This document comprises the endorsed component of the TAA04 Training and Assessment Training Package endorsed by the National Training Quality Council (NTQC) on 1 October 2004 and agreed by the Ministers. This Training Package is to be reviewed by 30 October 2007. It provides the introduction to the Training Package, including the Assessment Guidelines and the Qualifications Framework, and a listing of the units of competency.
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Preliminary Information

Important note to users
Training Packages are not static documents; they are amended periodically to reflect the latest industry practices and are version controlled. It is essential that the latest version is always used.

Version number conventions
The primary release Training Package is Version 1. When changes are made to a Training Package, sometimes the version number is changed and sometimes it is not, depending on the extent of the change. When a Training Package is reviewed it is a new Training Package for the purposes of version control. It will receive a new national code to reflect the year of endorsement and will be Version 1. The Training Package national code identifies the year of endorsement to help with version control – TAA04 means this Training Package was endorsed in 2004.

Check the version number before commencing training or assessment. Always use the latest version of a Training Package. This is Version 1 of the Training and Assessment Training Package (TAA04) – check whether this is the latest version by going to the National Training Information Service NTIS (www.ntis.gov.au) and locating information about the Training Package. Alternatively, contact Australian Training Products Ltd (www.atpl.net.au) or Innovation and Business Industry Skills Council trading as Innovation & Business Skills Australia  www.ibsa.org.au to confirm the latest version number.

The review date
The review date (shown on the title page and in the footer of each page) indicates when the Training Package is expected to be reviewed. The Training Package review date is not an expiry date. Endorsed Training Packages and their components remain current until they are reviewed or replaced.

Version modification history
The version details of this endorsed Training Package are in the table below. The latest information is at the top of the table.

<table>
<thead>
<tr>
<th>Version</th>
<th>Release Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>23/11/2004</td>
<td>Primary release – replaces BSZ98</td>
</tr>
</tbody>
</table>
Training and Assessment Training Package (TAA04) Summary

There are two qualifications in Training and Assessment Training Package (TAA04):

TAA40104 Certificate IV in Training and Assessment
TAA50104 Diploma of Training and Assessment

There are 39 units of competency in Version 1 of the Training and Assessment Training Package (TAA04) and 16 imported units. The units are grouped into eight Fields of Competence:

- Learning Environment – 5 units
- Learning Design – 7 units
- Delivery and Facilitation – 10 units
- Assessment – 6 units
- Training Advisory Services – 5 units
- Coordination, Management and Quality of Training and/or Assessment Services – 5 units
- Language Literacy and Numeracy Practice – 1 unit
- Imported Units –16.

Table 1 below sets out the TAA04 units by code and title in their Fields of Competence. Most units do not require achievement of other units as prerequisites or co-requisites, although this varies and the reader should note where prerequisites or co-requisites have been identified. With some units, advice has been provided which identifies the recommended achievement of another TAA unit or units prior to or in conjunction with undertaking the specific unit, particularly in a learning and assessment pathway. This recommended advice is set out in the final column of Table 1.

While most TAA units packaged in the Diploma do not require specific prerequisites, readers should note the general entry requirements for the TAA50104 Diploma of Training and Assessment.

Training and Assessment Training Package (TAA04) units and identified prerequisite and recommended unit relationships

<table>
<thead>
<tr>
<th>Unit code</th>
<th>Unit Title</th>
<th>Prerequisite units</th>
<th>Recommended prior or co-learning units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Environment Field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAAENV401A</td>
<td>Work effectively in vocational education and training</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAAENV402A</td>
<td>Foster and promote an inclusive learning culture</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAAENV403A</td>
<td>Ensure a healthy and safe learning environment</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAAENV404A</td>
<td>Develop innovative ideas at work</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAAENV501A</td>
<td>Maintain and enhance professional practice</td>
<td>nil</td>
<td>nil</td>
</tr>
</tbody>
</table>
### Learning Design Field

| Code     | Description                                                                 | Related | Related
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TAADES401A</td>
<td>Use Training Packages to meet client needs</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADES402A</td>
<td>Design and develop learning programs</td>
<td>nil</td>
<td>TAADES401A</td>
</tr>
<tr>
<td>TAADES501A</td>
<td>Design and develop learning strategies</td>
<td>nil</td>
<td>TAADES401A TAADES402A</td>
</tr>
<tr>
<td>TAADES502A</td>
<td>Design and develop learning resources</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADES503A</td>
<td>Research and design e-learning resources</td>
<td>nil</td>
<td>TAADES502A</td>
</tr>
<tr>
<td>TAADES504A</td>
<td>Develop and evaluate e-learning resources</td>
<td>nil</td>
<td>TAADES502A TAADES503A</td>
</tr>
<tr>
<td>TAADES505A</td>
<td>Research and develop competency standards</td>
<td>nil</td>
<td>TAADES401A</td>
</tr>
</tbody>
</table>

### Delivery and Facilitation Field

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Related</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAADEL301A</td>
<td>Provide training through instruction and demonstration of work skills</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADEL401A</td>
<td>Plan and organise group-based delivery</td>
<td>nil</td>
<td>TAADES402A (where program development and delivery planning are undertaken as single function)</td>
</tr>
<tr>
<td>TAADEL402A</td>
<td>Facilitate group-based learning</td>
<td>nil</td>
<td>TAADEL401A (where delivery planning and delivery implementation are carried out as single function)</td>
</tr>
<tr>
<td>TAADEL403A</td>
<td>Facilitate individual learning</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADEL404A</td>
<td>Facilitate work-based learning</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADEL405A</td>
<td>Coordinate and facilitate distance-based learning</td>
<td>nil</td>
<td>TAADEL402A</td>
</tr>
<tr>
<td>TAADEL501A</td>
<td>Facilitate e-learning</td>
<td>nil</td>
<td>TAADEL402A</td>
</tr>
<tr>
<td>TAADEL502A</td>
<td>Facilitate action learning projects</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAADEL503A</td>
<td>Provide advanced facilitation to support learning</td>
<td>TAADEL402A TAADEL403A plus one of: TAADEL404A TAADEL405A TAADEL501A TAADEL502A</td>
<td></td>
</tr>
<tr>
<td>TAADEL504A</td>
<td>Lead and coordinate training services</td>
<td>TAADES402A TAADES501A TAADEL401A TAADEL402A</td>
<td></td>
</tr>
<tr>
<td>Assessment Field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>------------------</td>
<td>------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>TAAASS301A</td>
<td>Contribute to assessment</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAAASS401A</td>
<td>Plan and organise assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAAASS402A</td>
<td>Assess competence</td>
<td></td>
<td>TAAASS401A (where planning and organising the assessment process and carrying out the assessment process are integrated functions)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAAASS403A</td>
<td>Develop assessment tools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAAASS404A</td>
<td>Participate in assessment validation</td>
<td>TAAASS402A</td>
<td>TAAASS401A TAAASS403A</td>
</tr>
<tr>
<td>TAAASS501A</td>
<td>Lead and coordinate assessment systems and services</td>
<td>TAAASS401A TAAASS402A TAAASS403A TAAASS404A</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Advisory Services Field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAATAS401A</td>
<td>Maintain information requirements of training and/or assessment organisations</td>
<td></td>
<td>TAAENV401A</td>
</tr>
<tr>
<td>TAATAS501A</td>
<td>Undertake organisational training needs analysis</td>
<td>nil</td>
<td></td>
</tr>
<tr>
<td>TAATAS502A</td>
<td>Prepare a tender bid</td>
<td>nil</td>
<td>BSBMGT503A</td>
</tr>
<tr>
<td>TAATAS503A</td>
<td>Manage contracted work</td>
<td>nil</td>
<td>BSBMGT504A</td>
</tr>
<tr>
<td>TAATAS504A</td>
<td>Facilitate group processes</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordination, Management and Quality of Training and/or Assessment Services Field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAACMQ501A</td>
<td>Develop training and/or assessment organisational policies and procedures</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAACMQ502A</td>
<td>Coordinate training and/or assessment arrangements for apprenticeships/traineeships</td>
<td>nil</td>
<td>TAADES401A TAADES402A TAADES501A</td>
</tr>
<tr>
<td>TAACMQ503A</td>
<td>Lead and conduct training and/or assessment evaluations</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAACMQ504A</td>
<td>Determine and manage scope of training and/or assessment services</td>
<td>nil</td>
<td>nil</td>
</tr>
<tr>
<td>TAACMQ505A</td>
<td>Lead a team to foster innovation</td>
<td>nil</td>
<td>nil</td>
</tr>
</tbody>
</table>
Language, Literacy and Numeracy Practice Field

<table>
<thead>
<tr>
<th>Unit code</th>
<th>Unit Title</th>
<th>Unit source</th>
<th>Prerequisite</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAALLN401A</td>
<td>Address language, literacy and numeracy issues within learning and assessment practice</td>
<td>nil</td>
<td>TAAENV401A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAAENV402A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAADEL403A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAADEL401A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAADEL402A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAADEL404A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAADEL405A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAAASS401A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAAASS402A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAAASS404A</td>
</tr>
</tbody>
</table>

Imported units in the Training and Assessment Training Package (TAA04) and identified prerequisite units

<table>
<thead>
<tr>
<th>Unit code</th>
<th>Unit Title</th>
<th>Unit source</th>
<th>Prerequisite</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSBMKG406A</td>
<td>Build client relationships</td>
<td>Business Services Training Package (BSTP)</td>
<td>nil</td>
</tr>
<tr>
<td>BSBCMN404A</td>
<td>Develop teams and individuals</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBCMN405A</td>
<td>Analyse and present research information</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBCMN409A</td>
<td>Promote products and services</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBAUD402A</td>
<td>Participate in a quality audit</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBMKG501A</td>
<td>Evaluate marketing opportunities</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBEBUS508A</td>
<td>Build a virtual community</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBMGT503A</td>
<td>Prepare budgets and financial plans</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBMGT504A</td>
<td>Manage budget and financial plans</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBMGT506A</td>
<td>Recruit, select and induct staff</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>SBHHR504A</td>
<td>Manage industrial relations policies and processes</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSBRKG502A</td>
<td>Manage and monitor business or records systems</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSFLM512A</td>
<td>Ensure team effectiveness</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>BSFLM514A</td>
<td>Manage people</td>
<td>BSTP</td>
<td>nil</td>
</tr>
<tr>
<td>CHCCAR501A</td>
<td>Provide careers guidance</td>
<td>Community Services Training Package</td>
<td>nil</td>
</tr>
<tr>
<td>PSPGOV504B</td>
<td>Undertake research and analysis</td>
<td>Public Sector Training Package</td>
<td>nil</td>
</tr>
</tbody>
</table>

Changes Resulting from the Review of the Training Package

The review of the Assessment and Workplace Training Package (BSZ98) resulted in a number of changes being made. The most obvious is the change in name to Training and Assessment Training Package (TAA04).

The new Package still has two qualifications but 39 new units of competency have been specifically developed and 16 units have been imported from other Training Packages. For a complete mapping of units and their content to the previous Training Package, see the detailed unit mapping information provided within the Package.
The review of the Training Package reworked all the previous content and entailed development of additional competencies.

**Changes to the qualifications include:**

The number of required units for Certificate IV has been increased from 8 to 14. The packaging allows for 2 elective units to be chosen.

The number of units for completion of the Diploma has been reduced from 13 to 12. The number of core units has increased from 4 to 5.

The revised Training Package covers a wider range of VET professionals, not just workplace trainers and assessors. It includes competencies for workplace or RTO based assessors, teachers/trainers, educationalists, support personnel and middle level technical managers.

<table>
<thead>
<tr>
<th>Qualification Code</th>
<th>Relationship</th>
<th>Comment in relation to the previous iteration of the Training Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAA40104</td>
<td>Replaces BSZ40198</td>
<td>Unit content and qualification packaging changed</td>
</tr>
<tr>
<td>TAA50104</td>
<td>Replaces BSZ50198</td>
<td>Unit content and qualification packaging changed</td>
</tr>
</tbody>
</table>

**Changes to units**

There are 39 new industry specific units developed as well as 16 units being imported for the Business Services, Community Services and the National Public Services Training Packages. The units provide more comprehensive advice in the Range Statements and Evidence Guides. Particular attention has been given to providing advice on assessment of competency and the collection of quality evidence to make determinations on whether competency has been achieved.

**Changes to Assessment Guidelines**

The Assessment Guidelines provide clearer advice including:
- a range of information and guidance relevant to assessors of this Training Package
- specific definition of the requirements to be a TAA assessor
- advice on responsibilities in determining competence
- advice on maintaining currency
- guidance on conducting assessment.
Overview of Training Packages

What is a Training Package?

A Training Package is an integrated set of nationally endorsed competency standards, Assessment Guidelines and Australian Qualifications Framework (AQF) qualifications for a specific industry, industry sector or enterprise.

Each Training Package:
• provides a consistent and reliable set of components for training, recognising and assessing people’s skills, and may also have optional support materials
• enables nationally recognised qualifications to be awarded through direct assessment of workplace competencies
• encourages the development and delivery of flexible training which suits individual and industry requirements, and
• encourages learning and assessment in a work-related environment, which leads to verifiable workplace outcomes.

How do Training Packages fit within the National Training Framework?

