



| Competency | Performance Criteria | Evidence Guide |
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| <p>1: Write an organizational business plan.</p> | <p>1.1: The following key requirements of an organizational business plan are established:</p> <ul style="list-style-type: none"> • Timeframe • Vision and mission statements • Management and financial objectives • Supporting strategies • Coordination and administration • Financial plan (budget) • Risk management plan • Marketing plan • Format of the submission: formal document | <p>The timeframe must be realistic and reflect the ability of the organization to forecast market, service and or product dynamics.</p> <p>The vision and mission statements must clearly reflect the values, direction and focus on the organisation.</p> <p>The objectives must be measurable, and reflect achievement of the vision and mission. Key Performance Outcomes (KPOs) should be stated.</p> <p>There must be a supporting strategy for each objective. The strategy should state how the objective is to be achieved.</p> <p>Coordination of each strategy; phasing, timing etc, must accord to the key timeframe.</p> <p>Administration must include the resource allocation.</p> <p>The financial plan should cover the timeframe period and state forecast revenue, expenditure and net profit, normally on a monthly basis.</p> <p>The risk management plan. Refer to Competency 3.</p> <p>The marketing plan should detail how each service or product is to be 'sold' and delivered to the market(s).</p> <p>Reflect effective language use without grammar, spelling or typographical errors.</p> <p>The information presented shall be accurate.</p> |



Competency Unit:

RABQSA-OI – Advising on Organizational Improvement & Risk Management

Effective date: 1 January 2005

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| <p>2: Interpret financial statements.</p> | <p>2.1: The following financial documents are identified and interpreted:</p> <ul style="list-style-type: none"> • Profit and Loss (P&L) statement; • Balance Sheet; and • Cash Flow statement. | <p>State the purpose of each document.</p> <p>P&L Statement: Define; revenue, gross profit, direct and indirect expenditure, net profit and Estimate Before Income Tax (EBIT), and the correlation between each item.</p> <p>Define cash and non-cash items.</p> <p>Balance Sheet: Define; assets, liabilities, net assets and total equity, and the correlation between each item.</p> <p>Cash Flow Statement. Define; opening cash, receipts, payments, CAPEX, GST and closing cash items, and the correlation between each item.</p> <p>The information presented shall be accurate.</p> |



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| <p>3: Write a risk management plan.</p> | <p>3.1: The following key requirements for a risk management plan are established:</p> <ul style="list-style-type: none"> • Timeframe • Identified risks • Risk management objectives • Supporting risk management strategies • Coordination and administration • Financial plan (budget) • Risk audit plan • Format of the submission: formal document | <p>The timeframe must be realistic and reflect the ability of the organization to forecast market, service and or product dynamics.</p> <p>The identified risks must be as a result of a comprehensive risk audit, and reflect the risk to the organization of not achieving the objectives prescribed in the business plan.</p> <p>The objectives must be measurable, and reflect the risks identified in the risk audit. KPOs should be stated.</p> <p>There must be a supporting management strategy for each risk objective. The strategy should state how the objective is to be achieved.</p> <p>Coordination of each strategy; phasing, timing etc, must accord to the key timeframe.</p> <p>Administration must include the resource allocation.</p> <p>The financial plan should cover the timeframe period and state forecast expenditure in the application of the risk management plan, normally on a monthly basis.</p> <p>The risk audit plan should cover the timeframe; identify the risk(s) and nature/time of audit.</p> <p>Reflect effective language use without grammar, spelling or typographical errors.</p> <p>The information presented shall be accurate.</p> |



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| <p>4: Determine Human Resources (HR) best practice.</p> | <p>4.1: The following key requirements for HR are established:</p> <ul style="list-style-type: none"> • Timeframe • Identify personnel position descriptions, recruitment, training and development needs • HR objectives • Supporting HR strategies • Coordination and administration • Financial plan (budget) • HR audit plan • Format of the submission: formal document | <p>The timeframe must be realistic and reflect the ability of the organization to forecast market, service and or product dynamics, including staff turnover.</p> <p>The identified personnel requirements must be as a result of a comprehensive HR audit, and reflect the ability of the organization to achieve the objectives prescribed in the organizational business plan.</p> <p>The objectives must be measurable, and reflect the requirements identified in the HR audit. KPOs should be stated.</p> <p>There must be a supporting management strategy for each HR objective. The strategy should state how the objective is to be achieved.</p> <p>Coordination of each strategy; phasing, timing etc, must accord to the key timeframe.</p> <p>Administration must include the resource allocation.</p> <p>The financial plan should cover the timeframe period and state forecast expenditure in the application of the HR plan, normally on a monthly basis.</p> <p>The HR audit plan should cover the timeframe; identify the HR requirements and nature/time of audit.</p> <p>Reflect effective English without grammar, spelling or typographical errors.</p> <p>The information presented shall be accurate.</p> |

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| <p>5: Determine appropriate business improvement tools</p> | <p>5.1: Understand the underpinning methodology, strengths, weaknesses, projected outcomes, and application of the following business improvement tools:</p> <ul style="list-style-type: none"> • The ISO 9004:2000 Process Model; • 'Balanced Scorecard'; • 'Value Chain'; • 'Six Sigma'; or • other tools approved for recognition by RABQSA <p>A minimum of three tools.</p> | <p>Each organizational business improvement tool should be described as follows:</p> <ul style="list-style-type: none"> • Primary objective • Methodology • Deliverables in terms of outcomes • How the tool is normally applied/implemented. • Resource requirements and timings • Appropriateness of the tool to the organisation (matrix comparison) <p>Reflect effective language use without grammar, spelling or typographical errors.</p> <p>If delivered verbally the description shall be concise and without undue hesitation.</p> <p>The information presented shall be accurate.</p> |

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| <p>6: Communicate with senior management</p> | <p>6.1: Prepare a plan of action, utilizing a Microsoft PowerPoint medium or similar, for the implementation of an organizational improvement strategy. The plan should include the following key considerations:</p> <ul style="list-style-type: none"> • Timeframe • Assumptions/background • Objectives • Supporting strategies • Coordination and administration • Financial plan (budget) • Surveillance and audit plan | <p>Presentation: The presentation should highlight the key consideration, flow logically, facilitate and support the verbal presentation, and be easy to read and understand.</p> <p>Plan: The timeframe must be realistic and reflect the ability of the organization to implement and validate the achievement of the objectives. The assumptions/background information shall be sufficient to familiarize the attendees with the key considerations leading to the development of the plan. The objectives must be measurable. KPOs should be stated. There must be a supporting strategy for each objective. The strategy should state how the objective is to be achieved. Coordination of each strategy; phasing, timing etc, must accord to the key timeframe. Administration must include the resource allocation. The financial plan should cover the timeframe period and state forecast revenue, expenditure and net result in the application of the plan, normally on a monthly basis. The surveillance and audit plan should cover the timeframe; identify the KPO requirements and nature/time of audit. Reflect effective English without grammar, spelling or typographical errors. Verbal description shall be concise and without undue hesitation. The information presented shall be accurate.</p> |