



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBADM307B Organise schedules**

**Revision Number: 1**

## BSBADM307B Organise schedules

### Modification History

Not applicable.

### Unit Descriptor

<b>Unit descriptor</b>	<p>This unit describes the performance outcomes, skills and knowledge required to manage appointments and diaries for personnel within an organisation, using manual and electronic diaries, schedules and other appointment systems.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
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### Application of the Unit

<b>Application of the unit</b>	<p>This unit applies to individuals employed in a range of work environments who provide administrative support to teams and individuals in the management of diaries, schedules and other appointment mechanisms.</p>
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### Licensing/Regulatory Information

Not applicable.

### Pre-Requisites

<b>Prerequisite units</b>		

## Employability Skills Information

<b>Employability skills</b>	This unit contains employability skills.
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## Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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## Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish schedule requirements	1.1. Identify <b><i>organisational requirements</i></b> and protocols for diaries and staff <b><i>planning tools</i></b> 1.2. Identify organisational procedures for different types of appointments 1.3. Determine personal requirements for <b><i>diary and schedule items</i></b> for individual personnel 1.4. Establish appointment priorities and clarify in discussion with individual personnel
2. Manage schedules	2.1. Identify <b><i>recurring appointments</i></b> and deadlines, and schedule these in accordance with individual and organisational requirements 2.2. Establish availability of attendees, and schedule new appointments in accordance with required time lines and diary commitments 2.3. Negotiate <b><i>alternative arrangements</i></b> and confirm when established appointments are changed 2.4. <b><i>Record appointments</i></b> and manage schedules in accordance with <b><i>organisational policy and procedures</i></b>

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

#### Required skills

- communication skills to discuss and confirm requirements and priorities of others and to question others to clarify information
- literacy skills to read a range of procedural texts and to write simple instructions
- negotiation skills to schedule appointments where there are competing demands
- numeracy skills to estimate time, plan accurately and keep records
- problem-solving skills to negotiate task distribution and timing for appointments with other members of the group
- time management skills to allow realistic time lines to schedule appointments.

#### Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
- anti-discrimination legislation
- ethical principles
- codes of practice
- privacy laws
- occupational health and safety (OHS)
- relationship between satisfactorily organising another person's schedule and achieving team goals
- responsibility that is involved in making arrangements for others.

## Evidence Guide

<b>EVIDENCE GUIDE</b>	
<p>The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.</p>	
<b>Overview of assessment</b>	
<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> <li>maintaining schedules which meet individual and organisational needs</li> <li>prioritising and negotiating competing demands.</li> </ul>
<b>Context of and specific resources for assessment</b>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>access to an actual workplace or simulated environment</li> <li>access to office equipment and resources</li> <li>access to a range of diaries, planners and calendars to record and schedule appointments.</li> </ul>
<b>Method of assessment</b>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate</li> <li>review of authenticated documents from the workplace or training environment</li> <li>analysis of responses to case studies and scenarios</li> <li>demonstration of techniques in a workplace or simulated environment</li> <li>review of testimony from team members, colleagues, supervisors or managers.</li> </ul>
<b>Guidance information for assessment</b>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> <li>other general administration units.</li> </ul>

## Range Statement

### RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<b><i>Organisational requirements</i></b> may include:	<ul style="list-style-type: none"> <li>• availability of information</li> <li>• electronic linked diaries and schedules</li> <li>• linking personal and executive diaries</li> <li>• priority clients and personnel</li> <li>• protocols in contacting other personnel within and outside organisation</li> <li>• recording systems</li> </ul>
<b><i>Planning tools</i></b> may include:	<ul style="list-style-type: none"> <li>• appointment book</li> <li>• appointment view and planner view in electronic scheduling systems</li> <li>• calendar</li> <li>• desk diary</li> <li>• electronic calendar or diary</li> <li>• in/out boards and whiteboards</li> <li>• manual planners</li> <li>• planning wall chart</li> </ul>
<b><i>Diary and schedule items</i></b> may include:	<ul style="list-style-type: none"> <li>• conferences</li> <li>• deadlines</li> <li>• leave (for both immediate person and others whose absence affects the person)</li> <li>• meetings</li> <li>• recurring appointments</li> <li>• teleconferences</li> <li>• travel</li> </ul>
<b><i>Recurring appointments</i></b> may include:	<ul style="list-style-type: none"> <li>• board meetings</li> <li>• committee meetings</li> <li>• staff meetings</li> </ul>
<b><i>Alternative arrangements</i></b> may include:	<ul style="list-style-type: none"> <li>• cancelling pre-arranged appointments</li> <li>• inserting additional appointments after a schedule has been prepared</li> <li>• re-scheduling existing appointments</li> </ul>
<b><i>Appointments</i></b> may be recorded in:	<ul style="list-style-type: none"> <li>• calendar</li> </ul>

<b>RANGE STATEMENT</b>	
	<ul style="list-style-type: none"> <li>• diary</li> <li>• electronic system</li> <li>• filing system</li> <li>• paper system</li> </ul>
<i>Organisational policy and procedures</i> may include:	<ul style="list-style-type: none"> <li>• adequate time between appointments</li> <li>• leave</li> <li>• limit on total appointments in any one day</li> <li>• lunch breaks</li> <li>• OHS issues</li> <li>• stress minimisation</li> <li>• sufficient time to complete projects and to meet deadlines</li> <li>• time off in lieu</li> </ul>

### Unit Sector(s)

<b>Unit sector</b>	
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### Competency field

<b>Competency field</b>	Administration - General Administration
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### Co-requisite units

<b>Co-requisite units</b>	