The National Training Framework (NTF) is made up of the nationally agreed quality arrangements for the vocational education and training (VET) system. These are the Australian Quality Training Framework (AQTF), and Training Packages endorsed by the National Training Quality Council (NTQC).

How are Training Packages developed?

Training Packages are developed by national Industry Skills Councils (ISCs), (formerly Industry Training Advisory Bodies), or enterprises to meet the identified training needs of specific industries or industry sectors. To gain national endorsement of Training Packages, developers must provide evidence of extensive consultation and support within the industry area or enterprise.

How do Training Packages encourage flexibility?

Training Packages describe the skills and knowledge needed to perform effectively in the workplace without prescribing how people should be trained.

Training Packages acknowledge that people can achieve vocational competence in many ways by emphasising what the learner can do, not how or where they learned to do it. For example, some experienced workers might be able to demonstrate competency against the units of competency, and even gain a qualification, without completing a formal training program.

With Training Packages, assessment and training may be conducted at the workplace, off-the-job, at a training organisation, during regular work, or through work experience, work placement, work simulation or any combination of these.

Who can deliver and assess using Training Packages?

Training and assessment using Training Packages must be conducted by a Registered Training Organisation (RTO) that has the qualifications or specific units of competency on its scope of registration, or that works in partnership with another RTO as specified in the AQTF Standards for Registered Training Organisations.
Training Package components

Training Packages are made up of mandatory components endorsed by the National Training Quality Council (NTQC) and optional support materials.

Training Package Endorsed Components

The nationally endorsed components include the Competency Standards, Assessment Guidelines and Qualifications Framework. These form the basis of training and assessment in the Training Package and, as such, they must be used.

Training Package endorsed components

Competency Standards

Each unit of competency identifies a discrete workplace requirement and includes the knowledge and skills that underpin competency as well as language, literacy and numeracy; and occupational health and safety requirements. The units of competency must be adhered to in training and assessment to ensure consistency of outcomes.

Assessment Guidelines

The Assessment Guidelines provide an industry framework to ensure all assessments meet industry needs and nationally agreed standards as expressed in the Training Package and the Standards for Registered Training Organisations. The Assessment Guidelines must be followed to ensure the integrity of assessment leading to nationally recognised qualifications.

Qualifications Framework

Each Training Package provides details of those units of competency that must be achieved to award AQF qualifications. The rules around which units of competency can be combined to make up a valid AQF qualification in the Training Package are referred to as the ‘packaging rules’. The packaging rules must be followed to ensure the integrity of nationally recognised qualifications issued.
Training Package support materials

The endorsed components of Training Packages are complemented and supported by optional support materials that provide for choice in the design of training and assessment to meet the needs of industry and learners.

Training Package support materials can relate to single or multiple units of competency, an industry sector, a qualification or the whole Training Package. They tend to fall into one or more of the categories illustrated below.

| Learning Strategy | Assessment Materials | Professional Development Materials |

Training Package support materials

Training Package support materials are produced by a range of stakeholders such as RTOs, individual trainers and assessors, private and commercial developers and government agencies.

Where such materials have been quality assured through a process of ‘noting’ by the NTQC, they display the following official logo. Noted support materials are listed on the National Training Information Service (NTIS), together with a detailed description and information on the type of product and its availability (www.ntis.gov.au).

NTQC Logo for Training Package Support materials

It is not compulsory to submit support materials for noting; any resources that meet the requirements of the Training Package can be used.

Explanation of Training Package codes

There are agreed conventions for the national codes used for Training Packages and their components. Always use the correct codes, exactly as they appear in the Training Package, and with the title always following the code.

Training Package codes

Each Training Package has a unique five-character national code assigned when the Training Package is endorsed, for example the code of this Training Package is TAA04. The first three characters identify the Training Package industry coverage and the last two characters identify the year of endorsement.
Qualification codes

Within each Training Package, each qualification has a unique eight-character code, for example TAA50104. The first three letters identify the Training Package; the first number identifies the qualification level; the next two numbers identify the position in the sequence of the qualification at that level; and the last two numbers identify the year in which the qualification was endorsed. (Where qualifications are added after the initial Training Package endorsement, the last two numbers may differ from other Training Package qualifications as they identify the year in which those particular qualifications were endorsed.)

Unit of competency codes

Within each Training Package, each unit of competency has a unique code. The unit of competency codes are assigned when the Training Package is endorsed, or when new units of competency are added to an existing endorsed Training Package.

A typical code is made up of up to 12 characters, normally a mixture of uppercase letters and numbers. In the Training and Assessment Training Package (TAA04), 10 characters have been used as in TAAENV401A. The first three characters signify the Training Package (TAA indicates it is the Training and Assessment Training Package) and up to 8 characters, are used to identify an industry sector, function or skill area. In this Training Package, the three letters following TAA in the code indicate the Field of Competence and the numerals indicate packaging arrangements within a qualification. Thus, TAAENV401A is from the Learning Environment Field and is packaged within the Certificate IV qualification. The last character is always a letter and identifies the unit of competency version. The ‘A’ in the example above indicates that this is the original unit of competency.

An incremented version identifier usually means that minor changes have been made. Typically this would mean that wording has changed in the Range Statement or Evidence Guide, providing clearer intent. Where changes are made that alter the outcome, a new code is assigned and the title is changed.

Explanation of Training Package titles

There are agreed conventions for titling Training Packages and their components. Always use the correct titles, exactly as they appear in the Training Package, and with the code always placed before the title.

Training Package titles

The title of each endorsed Training Package is unique and relates the Training Package’s broad industry coverage.

Qualification titles

The title of each endorsed Training Package qualification is unique. Qualification titles use the following sequence:

• firstly, the qualification is identified as either Certificate I, Certificate II, Certificate III, Certificate IV, Diploma or Advanced Diploma
• this is followed by the words ‘in’ for Certificates I to IV and ‘of’ for Diploma and Advanced Diploma
• then the industry descriptor follows.

For example:

• TAA40104 Certificate IV in Training and Assessment.

In some Training Package qualifications, the occupational or functional stream follows the industry descriptor in brackets.
**Unit of competency titles**

Each unit of competency title is unique. Unit of competency titles describe the competency outcome concisely, and are written in sentence case.

For example:

- *TAAENV402A Foster and promote an inclusive learning culture*
- *TAADEL501A Facilitate e-learning*
Introduction to the Training and Assessment Training Package (TAA04)

Overview

The Training and Assessment Training Package (TAA04) represents part of the continuing cycle of quality improvement in Training Packages.

The impact of this Training Package is wide-ranging, potentially affecting:

- individuals seeking to undertake training and assessment qualifications and units of competency
- individuals undertaking professional or staff development
- individuals seeking to extend, enhance and complement existing qualifications
- RTOs and staff intending to deliver and/or assess the Training and Assessment Training Package (TAA04)
- all RTOs and other organisations providing training and assessment to internal staff and/or external clients
- organisational quality management systems for training and assessment services
- the content of other Training Packages and training products through importation of TAA units
- the quality of implementation of those Training Packages
- the work of bodies and authorities that manage the VET system (via the nexus of this Training Package with key policies such as competency based training [CBT] and frameworks such as the NTF and the AQTF.

Who developed the Training and Assessment Training Package (TAA04)?

Business Services Training Australia (BSTA), developed the Training and Assessment Training Package (TAA04) to meet the competency development needs of individuals and organisations providing training and assessment services within the vocational education and training sector. As of July 2004, the Innovation and Business Industry Skills Council was declared with coverage for the educational industry.

The vocational education and training sector is responsible for developing the competence of individuals in areas of work required by industry, enterprises and organisations as well as providing general education for the community. It includes vocational education and training undertaken in industries, enterprises, government agencies, and community and school settings. The vocational education and training sector encompasses both recognised training leading to a qualification or Statement/s of Attainment under the AQF, and non-recognised training, such as in-house, product-based training.

The TAA04 Training and Assessment Package reflects the outcomes of the Review of the BSZ98 Training Package for Assessment and Workplace Training. It was developed in conjunction with contracted consultants, critical friends and the thousands of individuals and hundreds of organisations who contributed their time and input into the development process. The project was undertaken under the guidance of a Project Steering Committee comprising representatives of key stakeholders and a Reference Group comprising representatives of State and Territory Training Authorities and the Commonwealth government. Details are provided in the Acknowledgements section of this Training Package.
What does the Training and Assessment Training Package (TAA04) cover?

The Training and Assessment Training Package (TAA04) is designed to meet the current and future competency development and qualification needs of new and existing personnel working in a broad range of work functions and activities within vocational education and training. It provides a clear set of benchmarks to support both initial competency achievement and ongoing staff and professional development.

The Training and Assessment Training Package (TAA04) addresses a range of competency areas that represent the key areas of work undertaken within organisations that provide training and assessment services. Each of these broad areas is called a Field in the Training and Assessment Training Package (TAA04). Seven Fields have been identified with an eighth Field encompassing imported competency standards. The Fields are:

Field 1 – Learning Environment
Field 2 – Learning Design
Field 3 – Delivery and Facilitation
Field 4 – Assessment
Field 5 – Training Advisory Services
Field 6 – Coordination, Management and Quality of Training and/or Assessment Services
Field 7 – Language, Literacy and Numeracy Practice
Field 8 – Imported Units

The units have been packaged into two qualifications:

TAA40104 Certificate IV in Training and Assessment
TAA50104 Diploma of Training and Assessment.

Further details are set out in the relevant sections of the Training Package.

Key Features of the Training and Assessment Training Package (TAA04)

In developing the Training and Assessment Training Package (TAA04) a number of key features have emerged which are set out below.

Supporting multiple audiences and audience needs

The Training and Assessment Training Package (TAA04) provides significant choice and flexibility to suit a diverse audience with multiple competency development needs operating in a wide range of environments.

The audience may range from the ‘novice’ trainer or assessor who will be using this Training Package to develop specific competencies to commence training and/or assessment practices to experienced practitioners using the Training Package for ongoing professional development and career development.

The competency development needs of the audience may range from the competence required to deliver on-the-job instruction in a specific work area or for a piece of equipment, to the breadth of competence required of training and assessment staff employed in an RTO, to competence in learning product development, consultancy or coordination functions.

The audience also includes the range of organisations and operating contexts in which the Training Package might be used, ranging from an RTO, which might be a public provider, enterprise/organisation, commercial college, community provider, or school, to an organisation working in a partnership arrangement with an RTO, or an organisation that delivers non-recognised vocational education and training. The RTO audience is also diverse and includes TAFE institutes, private commercial colleges, enterprises, community organisations, group training companies and schools.
A critical aspect in developing this Training Package has been to ensure its relevance to this diversity of organisations. Some units may be more relevant to some operating contexts than others but the breadth of units ensures that all contexts have been addressed.

**Focus on learning**

The central focus of the Training and Assessment Training Package (TAA04) is the learner and the learning process with each Field of Competence directly or indirectly addressing this focus.

The Learning Environment Field includes units of competency related to creating a meaningful learning environment which includes the application of inclusive work practices, responsiveness to diversity, developing a culture that supports learning, ensuring a safe and healthy learning environment, developing and maintaining knowledge of the vocational education and training system, maintaining currency.

The Learning Design Field addresses competence in designing learning processes and learning products that enable the learner to learn.

The Delivery and Facilitation Field addresses the skills and knowledge needed to manage, guide, facilitate and monitor the learning process and to provide meaningful learning experiences.

The Assessment Field addresses the competence of measuring progress in learning and judging whether competence has been demonstrated.

The Training Advisory Services Field focuses on learner support and consultancy services in training and/or assessment which directly or indirectly impacts on learners and their needs.

The Coordination, Management and Quality of Training and/or Assessment Services Field focuses on the competence of coordinating trainers/assessors in their work with learners and in developing and coordinating systems for quality training and/or assessment services.

**Cohesiveness**

The Training and Assessment Training Package (TAA04) is designed as a cohesive and integrated Training Package. This is demonstrated in a number of ways.

Firstly, a number of critical units have been developed which stand alone but which can also be used to support the rest of the Training Package. These units address work outcomes that are essential for competent performance in a training and assessment environment as well as underpinning the competence defined in many other units within the Training and Assessment Training Package (TAA04).

These critical units comprise: *TAAENV401A Work effectively in vocational education and training*, *TAAENV402A Foster and promote an inclusive learning culture*, *TAAENV403A Ensure a healthy and safe learning environment*, and *TAADES401A Use Training Packages to meet client needs*. This is represented in the following diagram.
As an example of how cohesiveness and integration can be applied, *TAADEL402A Facilitate group-based learning* stands as a discrete unit of competence but it is also related to, supported by, and can be demonstrated in conjunction with, the outcomes and Performance Criteria set out in TAAENV401A, TAAENV402A, TAAENV403A and TAADES401A when Training Packages form the basis of delivery.

A safe learning environment is essential to delivery (TAAENV403A). Inclusivity and an environment that supports learning is critical to delivery (TAAENV402A) and operating effectively in the relevant training context (TAAENV401A) is necessary. A similar relationship exists with many other units in the Training and Assessment Training Package (TAA04).

Secondly, cohesiveness and integration is also achieved through interrelationships between the units within the Training Package to form sequential and/or complementary competency development. For example, while each unit can be undertaken separately, one or more of the following linkages could be established between these units.

