	**ASSESSMENT GUIDE***
1) The differing communication needs of the stakeholders are identified. 2) A range of report formats on the evaluation are prepared to meet the differing needs of the stakeholders.	1) Ability to demonstrate evidence of the following products: a. description of clients and stakeholders; b. evaluation plan; c. list and review of information relevant to evaluation; d. description of evaluation method selected; e. evidence gathering instruments and procedures; f. evaluation reports.
Element 4 – Develop intervention strategies	2) Ability to demonstrate evidence of the following processes: a. how the client and stakeholders were identified; b. why the evaluation of the system was proposed; c. how the evaluation plan was developed and confirmed with clients and stakeholders; d. why a particular evaluation model and evidence gathering instruments were selected; e. how the evaluation was conducted; f. how the evaluation report was drafted and confirmed with client and stakeholders; g. how any changes to the system are to be implemented.
1) Key components of the changes required are identified and constraints and resources required for implementation are determined. 2) A review process for monitoring and evaluating changes and their effects is determined.	3) Required knowledge and skills: a. knowledge of program evaluation models; b. skills in applying evaluation model; c. skills in validating evaluation procedures; d. planning own work including predicting consequences and identifying improvements; e. compliance with requirements for copyrights and other regulatory requirements; f. language and literacy skills to collect and interpret relevant information and to communicate with client, stakeholders and others; g. application of cultural understanding in the workplace; h. skills in applying relevant workplace policies and procedures and any related legislation and regulatory requirements.
	4) Required skills and knowledge to evaluate SS Based training and assessment system.
	5) Consistency in performance over a period of time, in a range of context and on multiple occasions involving a combination of direct, indirect and supplementary forms of evidence.

APEC TO 2.07.16.05 (IDEM 2.03.XX.05)
ANALYZE SS REQUIREMENTS

ELEMENTS & PERFORMANCE CRITERIA	UNIT VARIABLES & ASSESSMENT GUIDE
Element 1 – Identify client SS needs	**UNIT VARIABLES**
1. The client and stakeholders are consulted to identify and document client SS needs. 2) Skill needs are defined using information collected from stakeholders. 3) The needs are grouped according to type, priority and possible solutions. 4) Client's EJL and/or RCPP are identified, assessed and documented.	**Client needs** may be increased productivity, increased enterprise profitability, attainment of specified industry or organization skills, achievement of community priorities, and regulation or licensing requirements, GQL / EJL / SoA / RCPP
Element 2 – Undertake needs analysis	**Stakeholders** may include: industry/professional/trade associations, trainers/teachers and assessors, team leaders/managers/employers, training and assessment coordinators, employees/students, technical/subject experts including language, literacy and numerical specialists, government bodies, union/employee representatives, consultative committees, relevant industry training advisory bodies, funding bodies, government recognition authorities.
1) Plan is developed for the needs analysis outlining: a. outcome; b. resources; c. timelines; d. responsibilities; e. target groups; f. sources of information. 2) Sources of information in relation to SS needs and the scope of skills are identified. 3) Data gathering methods are adapted and developed for efficient, reliable and valid information collection. 4) Any requirements of qualification or assessment or training recognition bodies are identified. 5) Information is collected, organized and analyze to identify skill components. 6) Grouping of SS is established to suit the requirements for skills development of the target groups.	**SS needs** may include: adaptation of industry SS to meet business goals, design or review of training programs, identification of productivity and other improvements, access and equity considerations, and human resources considerations (such as classification structure).
Element 3 – Confirm findings of research	**Data gathering methods** may include: surveys, interviews, Delphi procedures, nominal group techniques, concept mapping, focus group, job and task analysis, and analysis of assessment or training records.
1) Consultations with the stakeholders are conducted to verify research accuracy, usability within the intended context, and validity for the target groups. 2) Priorities for implementation of skill development are determined in terms of business goals, individual and organizational effectiveness, sources implication, cost benefit and lead time requirements. 3) Identified priorities and SS are documented and validated by stakeholders.	**ASSESSMENT GUIDE***
Element 4 – Document SS requirements	1) Ability to demonstrate competence and knowledge in: a. any relevant SS and assessment guidelines; b. relationship of the SS to any industrial agreement; c. understanding of data gathering needs analysis theory and methodology; d. language and literacy skills required to comprehend sources of information and to prepare required documentation in a clear and comprehensive format; e. planning of own work including predicting consequences and identifying improvements; f. compliance with requirements for copyright and other government regulations; g. communication
1) SS requirements are documented in a manner appropriate to client needs. 2) Combinations of SS are identified to match the required: a. business goals; b. job roles; c. skills related career path; d. employee classifications (where applicable); e. position descriptions; f. training programs; g. appraisal requirements; h.	

licensing or accreditation condition, if applicable. 3) Implementation plan is developed including: a. marketing and promotion; b. resource allocation; c. timelines. **Element 5 – Validate competencies and implementation plans** 1) Stakeholders are involved in the validation of documented SS and implementation plan and established processes are used to approve documentation. 2) Adjustments to documentation are made as required. 3) Documentation is approved through established process. 4) Any changes in related procedures, policies and processes are endorsed by stakeholders for implementation.	skills appropriate to the culture of the workplace. 2) Look for documented client SS needs: SS needs analysis plan, report of research into SS needs, classification of needs according to type, priority and possible solution, and documented plan. 3) Look for: a. how the clients and stakeholders were consulted to identify SS requirements; b. how the needs analysis and SS proposed will contribute to organizational effectiveness; c. why the particular data gathering methods were used; d. how the data gathering methods and any other instruments used were checked for validity, reliability, cost effectiveness, administration ease and appropriateness; e. how the implementation plan was developed.

EMPOWER Associates for APEC TWG, 2005