*TAADES402A Design and develop learning programs*

\[\downarrow\]

*TAADEL401A Plan and organise group-based delivery*

\[\downarrow\]

*TAADEL402A Facilitate group-based learning*

Thirdly, integration occurs within each unit through the clearly defined connections between the Elements, Performance Criteria, Range Statement and Evidence Guide

In developing the units significant attention has been paid to ensuring that content defined in one part of the competency standard is reflected in the next part of the standard and so on to form a coherent whole.
Clear specifications
The Training and Assessment Training Package (TAA04) provides clear, detailed and robust unit specifications.

Details of the unit format and content definition are set out in the Introduction to the Competency Standards section on page 58. In summary, some of the features of the TAA unit design include:

• an application statement which provides a front-end overview of the unit’s focus, content, parameters, potential audience and relationship to other units
• clear and detailed definition of Performance Criteria including emphasis on relevant areas of knowledge and skill
• a detailed Range Statement that defines critical or significant aspects of the Performance Criteria and defines the possible meanings of various words, terms and phrases that are used in the Performance Criteria
• a detailed Evidence Guide with:
  - depth of definition in knowledge and skills identified as relevant to competent performance
  - definition and guidance on how the Key Competencies are applied as part of competence
  - identification of critical products and processes that can be used as evidence
  - generic guidance on assessment
  - specific guidance on the collection of evidence to support valid and sufficient assessment.

The inclusion of these specific evidence requirements was strongly supported by trainers, practitioners and assessors participating in the validation workshops and in the documented feedback.

Competency themes
The Training and Assessment Training Package (TAA04) has specific themes that permeate the units of competency. These themes include:

• supporting effective learning
• developing facilitation skills
• creating an effective learning environment
• fostering inclusivity
• managing cultural diversity
• encouraging collaborative processes
• fostering innovation
• meeting ethical and legal requirements
• outlining occupational health and safety roles and responsibilities
• managing own ongoing learning and professional development and currency
• achieving transferability across contexts, and
• maintaining continuous improvement.

Broadly focused qualifications
The decision to develop two broadly based qualifications came out of the development process. Earlier drafts suggested a greater range of qualifications for particular areas of work. These approaches were quickly abandoned following feedback which identified the potential
impacts including constriction of pathways and an artificial division within qualifications that did not reflect the realities and needs of work.

The decision of breadth over specificity will make the qualifications more relevant to the audience for the Training and Assessment Training Package (TAA04).

**Comprehensive Assessment Guidelines**

Because this Training Package addresses assessment as an area of vocational competence, the Training and Assessment Training Package (TAA04) Assessment Guidelines are unique.

The Assessment Guidelines provide clear and comprehensive advice for assessors of this Training Package about the requirements to be a TAA assessor, responsibilities in determining competence, conducting assessments, assessment pathways, maintaining currency and other considerations in assessment which need to be addressed.
TAA04 Training and Assessment
Training Package

Qualifications Framework
The Australian Qualifications Framework (AQF)

The AQF provides a comprehensive, nationally consistent framework for all qualifications in post-compulsory education and training in Australia. In the vocational education and training (VET) sector it assists national consistency for all trainees, learners, employers and providers by enabling national recognition of qualifications and Statements of Attainment.

Training Package qualifications in the VET sector must comply with the titles and guidelines of the AQF. Endorsed Training Packages provide a unique title for each AQF qualification which must always be reproduced accurately.

A brief overview of the AQF follows. For a full explanation of the AQF see the AQF Implementation Handbook, 3rd Edition 2002. You can download it from the Australian Qualifications Framework Advisory Board (AQFAB) website www.aqf.edu.au or obtain a hard copy by contacting AQFAB (ph: 03 9639 1606 or email: aqfab@curriculum.edu.au).

Qualifications

A qualification is defined as:

Formal certification, issued by a relevant approved body, in recognition that a person has achieved learning outcomes or competencies relevant to identified individual, professional industry or community needs.

AQF Implementation Handbook

In the vocational education and training sector, qualifications are based on nationally endorsed competency standards where they exist or on competency standards developed by the relevant industry, enterprise, community or professional group.

Training Packages can incorporate the following six AQF qualifications:

- Certificate I in
- Certificate II in
- Certificate III in
- Certificate IV in
- Diploma of
- Advanced Diploma of

On completion of the requirements defined in the Training Package, a Registered Training Organisation (RTO) may issue a nationally recognised AQF qualification. Issuance of AQF qualifications must comply with the advice provided in the AQF Implementation Handbook and the AQTF Standards for Registered Training Organisations, in particular Standard 10.

Statements of Attainment

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

Under the Standards for Registered Training Organisations, RTOs must recognise the achievement of competencies recorded on a qualification or Statement of Attainment and issued by other RTOs. Given this mutual recognition requirement, individuals can progressively develop competence and build towards a full AQF qualification.
AQF Guidelines and learning outcomes

The *AQF Implementation Handbook* provides a comprehensive guideline for each AQF qualification. A summary of the learning outcome characteristics and distinguishing features for each AQF qualification relevant to the Training and Assessment Training Package (TAA04) is provided below.

**Certificate IV**

**Characteristics of Learning Outcomes**

Breadth, depth and complexity of knowledge and competencies would cover a broad range of varied activities or application in a wider variety of contexts most of which are complex and non-routine. Leadership and guidance are involved when organising activities of self and others as well as contributing to technical solutions of a non-routine or contingency nature.

Performance of a broad range of skilled applications including the requirement to evaluate and analyse current practices, develop new criteria and procedures for performing current practices and provision of some leadership and guidance to others in the application and planning of the skills.

Applications involve responsibility for, and limited organisation of, others.

**Distinguishing Features of Learning Outcomes**

Do the competencies enable an individual with this qualification to:

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

**Diploma**

**Characteristics of Learning Outcomes**

Breadth, depth and complexity covering planning and initiation of alternative approaches to skills or knowledge applications across a broad range of technical and/or management requirements, evaluation and co-ordination.

The self directed application of knowledge and skills, with substantial depth in some areas where judgement is required in planning and selecting appropriate equipment, services and techniques for self and others.

Applications involve participation in development of strategic initiatives as well as personal responsibility and autonomy in performing complex technical operations or organising others. It may include participation in teams including teams concerned with planning and evaluation functions. Group or team co-ordination may be involved.

The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.
Distinguishing Features of Learning Outcomes
Do the competencies or learning outcomes enable an individual with this qualification to:
• demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas?
• analyse and plan approaches to technical problems or management requirements?
• transfer and apply theoretical concepts and/or technical or creative skills to a range of situations?
• evaluate information, using it to forecast for planning or research purposes?
• take responsibility for own outputs in relation to broad quantity and quality parameters?
• take some responsibility for the achievement of group outcomes?

Training and Assessment Training Package (TAA04) Qualifications
Two qualifications are included the Training and Assessment Training Package (TAA04). These are:
• TAA40104 Certificate IV in Training and Assessment
• TAA50104 Diploma of Training and Assessment

Training and Assessment Training Package (TAA04)
TAA40104 Certificate IV in Training and Assessment

Purpose:
The TAA40104 Certificate IV in Training and Assessment specifies the competencies required to deliver training in an industry area or area of subject matter expertise, and to conduct competency-based assessment in a range of contexts.

Qualification Requirements:
The TAA40104 Certificate IV in Training and Assessment comprises 14 units packaged as:

12 core units
PLUS
2 elective units

Core units

<table>
<thead>
<tr>
<th>Field</th>
<th>Unit code</th>
<th>Unit Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Environment</td>
<td>TAAENV401A</td>
<td>Work effectively in vocational education and training</td>
</tr>
<tr>
<td></td>
<td>TAAENV402A</td>
<td>Foster and promote an inclusive learning culture</td>
</tr>
<tr>
<td></td>
<td>TAAENV403A</td>
<td>Ensure a healthy and safe learning environment</td>
</tr>
<tr>
<td>Learning Design</td>
<td>TAADES401A</td>
<td>Use Training Packages to meet client needs</td>
</tr>
<tr>
<td></td>
<td>TAADES402A</td>
<td>Design and develop learning programs</td>
</tr>
<tr>
<td>Delivery and Facilitation</td>
<td>TAADEL401A</td>
<td>Plan and organise group-based delivery</td>
</tr>
<tr>
<td></td>
<td>TAADEL404A</td>
<td>Facilitate work-based learning</td>
</tr>
<tr>
<td></td>
<td>TAADEL403A</td>
<td>Facilitate individual learning</td>
</tr>
<tr>
<td>Assessment</td>
<td>TAAASS401A</td>
<td>Plan and organise assessment</td>
</tr>
<tr>
<td></td>
<td>TAAASS402A</td>
<td>Assess competence</td>
</tr>
<tr>
<td></td>
<td>TAAASS403A</td>
<td>Develop assessment tools</td>
</tr>
<tr>
<td></td>
<td>TAAASS404A</td>
<td>Participate in assessment validation</td>
</tr>
</tbody>
</table>
### Elective units
Select 2 elective units. Both electives can be selected from the list of units below. Alternatively, 1 of the 2 elective units can be selected from the TAA50104 Diploma of Training and Assessment, or any other Diploma or any other Certificate IV.

<table>
<thead>
<tr>
<th>Field</th>
<th>Unit code</th>
<th>Unit Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery and Facilitation</strong></td>
<td>TAADEL301A</td>
<td>Provide training through instruction and demonstration of work skills</td>
</tr>
<tr>
<td></td>
<td>TAADEL402A</td>
<td>Facilitate group-based learning</td>
</tr>
<tr>
<td></td>
<td>TAADEL405A</td>
<td>Coordinate and facilitate distance-based learning</td>
</tr>
<tr>
<td><strong>Learning Environment</strong></td>
<td>TAAENV404A</td>
<td>Develop innovative ideas at work</td>
</tr>
<tr>
<td><strong>Training Advisory Services</strong></td>
<td>TAATAS401A</td>
<td>Maintain information requirements of training and/or assessment organisations</td>
</tr>
<tr>
<td><strong>Language, Literacy and Numeracy Practice</strong></td>
<td>TAALLN401A</td>
<td>Address language, literacy and numeracy issues within learning and assessment practice</td>
</tr>
<tr>
<td><strong>Imported units</strong></td>
<td>BSBMKG406A</td>
<td>Build client relationships</td>
</tr>
<tr>
<td></td>
<td>BSBCMN404A</td>
<td>Develop teams and individuals</td>
</tr>
<tr>
<td></td>
<td>BSBCMN405A</td>
<td>Analyse and present research information</td>
</tr>
<tr>
<td></td>
<td>BSBCMN409A</td>
<td>Promote products and services</td>
</tr>
<tr>
<td></td>
<td>BSBAUD402A</td>
<td>Participate in a quality audit</td>
</tr>
</tbody>
</table>
TAA50104 Diploma of Training and Assessment

Purpose:
The TAA50104 Diploma of Training and Assessment specifies the competencies required to engage in advanced training and assessment practice which may also include competence in one or more of the following areas: development of training products, provision of training advisory and consultancy services and leadership and co-ordination of training and assessment services.

Entrants to the Diploma must have the core units of the TAA40104 Certificate IV in Training and Assessment or be able to demonstrate equivalent competence.

Qualification Requirements:
The TAA50104 Diploma of Training and Assessment comprises 12 units packaged as:

5 core units
PLUS
7 elective units

Core units

<table>
<thead>
<tr>
<th>Field</th>
<th>Unit code</th>
<th>Unit Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Environment</td>
<td>TAAENV501A</td>
<td>Maintain and enhance professional practice</td>
</tr>
<tr>
<td>Learning Design</td>
<td>TAADES501A</td>
<td>Design and develop learning strategies</td>
</tr>
<tr>
<td>Delivery and Facilitation</td>
<td>TAADEL503A</td>
<td>Provide advanced facilitation to support learning</td>
</tr>
<tr>
<td>Assessment</td>
<td>TAASS501A</td>
<td>Lead and coordinate assessment systems and services</td>
</tr>
<tr>
<td>Coordination, Management and Quality of Training and/or Assessment Services</td>
<td>TAACMQ503A</td>
<td>Lead and conduct training and/or assessment evaluations</td>
</tr>
</tbody>
</table>
Elective units

Select 7 electives. A minimum of 5 units must be TAA coded units packaged within the Diploma listed below. Up to 2 of the 7 elective units may be selected from the identified imported units listed below or from any other Diploma qualification.

1 of the 2 elective units may be selected from TAA40104 Certificate IV in Training and Assessment electives or from any other Certificate IV.

<table>
<thead>
<tr>
<th>Field</th>
<th>Unit code</th>
<th>Unit Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Design</strong></td>
<td>TAADES502A</td>
<td>Design and develop learning resources</td>
</tr>
<tr>
<td></td>
<td>TAADES503A</td>
<td>Research and design e-learning resources</td>
</tr>
<tr>
<td></td>
<td>TAADES504A</td>
<td>Develop and evaluate e-learning resources</td>
</tr>
<tr>
<td></td>
<td>TAADES505A</td>
<td>Research and develop competency standards</td>
</tr>
<tr>
<td><strong>Delivery and Facilitation</strong></td>
<td>TAADEL501A</td>
<td>Facilitate e-learning</td>
</tr>
<tr>
<td></td>
<td>TAADEL502A</td>
<td>Facilitate action learning projects</td>
</tr>
<tr>
<td></td>
<td>TAADEL504A</td>
<td>Lead and coordinate training services</td>
</tr>
<tr>
<td><strong>Training Advisory Services</strong></td>
<td>TAATAS501A</td>
<td>Undertake organisational training needs analysis</td>
</tr>
<tr>
<td></td>
<td>TAATAS502A</td>
<td>Prepare a tender bid</td>
</tr>
<tr>
<td></td>
<td>TAATAS503A</td>
<td>Manage contracted work</td>
</tr>
<tr>
<td></td>
<td>TAATAS504A</td>
<td>Facilitate group processes</td>
</tr>
<tr>
<td><strong>Coordination, Management and Quality of</strong></td>
<td>TAACMQ501A</td>
<td>Develop training and/or assessment organisational policies &amp;</td>
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<tr>
<td><strong>Training and/or Assessment Services</strong></td>
<td></td>
<td>procedures</td>
</tr>
<tr>
<td></td>
<td>TAACMQ502A</td>
<td>Coordinate training and/or assessment arrangements for</td>
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<tr>
<td></td>
<td></td>
<td>apprenticeships/traineeships</td>
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<tr>
<td></td>
<td>TAACMQ504A</td>
<td>Determine and manage scope of training and/or assessment</td>
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<td>services</td>
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<tr>
<td></td>
<td>TAACMQ505A</td>
<td>Lead a team to foster innovation</td>
</tr>
<tr>
<td><strong>Imported units</strong></td>
<td>BSBMKG501A</td>
<td>Evaluate marketing opportunities</td>
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<td></td>
<td>BSBEBUS508A</td>
<td>Build a virtual community</td>
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<td></td>
<td>BSBMGT503A</td>
<td>Prepare budgets and financial plans</td>
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<tr>
<td></td>
<td>BSBMGT504A</td>
<td>Manage budgets and financial plans</td>
</tr>
<tr>
<td></td>
<td>BSBMGT506A</td>
<td>Recruit, select and induct staff</td>
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<td>BSBHR504A</td>
<td>Manage industrial relations policies and processes</td>
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<tr>
<td>BSBRKG502A</td>
<td>Manage and monitor business or records systems</td>
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<td>BSBFLM512A</td>
<td>Ensure team effectiveness</td>
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<td>BSBFLM514A</td>
<td>Manage people</td>
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<td>CHCCAR501A</td>
<td>Provide careers guidance</td>
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<td>PSPGOV504B</td>
<td>Undertake research and analysis</td>
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Vocational competence to deliver the Training and Assessment Training Package (TAA04) qualifications and units of competency

The vocational competence of this Training Package is training and assessment. Accordingly, persons who deliver recognised training in the Training and Assessment Training Package (TAA04), through or on behalf of a Registered Training Organisation, must be able to demonstrate their vocational competence in training delivery and assessment. The benchmarks for demonstration of this vocational competence are the relevant competency standards of the Training and Assessment Training Package (TAA04) or have equivalent competence.

The following vocational competence requirements apply to persons delivering training services for the Training and Assessment Training Package (TAA04) including training services relating to the delivery of qualifications and the delivery of individual endorsed units of competency.

1. Persons who deliver training for the Certificate IV in Training and Assessment (TAA40104) must hold formal recognition of competence in the Certificate IV in Training and Assessment (TAA40104) or have equivalent competence.

2. Persons who deliver training for the Diploma of Training and Assessment must hold formal recognition of competence in the TAA50104 Diploma of Training and Assessment (TAA50104) or have equivalent competence.

3. Persons who deliver training in any unit in the Training and Assessment Training Package (TAA04) must hold formal recognition of competence in that unit which they wish to deliver or demonstrate equivalent competence.

4. All persons delivering training in the Training and Assessment Training Package (TAA04) must:
   a) demonstrate current knowledge and skill in training delivery. This could be met by a combination of evidence including:
      • relevant work history
      • attendance at professional development activities focusing on best practice in assessment and/or workplace training
      • colleague/peer support
      • participation in networks/communities of practice
      • recent assessment and workplace training activities
      • knowledge of language, literacy and numeracy issues in the context of assessment and workplace training.
      and
   b) have current knowledge of the industry and workplace of the TAA04 learners/candidates. This would include:
      • familiarity with the industry/enterprise competency standards to be used by the learner/candidate as the basis of assessment and/or training
      • an understanding, where applicable of the training and/or assessment system in which the learner/candidate operates
      • knowledge of the requisite assessor qualifications for the industry or enterprise.
TAA04 Training and Assessment Training Package

Assessment Guidelines
Assessment System Overview

Quality assessment underpins the credibility of the vocational education and training system. The Assessment Guidelines of a Training Package are an important tool in supporting quality assessment.

These Assessment Guidelines provide the endorsed framework for assessment relating to the Training and Assessment Training Package (TAA04). They are designed to ensure that assessment is conducted in accordance with the assessment requirements of the units of competency in this Training Package and any other requirements outlined herein.

The advice in these Assessment Guidelines is directed at assessors (referred to as TAA assessors) who are responsible for assessing the competence of individuals (referred to as TAA candidate/s) against the units of competency in this Training Package.

TAA assessors are at the frontline, determining the competence of those who will subsequently work as trainers and/or assessors for Registered Training Organisations (RTOs), enterprises and other organisations involved in the provision of training and/or assessment services. These Assessment Guidelines provide support and guidance to TAA assessors carrying out this work.

These guidelines are not directed at the TAA candidates who must, themselves, plan, conduct and validate assessments to achieve the Training and Assessment Training Package (TAA04) units in the assessment field.

Assessments for the Training and Assessment Training Package (TAA04) must be carried out in accordance with the:

- benchmarks for assessment (below)
- Principles of assessment (below)
- rules of evidence
- assessment requirements set out in the AQTF Standards for Registered Training Organisations.

Benchmarks for assessment

The endorsed units of competency in this Training Package are the benchmarks for assessment. As such, they provide the basis for nationally recognised AQF qualifications and Statements of Attainment issued by RTOs.

Principles of assessment

All assessments carried out by RTOs are required to demonstrate compliance with the four principles of assessment:

- validity
- reliability
- fairness
- flexibility

These principles of assessment must be addressed in the:

- design, establishment and management of the assessment system for the Training and Assessment Training Package (TAA04)
- development of assessment tools and
- the conduct of assessment.
The assessment principles and their application to the Training and Assessment Training Package (TAA04) competency standards are elaborated below.

**Validity**

Assessment is valid when the process assesses what it claims to assess. For this to happen, the assessor must ensure:

- the outcomes and performance requirements of the unit are addressed
- the broad range of skills and knowledge that are essential to competent performance are addressed
- assessment of knowledge and skills is integrated with their practical application
- sufficient evidence is collected. Evidence should be gathered on a number of occasions and in a range of contexts, using different assessment methods. The specific evidence requirements of the Training and Assessment Training Package (TAA04) units provide advice relating to sufficiency
- judgement of competency incorporates the requirements of validity.

The validity of assessment for the Training and Assessment Training Package (TAA04) is enhanced when TAA assessors:

- sample a sufficient range of the performance of the TAA candidate
- assess tasks/activities in the workplace
- obtain evidence of performance after the assessment to support predictive validity
- gather evidence of transferability to new situations
- use assessment tools that document workplace performance
- use multiple approaches to assessment
- address the dimensions of competency in the assessment process.

**Reliability**

Reliability refers to the consistency of the interpretation of evidence and the consistency of assessment outcomes. Reliability can only be achieved when assessors share a common interpretation of the unit(s) being assessed. The Training and Assessment Training Package (TAA04) units have been written to support clear and unambiguous interpretations of the assessment requirements.

For assessment to be reliable, the assessor must:

- use clearly defined benchmarks for assessment
- be able to interpret those benchmarks for assessment information and requirements
- adhere to those benchmarks in the assessment process
- monitor and review own and others assessment decisions to ensure consistency of judgement

The reliability of assessment for the Training and Assessment Training Package (TAA04) is enhanced when TAA assessors:

- compare assessment decisions (moderation)
- collect evidence via a number of different assessment methods
- collect evidence across different locations and times
- specify clearly the competencies to be attained (documentation)
- detail clearly the items used on self/peer/supervisor assessment documentation
- take care in the construction of assessment tools (systematic procedures)
- review the training of assessors (systematic procedures).
Evidence of consistency can be obtained by assessing on multiple occasions, and by using a number of methods of evidence gathering in a range of contexts.

**Fairness**

Assessment is fair when the assessment process is clearly understood by candidates and agreed by both assessors and candidates and when candidates’ needs and characteristics are addressed. For assessment to be fair, the TAA assessor must:

- provide TAA candidates with clear, accurate and relevant information about the assessment process including assessment purpose, benchmarks, assessment tools, materials, methods, evidence requirements and review/appeals processes
- enable TAA candidates to prepare and agree on the assessment process
- provide for recognition and self-assessment of readiness for assessment
- take into account the characteristics of TAA candidates
- apply reasonable adjustments, where appropriate, depending on the characteristics of TAA candidates and explain reasons for not making adjustments
- document the assessment process and provide feedback to candidates.

To be fair, assessment needs to:

- be clearly based on the requirements of the Training and Assessment Training Package (TAA04) competency benchmarks
- not include additional requirements to the Training and Assessment Training Package (TAA04) competency benchmarks
- involve a participatory approach to assessment that is agreed to by the TAA assessor and the TAA candidate
- document evidence requirements that are clear to TAA candidates
- be equitable to all TAA candidates which may require making reasonable adjustments
- be objective and inclusive, free from discrimination and bias
- provide opportunities that allow TAA candidates to challenge assessments and with provision for reassessment.

Care must be taken to ensure assessment practices do not perpetrate possible workplace discriminatory practices. As well, assessors must not use the assessment to coerce personal or professional favours or to gain economic advantage from TAA candidate/s or potential client groups.

Personal or interpersonal biases held by TAA candidates and/or the TAA assessor, for example, race, gender, language background, religious background, political affiliation, sexual orientation, physical disabilities, physical appearances, marital status, age, skin colour, social class and/or ethnic background, should never interfere with the assessment process or decision.

Fairness applies to the assessment process – not the standard to be met. Adjusting the competency standard beyond what is ‘reasonable adjustment’ can affect the validity of the assessment. Reasonable adjustment is discussed later in these Guidelines.

Fairness in assessment can be compromised where a conflict of interest arises for assessors. Any conflict of interest should always be declared. Potential forms of conflict of interest in the assessment process and/or outcome may include:

- pre-established, personal relationship between the assessor and the candidate
- financial implications for the assessor
- employment opportunities for the assessor
• power opportunities for the assessor.

Referrals for opinions to other internal assessor/s or to external assessor/s can help to establish fair practice. The referrals may involve informal verbal consideration, a formalised written document, or a combination of the two. Validation also provides a vehicle to enable assessors to verify their assessment practices.

**Flexibility**

Flexibility in assessment involves consideration of the various needs of the parties involved in the assessment process. To be flexible, assessments should:

- reflect the needs of TAA candidates and other parties impacted by the assessment process
- be accessible to TAA candidates in terms of timing and readiness
- provide for the recognition of competencies no matter how, where or when they have been acquired
- draw on a range of methods and be appropriate to the context and TAA candidates’ characteristics
- enable progression from one competency standard to another.

Flexibility applies to the assessment process – not the competency standard. Providing for flexibility must be balanced to ensure validity of the assessment.

**Rules of evidence**

The rules of evidence guide the collection of evidence that address the principles of validity and reliability, guiding the collection of evidence to ensure that it is valid, sufficient, current and authentic.

**Validity**

Valid evidence must relate directly to the requirements of the competency standard. In ensuring evidence is valid, assessors must ensure that the evidence collected supports demonstration of the outcomes and performance requirements of the competency standard together with the knowledge and skills necessary for competent performance. Valid evidence must encapsulate the breadth and depth of the competency standard. This will necessitate using a number of different assessment methods.

**Sufficiency**

Sufficiency relates to the amount of evidence collected. The collection of sufficient evidence is necessary to ensure all aspects of the competency standard have been captured and to satisfy the need for repeatable performance. Supplementary sources of evidence may be necessary.

**Currency**

Currency relates to the age of collected evidence. Competency requires demonstration of current performance – therefore the evidence collected or provided must be recent. This is particularly relevant when TAA candidates seek to recognition of existing competence through an assessment only pathway. This issues is discussed later in these Guidelines.

**Authenticity**

Authenticity relates to ensuring the evidence is from the TAA candidate and not another person. Where evidence relies on indirect or supplementary forms of evidence or the direct evidence is not directly observable other complementary evidence that supports authenticity may need to be provided.
Advice is provided to TAA assessors relating to the collection of evidence in the Evidence Guide of the units of competency, particularly through the sections entitled Overview of Assessment, Collection of quality evidence requirements and specific evidence requirements.

**AQTF requirements for assessment**

Compliance with the Training and Assessment Training Package (TAA04), as required by the AQTF, will be rigorously enforced by State Recognition Authorities.

*The AQTF Standards can be downloaded from the ANTA website at <www.anta.gov.au> or can be obtained in hard copy from ANTA.*
Assessment Pathways in the Training and Assessment Training Package (TAA04)

The competencies in this Training Package may be attained in a number of ways including:

• formal or informal learning experiences
• work experiences
• general life experiences, and/or
• any combination of the above.

To be awarded a Training and Assessment Training Package (TAA04) qualification or Statement of Attainment, recognition of achievement of these competencies requires a formal process of assessment which:

• takes place as part of a learning and assessment pathway involving formative and summative assessment activities or
• is the focus of an assessment only pathway or
• can occur as a combination of the two where the TAA candidate achieves competency recognition for some units through an assessment pathway involving skills recognition, followed by achievement of others through a learning and assessment pathway.

The following diagram illustrates this process:

Learning and Assessment Pathways

Units of Competency

Assessment Pathways

Assessment, by any pathway, must comply with the assessment requirements set out in the AQTF Standards for Registered Training Organisations.

Learning and Assessment pathway

Where the focus of the TAA candidate is on gaining new competencies, a learning and assessment pathway will be the most common and relevant pathway to be accessed.

In the context of the Training and Assessment Training Package (TAA04) this will be the most widespread approach for TAA candidates who have no previous training experience or educational background.

The learning strategies and/or learning programs developed within this pathway must represent and include all aspects of the Training and Assessment Training Package (TAA04) unit specifications, including the performance requirements, Evidence Guide requirements and the dimensions of competence.
Assessment Only pathway

This pathway has many names – Assessment Only, Skills Recognition, Recognition of Current Competence (RCC) and Recognition of Prior Learning (RPL). These are all terms used interchangeably within the vocational education and training sector when referring to this pathway. This Training Package uses the term Assessment Only to describe assessments conducted through this pathway.

Where the focus of the TAA candidate is on gaining recognition for existing competencies, the assessment only pathway will be the most relevant. TAA candidates with prior training and/or assessment experience and/or other training and educational qualifications will be best placed to use this pathway.

As with all assessments, the TAA assessor must be confident that the evidence presented indicates that TAA candidates using this pathway are currently competent against all components of the endorsed Training and Assessment Training Package (TAA04) units of competency and that the evidence provided by TAA candidates meet all the rules of evidence.

Combination of pathways

Where TAA candidates demonstrate current competencies through a mix of previous certification and/or work and life experience but also indicate gaps in their competence, a combination of pathways may be appropriate.

In such situations, TAA candidates may undertake an initial assessment to determine their current level of competence. Competencies identified as gaps or partial gaps can be developed through further learning and assessment.
TAA Assessors – Requirements and Responsibilities

This section outlines the requirements and responsibilities of TAA assessors, including specified competency requirements to assess, the need to maintain currency in assessment practice, responsibilities in making assessment judgements, and adherence to the assessors’ ‘code of practice’.

Competency requirements of TAA assessors

The vocational competence of this Training Package is training and assessment. Accordingly, persons who deliver recognised training in the units of competency and the qualifications of the Training and Assessment Training Package (TAA04), through or on behalf of a Registered Training Organisation, must be able to demonstrate their vocational competence in training and assessment. The benchmarks for demonstration of this vocational competence are the relevant competency standards of the Training and Assessment Training Package (TAA04) or have equivalent competence.

The following vocational competence requirements apply to persons providing assessment services for the Training and Assessment Training Package (TAA04) including assessments relating to TAA04 qualifications and individual TAA04 endorsed units of competency.

- Persons who conduct assessments against the units of competency leading to the award of the Certificate IV in Training and Assessment must have the Certificate IV in Training and Assessment (TAA40104) or have equivalent competence.
- Persons who conduct assessments against the units of competency leading to the award of the Diploma of Training and Assessment must hold formal recognition of competence in the TAA50104 Diploma of Training and Assessment or have equivalent competence.
- Persons who conduct assessments of candidates against individual units of competency from the Training and Assessment Training Package (TAA04) must hold formal recognition of competence in each unit in which they wish to conduct assessment or be able to demonstrate equivalent competence.

All persons conducting assessments against the competency standards in the Training and Assessment Training Package (TAA04) must:

a) demonstrate current knowledge and skill in assessment practice. This could be met by a combination of evidence including:

- relevant work history
- attendance at professional development activities focusing on best practice in assessment and/or workplace training
- colleague/peer support and participation in trainer/assessor and/or professional networks
- participation in networks/communities of practice
- participation in moderation, validation activities
- knowledge of current practices in assessment and workplace training
- recent assessment and workplace training activities
- knowledge of language, literacy and numeracy issues in the context of assessment and workplace training.

and

b) have current knowledge of the industry and workplace of the TAA learners/candidates. This would include:

- familiarity with the industry/enterprise competency standards to be used by the learner/candidate as the basis of assessment and/or training
• an understanding, where applicable of the training and/or assessment system in which the learner/candidate operates
• knowledge of the requisite assessor qualifications for the industry or enterprise.

Responsibilities of TAA assessors

TAA assessors have a significant responsibility. Their judgement certifies that TAA candidates have demonstrated the Training and Assessment Training Package (TAA04) competency standards to the standard required in the workplace. Once qualified, this recognition can be used to work in a variety of training and/or assessment contexts and industries, including delivery and assessment of the Training and Assessment Training Package (TAA04).

In making the judgement of competence against the TAA units of competency, TAA assessors must evaluate the evidence and assess the risks. Constraints and pressures are widespread – time, cost, the demand for a quick outcome – but compromise and diminution of the Training and Assessment Training Package (TAA04) unit requirements are not viable options.

Faithful adherence to the content and intent of the Training Package in the assessment process is critical to ensuring the vocational education and training systems is staffed by competent trainers, assessors and VET practitioners.

Maintaining currency

TAA assessors also have a responsibility to maintain currency in all areas of their own vocational competence in training and/or assessment practice. This includes continuing currency in assessing against the Training and Assessment Training Package (TAA04) competency standards. This means that TAA assessors must be able to provide evidence of their ongoing TAA training and/or assessment practice.

Currency also includes maintaining professional knowledge about the vocational education and training sector, particularly developments relating to the vocational education and training operating environment and changes in training and assessment policies and practices.

Code of Practice for assessors

The Code of Practice detailed below is included in these Assessment Guidelines to support professionally responsible and ethical assessment practice and to guide TAA assessors in the responsibilities of their work. This code is loosely based on an international code developed by the National Council for Measurement in Education.

The code reinforces the performance outcomes of the Training and Assessment Training Package (TAA04) assessment units.

• The differing needs and requirements of the candidates, the local enterprise/s and/or industry are identified and handled with sensitivity.
• Potential forms of conflict of interest in the assessment process and/or outcomes are identified, and appropriate referrals are made, if necessary.
• All forms of harassment are avoided throughout the assessment process and in the review and reporting of assessment outcomes.
• The rights of candidates are protected during and after the assessment process.
• Candidates are made aware of their rights and processes of appeal.
• Personal or interpersonal factors that are irrelevant to the assessment of competence must not influence the assessment outcomes.
• Evidence is verified against the rules of evidence.
• Assessment decisions are based on available evidence that can be produced and verified by another assessor.
• Assessments are conducted within the boundaries of the assessment system policies and procedures.
• Formal agreement is obtained from candidates and the assessor that the assessment was carried out in accordance with agreed procedures.
• Assessment systems and tools are consistent with equal opportunity legislation.
• Candidates are informed of all assessment reporting processes prior to the assessment.
• Candidates are informed of all known potential consequences of assessment decisions, prior to the assessment.
• Confidentiality is maintained regarding assessment decisions/outcomes and records of individual assessment outcomes which identify personal details are only released with the written permission of the candidate/s.
• Assessment outcomes are used consistently with the purposes explained to candidates.
• Self-assessments are periodically conducted to ensure current competence against the Training and Assessment Training Package (TAA04) competency standards.
• Professional development opportunities are identified and sought.
• Opportunities for networking amongst assessors are created and maintained.
• Opportunities are created for technical assistance in planning, conducting and reviewing assessment practice and participating in validation.

Advice to TAA Assessors on Conducting Assessments

This section provides guidance to TAA assessors on conducting assessments. It includes:
• initial advice to TAA candidates on assessment requirements
• access to a practice environment for TAA candidates
• advice on using simulation
• advice on applying reasonable adjustment
• advice on online assessment
• advice on integrated assessments
• interpreting the Training and Assessment Training Package (TAA04) units for assessment purposes
• developing TAA assessment strategies
• contextualising Training and Assessment Training Package (TAA04) units for assessment
• developing or modifying assessment tools.

Initial advice to TAA candidates on assessment requirements

The TAA assessor is responsible for ensuring the integrity of the assessment process of the Training and Assessment Training Package (TAA04) units. Part of this responsibility involves the provision of initial advice to TAA candidates to ensure they are fully aware of the assessment requirements of the Training and Assessment Training Package (TAA04) units including the underlying language, literacy and numeracy (LL&N) and other skill requirements embedded within these units. This advice ensures TAA candidates can make an informed decision about proceeding with training and/or assessment in Training and Assessment Training Package (TAA04) units or qualifications.

This initial advice should also address the relationship between the Training and Assessment Training Package (TAA04) and the candidate’s own area of vocational competence.
The link between vocational competence and Training and Assessment Training Package (TAA04) competence

A central focus of the Training and Assessment Training Package (TAA04), particularly the TAA40104 Certificate IV in Training and Assessment, is the connection with the candidate’s area of vocational competence.

TAA candidates generally undertake this Training Package because they possess vocational competence in a specific industry/subject/technical area and they need to develop or extend competence in training and assessment to teach/train/facilitate the learning of other individuals in their area of vocational expertise. In some instances the TAA candidate may be acquiring vocational competence concurrently with their Training and Assessment Training Package (TAA04) competencies.

The development and assessment of the candidates’ competence in Training and Assessment Training Package (TAA04) units, particularly in the learning design, delivery and assessment fields, should be focused around their vocational competence. This will provide a relevant and meaningful reference point for assessment.

Potential TAA candidates should be made aware of the importance of vocational competence and advised of the AQTF requirements for vocational competence if they intend to use their Training and Assessment Training Package (TAA04) qualifications to deliver training in an RTO.

English language, literacy and other skill requirements

It is part of an RTO’s responsibility to provide appropriate information to candidates to ensure they understand the requirements of the units of competency prior to assessment. TAA assessors carrying out this responsibility must ensure TAA candidates/potential candidates are advised effectively of the underlying skill requirements of Training and Assessment Training Package (TAA04) units.

In particular, advice about the underlying level of English language and literacy required to meet the outcomes of Training and Assessment Training Package (TAA04) units must be made clear prior to commencement of the learning and/or assessment process, and candidates who may have difficulty meeting these requirements must be provided with advice and options such as appropriate language and literacy skills training.

Candidates must also be advised that competence will include assessment of the specified language and literacy Performance Criteria and required skills of individual Training and Assessment Training Package (TAA04) units. This includes effective language, communications and interpersonal skills and the ability to write a range of documentation. For example, TAA candidates are expected to read and interpret Training Packages, develop and document learning programs and assessment tools, present information, facilitate in a number of contexts using a range of skills, and prepare various records and documents.

Technology applications are also required as part of the competency specifications of some units. Further, complex cognitive skills in planning, research, interpretation, analysis and synthesis form part of the skills requirements of many units.

In a learning and assessment pathway, some of these skills can be developed through the learning process – however, this will depend on the approach adopted in the learning strategy and learning program content and the level of resourcing available.

In some situations, implementation may be based on an assumption that learners/candidates possess these skills. In these circumstances, and in an assessment only pathway, TAA candidates must be made aware of the specific skills that underpin the outcomes and performance requirements of the Training and Assessment Training Package (TAA04) units.
to ensure they are capable of demonstrating competence. Where essential skills need to be acquired, options for meeting these skills gaps must be provided.

Access to a practice environment

The units in the Training and Assessment Training Package (TAA04) are designed to be practised and assessed in the workplace. Workplace application is desirable to ensure that competence to the standard required by this industry sector has been attained.

Ideally, all TAA candidates should be working in or have access to an operating training and assessment environment such as an RTO, a training division in an enterprise, government or community organisation, or training services applied in a voluntary agency.

For candidates in a learning and assessment pathway, a work environment provides opportunities for practice, for applying skills and knowledge and for undertaking relevant work activities that address the performance requirements of the Training and Assessment Training Package (TAA04) units.

It is recognised that TAA candidates in a learning and assessment pathway will not always have access to an effective practice environment. TAA assessors need to consider options within their own workplaces to support practice opportunities, such as whether their own RTO can provide opportunities for workplace application. Candidates without a suitable workplace should also be encouraged to find other practice environments.

For candidates in an assessment only pathway, a work environment in training and/or assessment is essential in providing the basis for the collection of evidence that meets the rules of evidence.

Advice on using simulation

While a workplace environment is highly desirable for both practice and assessment, it is recognised that, where an appropriate workplace environment is not available, simulation may be required as an assessment environment for some units or aspects of competence. Some examples would be where occupational health and safety considerations make workplace application inadvisable or the TAA candidate does not have and cannot gain access to a workplace where all the assessment requirements of a unit can be met.

Simulation is not, and should not be considered an assessment ‘short cut’ as the rules of evidence still apply.

Where simulation is used, the TAA assessor must ensure that the assessment replicates the workplace activities and range of contexts addressed by the unit. It is critical that the designer of the simulation has a thorough knowledge of the unit content and is experienced in the current circumstances of the work outcomes the unit defines to ensure validity and authenticity.

In deciding whether a simulation has been adequately designed, the following questions should be asked.

Are there opportunities to:

• demonstrate the dimensions of competency?
• address and demonstrate the range of skills identified within the units, including both technical and generic skills?
• effectively transfer required knowledge to practical applications?
• incorporate the requirements for collaboration with colleagues?
• meet the specific assessment requirements of the units?
• reflect the complexity of work requirements such as time pressures, competing and multiple work pressures, prioritisation, and deadlines?
• demonstrate inclusive practices and capacity to meet the needs of diverse groups and specific individuals?
• find, discuss and test solutions to problems?
• explore health and safety issues?
• demonstrate the range and level of language and literacy within the units?

**Advice on applying reasonable adjustments**

In assessing the competence of individuals, TAA assessors must provide for reasonable adjustments to ensure the assessment principles of fairness and flexibility are addressed.

However, TAA assessors must be confident that reasonable adjustments do not compromise the outcomes of the unit and the integrity of the qualifications and Statements of Attainment issued as certification of achievement.

Achievement of the units and qualifications of the Training and Assessment Training Package (TAA04) leads to national, portable recognition of competence. As such, individuals assessed as competent must be able to demonstrate transfer of competence to environments other than their own. Specific care should be undertaken to ensure the literacy and language and other skill requirements are addressed in the assessment process and that candidate/s are fully informed of assessment requirements prior to commencement of any learning program and/or assessment process. Candidates with difficulties in meeting these requirements must be provided with options and advice.

Where a TAA candidate requires reasonable adjustments, TAA assessors must decide what types of adjustments are needed and then make a judgement about whether these are ‘reasonable’ given the unit content requirements and specifications. The test of reasonableness is subjective but must be guided by the principles of assessment and the balance between them, as well as the rules of evidence.

Reasonable adjustments may take the form of additional support during the assessment process for example in the provision of particular equipment or software, or changes to the physical environment, or provision of support persons for physical disability or additional time. An individual’s access to the assessment process should not be adversely affected by restrictions placed on the location or context of assessment beyond the requirements specified in this Training Package.

The use of interpreters would not be a reasonable adjustment for assessment of units in this Training Package as English language is essential. Similarly, a focus on oral responses in place of documentary evidence would not be reasonable if the unit clearly requires evidence of literacy skills to write, document and record material. Given the focus on cognitive skills relating to planning, research, analysis, thinking techniques and evaluation, achieving the competency outcomes may be difficult for people with some learning disabilities or intellectual disabilities.

Where reasonable adjustments have been applied, assessors should ensure the type of adjustments is recorded to guide any further assessments of the candidate and for validation purposes.

**Advice on online assessment**

TAA assessors working in an e-environment must ensure the assessment activities and overall assessment process clearly meets the assessment requirements of the units and the rules of evidence. The focus and content of most Training and Assessment Training Package (TAA04) units involves multiple and complex relationships and interactions between people and, in the context of the units in the delivery and facilitation and assessment fields of the Training Package, interactions involving other learners and candidates. The people skills required by
the Training and Assessment Training Package (TAA04) units must be demonstrated in the assessment process.

Assessment undertaken entirely through an e-based platform will not provide the necessary evidence of the demonstration of these skills. Additional assessment evidence involving real-life experiences will be needed.

**Advice on integrated assessments**

Whilst TAA candidates may be assessed against each individual unit of competency in the Training and Assessment Training Package (TAA04), the Training and Assessment Training Package (TAA04) offers significant capacity to develop assessment tools and an assessment process that integrates evidence collection across two or more Training and Assessment Training Package (TAA04) units.

This approach will be particularly relevant where candidates may be undertaking, or seeking recognition for, a number of units of competency that link together in content and/or focus. This may occur where:

- the outcomes and performance requirements of a unit can be linked to another unit as an integrated and continuous work activity, e.g. *TAAASS401A Plan and organise assessment* may be linked to *TAAASS403A Develop assessment tools* and then to *TAAASS402A Assess competence*

- one unit forms the developmental basis for another, e.g. *TAADES401A Use Training Packages to meet client needs* underpins the competence of *TAAASS403A Develop assessment tools* as well as many other units in the Training and Assessment Training Package (TAA04)

- knowledge and skills overlap and are reflected across a number of units and these can be pulled together in an assessment tool.

TAA assessors are provided with guidance on units that may be appropriate for integrated assessment in the last section of the Evidence Guide for each unit. TAA assessors are advised to consider these suggestions but may also choose other combinations.

TAA assessors should note that the units listed below can form the basis of integrated assessment with almost any other Training and Assessment Training Package (TAA04) unit or units. Because they can be individually and/or collectively linked to most other Training and Assessment Training Package (TAA04) units, for learning and assessment purposes, they have not been specifically identified in the integrated assessment section of individual unit Evidence Guides.

- *TAAENV401A Work effectively in vocational education and training*
- *TAAENV402A Foster and promote an inclusive learning culture*
- *TAAENV403A Ensure a healthy and safe learning environment*
- *TAADES401A Use Training Packages to meet client needs.*

As an example, *TAADES401A Use Training Packages to meet client needs*, focuses on the knowledge and skills needed to unpack and interpret a Training Package. This process will involve defining the client need, sourcing a Training Package to meet this need, analysing and interpreting the endorsed components against the client need and then developing the specific application. The application may be to develop a skills program, obtain a qualification or assess the competence of a group of employees. These applications are all addressed as separate units of competency. If for example it is to assess a group of individuals, the learning and assessment required to achieve *TAADES401A* could be fully integrated or embedded into the learning and assessment process for achieving competence in *TAAASS402A.*
In conducting integrated assessments, TAA assessors must ensure they use assessment tools that have been developed specifically to support an integrated assessment process and that these tools clearly address the rules of evidence.

**Interpreting the specifications of Training and Assessment Training Package (TAA04) units**

TAA assessors must reference their assessments to the specifications of the Training and Assessment Training Package (TAA04) units of competency and must ensure that TAA candidates have access to and use the Training and Assessment Training Package (TAA04) units as part of their learning and/or assessment to achieve these units.

Assessment information is located throughout each unit of competency and assessors need to ensure that in developing, modifying and/or using existing assessment tools the assessment requirements are addressed.

Detailed information on the format and structure of the Training and Assessment Training Package (TAA04) competency standards is provided in the Introduction to the Competency Standards section of this Training Package. Assessors are advised to read this information carefully. Specific points relating to assessment are considered below.

The **Application** statement provides useful information to guide the assessor in clarifying the focus and content of the unit and relationships with other units and may provide options for sequential and/or co-assessment.

The **Elements** and **Performance Criteria** define the vocational outcomes and the measurement of demonstrated performance. This is the core of the assessment process. However in interpreting these requirements it is essential that the assessor interprets the whole work activity, function or process represented by the unit rather than a step by step checklist approach to each Performance Criteria.

Elements may be sequential to each other, concurrent, independent of each other or a mix, depending on the unit focus. Demonstrated performance of the whole unit may involve meeting the assessment requirements of one Element before progressing to the next; in other units, demonstrated performance will be simultaneous; or separately assessed.

For example in **TAADEL402A Facilitate group-based learning**, Element 1 is Establish an environment conducive to group learning. Logically, this element must be demonstrated before Element 2: Deliver and facilitate training sessions. However, Element 2 and Element 3: Demonstrate effective facilitation skills and Element 4: Support and monitor learning, can all be demonstrated at the same time and the assessment process should address this concurrence. In **TAADEL401A Plan and organise group-based delivery**, Element 1: Interpret the learning environment and delivery requirements and Element 2: Prepare session plans are discrete and the assessment tools would reflect the requirements of each element separately.

TAA assessors need to look closely at the **Range Statement** to reference their assessments to both the candidate’s immediate context and to the broader context of the Training and Assessment Training Package (TAA04)’s application.

TAA assessors should ensure that the breadth and depth suggested by the Range Statement is encompassed in the assessment process to ensure transferability of the candidate’s competence to other contexts. This may require case studies, projects and simulations. TAA assessors will need to use judgement in determining what aspects of the Range Statement need to be addressed.

In some units, the Range Statement will identify an aspect of performance which must be addressed in full. These are identified with the stem ‘must include’ after the specific term, word or phrase which has been listed. In these units, TAA assessors must ensure each bullet point for the nominated aspect is addressed as part of the assessment.
TAA assessors will also find there is replication between some Range Statement content and the defined knowledge and skills sections of the Evidence Guide. This has been done deliberately to ensure interpretation of the Performance Criteria is clear and robust.

The Evidence Guide provides TAA assessors with a range of information relevant to assessment including generic and specific assessment requirements. TAA assessors are advised to read the assessment overview, refer to the quality evidence requirements and ensure the specific evidence requirements are addressed. Detailed specification of knowledge and skills intrinsic to competent performance must also be evident in the assessment methods and tools used.

Assessment methods are not identified. This is a matter of interpretation and judgement by the competent professionals using this Training Package.

The qualification level at which the unit has been packaged should also be considered to determine if the breadth and depth of knowledge and skills required have been addressed in the development of relevant assessment activities.

**Developing Training and Assessment Training Package (TAA04) assessment strategies**

Assessment strategies form part of the AQTF requirements for assessment. TAA assessors must ensure assessment is conducted in accordance with a clearly defined assessment strategy which has been developed as part of a Learning and Assessment Pathway or Assessment Only pathway. A key reference for developing an assessment strategy in a Learning and Assessment pathway is the unit of competency, TAADES501A. TAAASS501A also addresses this skill in an Assessment Only pathway.

The assessment strategy can include:

- identification and interpretation of the benchmarks to be used for assessment
- arrangements for RCC/RPL, as part of an assessment only or combination pathway, including guidance and assistance to candidates about self-assessment and collection of evidence
- determination of assessment methods
- determination of assessment tool requirements
- organisational arrangements for assessment including physical and human resources, roles and responsibilities, and partnership arrangements, where relevant
- development of an assessment plan relating to the specific assessment context and including strategies for reasonable adjustment, OHS and ensuring a quality assessment process
- nominated quality assurance mechanisms, including validation
- identified risk management strategies.

**Contextualising Training and Assessment Training Package (TAA04) units for assessment**

Any Training and Assessment Training Package (TAA04) units which are contextualised in an assessment must reflect the guidelines for contextualisation set out in the Introduction to the Competency Standards section of this Training Package. TAA assessors must refer to these guidelines before undertaking any contextualisation.

**Developing or modifying assessment tools**

When developing assessment tools, TAA assessors must ensure that the tools:

- are benchmarked against the relevant unit or units of competency
- are reviewed as part of the validation of assessment strategies as required by the AQTF Standards for Registered Training Organisations, and
• meet the assessment requirements expressed in the AQTF Standards for Registered Training Organisations.

A key reference for assessors in developing assessment tools is the unit of competency TAAASS403A Develop assessment tools. TAA assessors must have this unit or demonstrate equivalent competency in this unit.

When using off-the-shelf assessment resources that contain assessment tools, TAA assessors must review these products to ensure that the materials effectively meet the relevant Training and Assessment Training Package (TAA04) competency standards. These tools may need to be modified or contextualised to reflect the operating environment and individual needs of the TAA candidate and/or to ensure the Performance Criteria and Evidence Requirements of the competency standards have been met.
Scope of Operation of Training and Assessment Training Package (TAA04) Assessment Guidelines

Assessment of Training and Assessment Training Package (TAA04) units undertaken in another industry context (for example, where the Training and Assessment Training Package (TAA04) units have been imported into another Training Package) must comply with the Training and Assessment Training Package (TAA04) Assessment Guidelines, including the vocational competence requirements for TAA trainers and/or assessors defined earlier.

Responsibility for Assessment Guidelines

The ongoing monitoring and review of these Assessment Guidelines will be incorporated in the general review and maintenance of this Training Package. Any review will ensure that these Assessment Guidelines:

- continue to meet the requirements of the vocational education and training sector
- are consistent with the AQTF Standards for Registered Training Organisations
- promote confidence in the system
- ensure assessment processes and outcomes are valid, reliable, fair and flexible
- support RTOs to effectively carry out their responsibilities.

Further sources of information

For advice and purchase of Training and Assessment Training Package (TAA04) and related materials contact:

Innovation and Business Industry Skills Council trading as Innovation & Business Skills Australia
Building B, Level 2
192 Burwood Road
Hawthorn, Victoria, 3122

Tel (03) 9815 7000
Fax (03) 9815 7001

www.ibsa.org.au

This Training Package can also be purchased through:

Australian Training Products Ltd
Level 25, 150 Lonsdale Street
MELBOURNE VIC 3000
PO Box 5347BB
MELBOURNE VIC 3001
Telephone: (03) 9655 0600
Fax: (03) 9639 4684
Web: www.atpl.net.au
Email: sales@atpl.net.au

For advice on the AQTF requirements and registration processes for the Training and Assessment Training Package (TAA04) contact your State or Territory Training Authority.

For networking and support contact and become involved in a trainer/assessor network, community of practice. Contact details will be maintained on the ISC website.
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<th><strong>General resources</strong></th>
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<tr>
<td>Australian Quality Training Framework Standards for Registered Training Organisations</td>
<td>Australian National Training Authority, Melbourne, 2001</td>
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<td>Download it from <a href="http://www.aqf.edu.au/implem.htm">www.aqf.edu.au/implem.htm</a></td>
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<td>Available in hard copy from ANTA or download it from <a href="http://www.anta.gov.au">www.anta.gov.au</a></td>
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<tr>
<td>Style Manual for Training Package Endorsed Components</td>
<td>Australian National Training Authority, Melbourne, 2003</td>
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<tr>
<td>Training Package Development Handbook</td>
<td>Australian National Training Authority, Melbourne, Feb 2004, version 1</td>
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TAA04 Training and Assessment
Training Package

Introduction to the Competency Standards
What is Competency?

The broad concept of industry competency concerns the ability to perform particular tasks and duties to the standard of performance expected in the workplace. Competency requires the application of specified skills, knowledge and attributes relevant to effective participation in an industry, industry sector or enterprise.

Competency covers all aspects of workplace performance and involves performing individual tasks; managing a range of different tasks; responding to contingencies or breakdowns; and, dealing with the responsibilities of the workplace, including working with others. Workplace competency requires the ability to apply relevant skills, knowledge and attributes consistently over time and in the required workplace situations and environments. In line with this concept of competency Training Packages focus on what is expected of a competent individual in the workplace as an outcome of learning, rather than focusing on the learning process itself.

Competency standards in Training Packages are determined by industry to meet identified industry skill needs and are based on extensive research, validation and evaluation. Each competency standard or unit of competency reflects a discrete job function, area of work or occupational outcome. The standard is set by defining the work outcomes (referred to as elements of competency) to be met in demonstrating competency which are measured against defined performance specifications (Performance Criteria). Demonstration of the Performance Criteria is guided and supported by information and advice set out in the Evidence Guide of each unit.

Competency standards are written to a common structure and format to support consistency and usability. This structure and format is determined by the Australian National Authority and amended from time to time to support continuous improvement. Some parts of this format are mandatory for all units while other parts are included at the discretion of the Training Package developer. Detailed information on the structure and format applied to the Training and Assessment Training Package (TAA04) units is set out later in this Introduction.

Generally, each unit of competency within a Training Package is linked to one or more AQF qualifications. Refer to the Qualifications section for information on the packaging of Training and Assessment Training Package (TAA04) units into AQF qualifications.

Units can be unaligned in special circumstances where it is clearly justifiable. The Training and Assessment Training Package (TAA04) contains one unit in this category. This unit is TAAASS301A Contribute to assessment. (This unit is discussed later in this section).

Overview of the Training and Assessment Training Package (TAA04) Competency Standards

Purposes of Training and Assessment Training Package (TAA04) Competency standards

The Training and Assessment Training Package (TAA04) competency standards can be used for a range of different purposes. Determining the purpose will impact on how the standards are used.

A key purpose of the Training and Assessment Training Package (TAA04) competency standards is to establish nationally recognised benchmarks that define vocational competence in training and assessment and related work in vocational education. These benchmarks are used to guide teaching and learning in this area of vocational competence and to determine assessment requirements.

In addressing this purpose, the Training and Assessment Training Package (TAA04) competency standards are designed to support learners from a wide range of backgrounds and characteristics including those entering this field of work for the first time and those currently...
employed as trainers/facilitators/ VET practitioners/assessors and who may have considerable experience and/or other forms of certification.

In the latter context, individual Training and Assessment Training Package (TAA04) units of competency will be particularly useful as a focus for professional and staff development which could in turn be recognised either as a standalone point of recognition through a Statement of Attainment and/or in contribute to a Training and Assessment Training Package (TAA04) qualification.

Other purposes may include use as a tool for Human Resources (HR), Industrial Relations (IR) or employment. Such purposes are entirely determined by individual organisations and their organisational needs.

A further purpose is simply as a reference tool for existing trainers and/or assessors and others working in this field who may want to self-manage their own ongoing learning and/or to reflect on their current practice.

**Competency Fields and units of Competency**

The competency standards in the Training and Assessment Training Package (TAA04) are grouped into eight fields of competency. The eight fields are:

- Field 1 Learning Environment
- Field 2 Learning Design
- Field 3 Delivery and Facilitation
- Field 4 Assessment
- Field 4 Training Advisory Services
- Field 6 Coordination, Management and Quality of Training and/or Assessment Services
- Field 7 Language, Literacy and Numeracy Practice
- Field 8 Imported Units

The Fields are represented in the following diagram.

The central focus of this competency framework is on learning and the learner, with the fields of competency that most directly support the learning process directly grouped around this central focus. Competency Fields representing relevant and connected areas of work are grouped around this core and overlaying the whole is the Learning Environment Field.
Training and Assessment Training Package (TAA04) Competency Fields

**Field 1: Learning Environment (ENV)**

The learning environment field units address different aspects of the relationships between work and the environment of vocational education and training.

The three units – TAAENV401A Work effectively in vocational education and training, TAAEN402A Foster and promote an inclusive learning culture, and TAAENV403A Ensure a healthy and safe learning environment – support the other units of competency in the Training Package. The outcomes of these units establish the parameters of work in training and/or assessment.

The other units in this field focus on innovation, self-development and leadership.

**Field 2: Learning Design (DES)**

The learning design field units address competence in both the design of learning products and the design of the learning process.

The first unit in this field – TAADES401A Use Training Packages to meet client needs – provides the base or foundation for the Training and Assessment Training Package (TAA04) and addresses the skills and knowledge needed to unpack and use Training Packages for different purposes and client needs. These different purposes and applications are then further elaborated within separate competency standards, for example, a Training Package may be used to Design and develop a learning strategy (TAADES501A) or to Facilitate group-based learning (TAADEL402A) or to Assess competence (TAAASS402A).

Two units – TAADES501A Design and develop learning strategies and TAADES402A: Design and develop learning programs – address different applications and outcomes of the learning design process. Other units address the design and development of learning resources and competency standards.
Field 3: Delivery and Facilitation (DEL)
The assessment field units address the competence required to deliver training and to facilitate learning. The units differentiate competence by application in different delivery modes (face-to-face, e-based, through work and by distance) and by application of particular delivery methods and techniques (action learning, individual facilitation and instruction and demonstration). The delineation by mode and method recognises that the outcomes, skills, knowledge and attributes involved represent both different applications and new areas of skills and knowledge that form distinct competency requirements.

Field 4: Assessment (ASS)
The units in this Field address the process of assessment, the development of assessment tools, competency in validation processes and leadership, and coordination of assessment systems and services.

The process of planning, conducting and reviewing assessment of candidates is encompassed in a single unit of competency – TAAASS402A Assess competence – while the planning and organising that precedes the assessment process is a separate unit, as is validation.

Field 5: Training Advisory Services (TAS)
The training advisory services field units represent two discrete areas of work. The first relates to training support while the other group of units represent advisory/consultancy work functions.

Field 6: Coordination, Management and Quality of Training and/or assessment Services (CMQ)
This coordination, management and quality field units addresses a range of work functions connected with the coordination and management of training and/or assessment services and systems. Key areas addressed by these units include policy development, apprenticeship/traineeship coordination, systemic evaluations, determining scope and team leadership.

Field 7: Specialist Language, Literacy and Numeracy Practice (LLN)
The language, literacy and numeracy field units provide a clearly defined set of standards for this area of specialist practice and will enable a pathway into this field of work from a range of training contexts.

Only one unit is included at this stage – TAALLN401A Address language, literacy and numeracy issues within learning and assessment practice.

Field 8: Imported Units
The imported units have been selected from other Training Packages, principally the Business Services Training Package, to complement the Training and Assessment Training Package (TAA04) competency standards and to provide additional flexibility to the Training and Assessment Training Package (TAA04) competency framework and qualifications. The imported units represent areas of generic competence that underpin and support specific Training and Assessment Training Package (TAA04) competence. It is suggested that users consider appropriate contextualisation of the imported units for application in the vocational education and training environment. Users should note that under the packaging rules of the Training and Assessment Training Package (TAA04) qualifications, other units could be selected in place of the nominated imported units.
List of Training and Assessment Training Package (TAA04) units and their codes

**Field 1: Learning Environment**
- TAAENV401A Work effectively in vocational education and training
- TAAENV402A Foster and promote an inclusive learning culture
- TAAENV403A Ensure a healthy and safe learning environment
- TAAENV404A Develop innovative ideas at work
- TAAENV501A Maintain and enhance professional practice

**Field 2: Learning Design**
- TAADES401A Use Training Packages to meet client needs
- TAADES402A Design and develop learning programs
- TAADES501A Design and develop learning strategies
- TAADES502A Design and develop learning resources
- TAADES503A Research and design e-learning resources
- TAADES504A Develop and evaluate e-learning resources
- TAADES505A Research and develop competency standards

**Field 3: Delivery and Facilitation**
- TAADEL301A Provide training through instruction and demonstration of work skills
- TAADEL401A Plan and organise group-based delivery
- TAADEL402A Facilitate group-based learning
- TAADEL403A Facilitate individual learning
- TAADEL404A Facilitate work-based learning
- TAADEL405A Coordinate and facilitate distance-based learning
- TAADEL501A Facilitate e-learning
- TAADEL502A Facilitate action learning projects
- TAADEL503A Provide advanced facilitation to support learning
- TAADEL504A Lead and coordinate training services

**Field 4: Assessment**
- TAAASS301A Contribute to assessment
- TAAASS401A Plan and organise assessment
- TAAASS402A Assess competence
- TAAASS403A Develop assessment tools
- TAAASS404A Participate in assessment validation
- TAAASS501A Lead and coordinate assessment systems and services

**Field 5: Training Advisory Services**
- TAATAS401A Maintain information requirements of training and/or assessment organisations
- TAATAS501A Undertake organisational training needs analysis
- TAATAS502A Prepare a tender bid
TAATAS503A  Manage contracted work
TAATAS504A  Facilitate group processes

Field 6: Coordination, Management and Quality of Training and/or Assessment Services
TAACMQ501A  Develop training and/or assessment organisational policies and procedures
TAACMQ502A  Coordinate training and/or assessment arrangements for apprenticeships/traineeships
TAACMQ503A  Lead and conduct training and/or assessment evaluations
TAACMQ504A  Determine and manage scope of training and/or assessment services
TAACMQ505A  Lead a team to foster innovation

Field 7: Language, Literacy and Numeracy Practice
TAALLN401A  Address language, literacy and numeracy issues within learning and assessment practice

Field 8: Imported Units
Units packaged in the TAA40104 Certificate IV in Training and Assessment
BSBAUD402A  Participate in a quality audit
BSBCMN404A  Develop teams and individuals
BSBCMN405A  Analyse and present research information
BSBCMN409A  Promote products and services
BSBMKG406A  Build client relationships

Units packaged in the TAA50104 Diploma of Training and Assessment
BSBEBUS508A  Build a virtual community
BSBFLM512A  Ensure team effectiveness
BSBFLM514A  Manage people
BSBHR504A  Manage industrial relations policies and processes
BSBMGT503A  Prepare budgets and financial plans
BSBMGT504A  Manage budgets and financial plans
BSBMGT506A  Recruit, select and induct staff
BSBMKG501A  Evaluate marketing opportunities
BSBRKG502A  Manage and monitor business or records systems
CHCCAR501A  Provide careers guidance
PSPGOV504B  Undertake research and analysis
Integral aspects of competence

The Training and Assessment Training Package (TAA04) units are designed to reflect the breadth and depth of knowledge and skill required for competent performance in the areas of work addressed within the Training Package. The units emphasise skills such as language/communications and interpersonal skills, literacy, research and analysis, and generic skills represented through the Key Competencies. Areas of knowledge reflect requirements such as the operating context of vocational education and training, knowledge of learning theories and principles, and OHS responsibilities.

Particular aspects of competence or themes that are embedded across a range of the Training and Assessment Training Package (TAA04) units include:

- supporting effective learning
- developing facilitation skills
- creating an effective learning environment
- fostering inclusivity
- managing cultural diversity
- encouraging collaborative processes
- fostering innovation
- meeting ethical and legal requirements
- outlining OHS roles and responsibilities
- managing own ongoing learning and professional development and currency
- achieving transferability across contexts, and
- maintaining continuous improvement.
Training and Assessment Training Package (TAA04) Unit Structure and Format

Overview of unit components

The Training and Assessment Training Package (TAA04) units of competency have been designed to provide users with competency standards that provide clarity, depth, breadth and specificity.

The units reflect the dimensions of competence – task skills, task management skills, contingency management skills and job role/environment skills.

Table 5 summarises the unit template and the role of each component part in the unit design. Advice regarding each component used in this template follows:

**Unit Title**
The Unit Title is a succinct statement of the outcome of the unit of competency. Each unit of competency title is unique, both within and across Training Packages.

**Unit Descriptor**
The Unit Descriptor broadly communicates the content of the unit of competency and the work outcome it addresses.

**Application Statement**
This component provides the user with a more detailed overview of the unit focus and content, and sets out the parameters of the unit, its potential audience and relationship to other units in the Training Package. This part of the unit structure is particularly useful as a brief explanation of the unit’s scope for both teaching/learning and assessment purposes.

**Elements**
The Elements describe the critical or significant outcomes which must be met to achieve competency.

**Performance Criteria**
Performance Criteria specify the performance requirements that are used to evaluate achievement of the elements of competency. The Performance Criteria may address specific tasks, roles, skills and applied knowledge that demonstrate competent performance.

In defining the Performance Criteria every attempt has been made to ensure clarity of meaning by italicising any word or term which could have multiple meanings or applications. This italicised word or term is then elaborated/clarified in the Range Statement.

**Range Statement**
This component provides the user with relevant information that aids both understanding and gives meaning to the unit in different contexts. The Range Statement in the Training and Assessment Training Package (TAA04) units has been broadened and extended to provide more information to guide TAA facilitators and/or assessors in interpreting the Performance Criteria.

Where the Range Statement provides guidance relating to contextual information which may vary considerably in different training and/or assessment environments, the qualification level at which the unit has been packaged should be considered in interpreting this range to ensure the breadth and depth at this level is addressed in learning and assessment activities.

**Evidence Guide**
The Evidence Guide is critical in assessment as it provides information to the assessor about how the defined competency is demonstrated. The Evidence Guide does this by providing a
range of evidence for the assessor to make determinations, and by providing the assessment context. The Evidence Guide sets out:

- conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- relationships with the assessment of any other units of competency
- suitable methodologies for conducting assessment including the potential for workplace simulation
- resource implications, for example access to particular equipment, infrastructure or situations
- how consistency in performance can be assessed over time, various contexts and with a range of evidence, and
- the required knowledge, skills and attributes to demonstrate competence

In the Training and Assessment Training Package (TAA04) the Evidence Guide has been designed to provide increased depth and definition of the evidence requirements for competent performance.

This detailed guidance is also very useful in supporting the learning process in a learning and assessment pathway.

The qualification level at which the unit has been packaged should also be considered when interpreting the Evidence Guide to determine if the breadth and depth of knowledge and skills required have been addressed in the development of relevant learning and assessment activities.

The Evidence Guide of the Training and Assessment Training Package (TAA04) units includes ten sub-components. These are:

a) **Overview of assessment requirements**

   The Evidence Guide of each unit begins with an overview that sets out the broad requirements for assessment of the unit. TAA assessors should read this section to ensure they have an overall understanding of the assessment requirements.

b) **Required knowledge**

   In the Training and Assessment Training Package (TAA04) units, knowledge is defined as *required knowledge* because it represents areas of knowledge that TAA candidates must demonstrate in order to meet the performance specifications.

   This required knowledge is specified into content areas, each of which are further defined into specific aspects. These aspects must be addressed as part of the learning and/or assessment process. They provide definition to guide TAA trainers/facilitators and/or assessors in developing tools and activities to address the knowledge needed for competence.

   The listed aspects are not meant to imply an exhaustive definition of the knowledge area. The stem used indicates this – *Required knowledge includes but is not limited to…* TAA Trainers/facilitators can enhance and further develop aspects of any knowledge area as part of their professional practice.

c) **Required skills and attributes**

   The same model has been used for defining the specific skills and relevant attributes that TAA candidates must demonstrate in order to meet the performance specifications. This section includes a list of critical skills and attributes and provides further elaboration of the content to be addressed.
**d) Key Competencies or generic skills**

All Training Packages require the integration of Key Competencies either in each unit of competency, or across a qualification, depending on industry needs and preferences.

The Key Competencies were first defined in 1992 in the project report, *Putting General Education to Work: the Key Competencies Report* (Mayer Committee 1992). The skills and knowledge they describe are essential for effective workplace participation and involve the sorts of capabilities commonly used by employers as selection criteria. They underpin the ability of employees to adapt to technological, organisational, societal and functional change.

The Key Competencies are generic, in that they apply to work in general, rather than to particular occupations or industries. They focus on the application of knowledge and skills in an integrated way in workplace situations. The seven Key Competencies are:

1. **Collecting, analysing and organising information**
   The capacity to locate, sift and sort information in order to select what is required and to present it in a useful way, and evaluate both the information itself and the sources and methods used to collect it.

2. **Communicating ideas and information**
   The capacity to communicate effectively with others using the range of spoken, written, graphic and other non-verbal means of expression.

3. **Planning and organising activities**
   The capacity to plan and organise one’s own work activities, including making good use of time and resources, sorting out priorities and monitoring one’s performance.

4. **Working with others in teams**
   The capacity to interact effectively with other people both on a one-to-one basis and in groups, including understanding and responding to the needs of a client and working effectively as a member of a team to achieve a shared goal.

5. **Solving problems**
   The capacity to apply problem-solving strategies in purposeful ways, both in situations where the problem and the solution are clearly evident and in situations requiring creative thinking and a creative approach to achieve a desired outcome.

6. **Using mathematical ideas and techniques**
   The capacity to use mathematical ideas, such as number and space, and techniques such as estimation and approximation, for practical purposes.

7. **Using technology**
   The capacity to apply technology, combining the physical and sensory skills needed to operate equipment with the understanding of scientific and technological principles needed to explore and adapt systems.

**Performance Levels of Key Competencies**

There are three levels of performance defined within the Key Competencies. These are stand-alone levels and do not correspond to the AQF qualification levels.

- **Performance Level 1** is concerned with the level of competence needed to undertake activities efficiently with sufficient self-management to meet the explicit requirements of the activity, and to make judgements about the quality of outcomes against established criteria.
• **Performance Level 2** describes the competence needed to *manage* activities requiring the selection, application and integration of a number of elements, and to select from established criteria to judge quality of process and outcome.

• **Performance Level 3** describes the competence needed to *evaluate and reshape* processes, to establish and use principles in order to determine appropriate ways of approaching activities, and to establish criteria for judging quality of process and outcome.

The Mayer Key Competencies forms part of the overall knowledge/skills requirements within each Training and Assessment Training Package (TAA04) unit. Each of the seven Key Competencies is listed with examples of how achievement of these generic skills is demonstrated. In evaluating the level of performance for the Key Competencies, TAA trainers/facilitators and/or assessors should consider the performance expectations of the AQF qualification level at which the unit is packaged.

**Delivery and assessment of Key Competencies**

The Key Competencies are integral to workplace competency and must be explicitly considered in the design of the learning process, in delivery and in assessment of candidates against the Training and Assessment Training Package (TAA04) units of competency, as represented in the following diagram.

Integration of Key Competencies

e) and f) **Products and processes that could be used as evidence**

Products and processes are sub-components of the Evidence Guide which provide advice to TAA assessors and candidates on outputs – products, materials, service delivered or performance observed and inputs – demonstrating how the outputs were achieved – that can used as evidence. These sections also provide advice to TAA assessors on areas of questioning to establish whether key knowledge and skills have been acquired including the ‘what’, ‘how’ and ‘why’ aspects of competence.
g) Resource implications

This sub-component sets out information on the resources required for assessment.

h) Quality evidence requirements: generic assessment requirements

This part of the Evidence Guide provides the generic requirements for collecting evidence and determining competence. It has been included in each unit because the units can be used in a stand-alone capacity and as imported units in other Training Packages.

These generic requirements are:

- assessment must address the scope of this unit and reflect all components of the unit, i.e. the Elements, Performance Criteria, Range Statement, Evidence Requirements and Key Competencies
- a range of the most appropriate assessment methods/evidence gathering techniques is used to determine competency
- evidence must be gathered in the workplace wherever possible. Where no workplace is available, a simulated workplace must be provided
- the evidence collected must relate to a number of performances assessed at different points in time and in a learning and assessment pathway these must be separated by further learning and practice
- assessment meets the rules of evidence
- a judgement of competence should only be made when the assessor is confident that the required outcomes of the unit have been achieved and that consistent performance has been demonstrated

i) Specific evidence requirements

This part of the Evidence Guide provides details specific evidence that needs to be collected. It should be read carefully to ensure the rules of evidence, specifically validity and sufficiency, have been met.

TAA assessors must also ensure the evidence collected supports currency and authenticity. This is particularly important in an assessment only pathway which may rely more heavily on indirect and supplementary forms of evidence provided by TAA candidates.

j) Integrated assessment

The Training and Assessment Training Package (TAA04) units provide options for co-assessment with other units to enable integrated assessment and to minimise time and cost where a single assessment process may address the outcomes of a number of units.

TAA assessors are advised to consider co-assessment where this is relevant and appropriate. New assessment tools will need to be developed to reflect this approach to assessment. It is critical that these tools synthesise the evidence requirements in a way which can be unpacked to demonstrate achievement of the specified outcomes of each unit included in the integrated assessment and which meet the generic assessment requirements of all units.
Overview of unit template

<table>
<thead>
<tr>
<th>Unit code: the combined alpha/numeric code of the unit</th>
<th>Unit Title: the name of the unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Descriptor:</td>
<td>provides a brief descriptor of the unit</td>
</tr>
<tr>
<td>Competency Field:</td>
<td>identifies to which field the unit belongs</td>
</tr>
<tr>
<td>Application of the Unit:</td>
<td>provides an overview of the unit’s focus and content, setting out the parameters of the unit, its potential audience and relationship to other units</td>
</tr>
<tr>
<td>Elements: define the critical outcomes of a unit of competency</td>
<td>Performance Criteria: specify the level of performance required to demonstrate achievement of the Element. <em>Italicised</em> terms are elaborated in the Range Statement.</td>
</tr>
<tr>
<td>Element 1: outcome</td>
<td>1.1 PC ……</td>
</tr>
<tr>
<td></td>
<td>1.2 PC ……</td>
</tr>
<tr>
<td>Element 2: outcome</td>
<td>2.1 PC ……</td>
</tr>
<tr>
<td></td>
<td>2.2 PC ……</td>
</tr>
</tbody>
</table>

**Range Statement:** adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

*Italicised word/term may mean:*

| • RS |

**Evidence Guide:** provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence.

**Overview of assessment requirements:** explains the overall evidence requirements.

**Evidence requirements:** includes a number of sub-components. These are:

- **Required knowledge includes but is not limited to:**
  - specifies one by one the area/s of knowledge needed to meet Performance Criteria
  - lists specific content of that knowledge area

- **Required skills and attributes include but are not limited to:**
  - specifies one by one the technical or other skills and attributes needed to meet Performance Criteria
  - lists specific aspects of the skill and how it is used in the performance

- **Key Competencies or generic skills relevant to this unit:**
  - explains the seven Key Competencies, lists them and provides examples of how they are demonstrated in the unit

- **Products that could be used as evidence include:**
  - provides examples of tangible evidence or outputs, such as things made/performance observed

- **Processes that could be used as evidence include:**
  - provides examples of evidence of processes used to achieve outputs

- **Resource implications for assessment include:**
  - provides a list of resources that are required to support the assessment process

- **The collection of quality evidence requires that:**
  - provides clear generic requirements to be followed in collection of evidence and in making a judgement of competence

- **Specific evidence requirements must include:**
  - sets out specific evidence to be collected to reflect rules of evidence

- **Integrated assessment means that:**
  - suggests other units which could be co-assessed with this unit


Using the Training and Assessment Training Package (TAA04) units

Interpreting the Training and Assessment Training Package (TAA04) units

Each Training and Assessment Training Package (TAA04) unit is designed to provide a complete and detailed competency specification. The individual components of each unit are linked to each other to build an integrated and broad concept of competency. It is suggested that repackaging/reformatting the unit in landscape format will assist the user to recognise and interpret these links and to create a visual image of the unit as a whole. This approach will also assist in developing effective learning programs, learning resources and assessment tools.

Users will note the level of specificity in the Training and Assessment Training Package (TAA04) units. This level of specificity is designed to ensure the competency standards provide robust benchmarks for learning and/or assessment, with users able to interpret the requirements clearly and consistently.

In linking each unit component, users may note some overlap in content particularly between the Range Statement and the knowledge and skills requirements of the Evidence Guide. This overlap provides a cross reference to ensure these aspects of competent performance are addressed in learning and/or assessment. Because many areas of knowledge and skills are common to and applied as part of competent performance in different units, users will also see some overlap in the definitions used across units.

In a learning and assessment pathway, learning activities and experiences might be based around these common areas of required knowledge and skills, with applications developed against the performance requirements of specific units and verification of achievement through demonstration of the evidence requirements.

In an assessment only pathway, it may be appropriate to start with the Evidence Guide using the assessment advice provided in specific evidence requirements and then work back through the unit to ensure all components are addressed. Alternatively, the assessment process may be based around the Performance Criteria but also incorporate the Range Statement and Evidence Guide requirements.

Clustering units

Whilst most units in the Training and Assessment Training Package (TAA04) competency framework stand alone as a discrete competency standard, the units may also be linked together by the user to address different learning needs and/or integrated assessment.

Clustering units to create specific learning programs and/or integrated assessment may occur within the parameters of a defined Training and Assessment Training Package (TAA04) qualification or involve combinations of units that cut across a Training and Assessment Training Package (TAA04) qualification.

Any combination of units can be clustered resulting in Statements of Attainment for each unit assessed in the cluster.

This enables users to build competency profiles which suit their immediate skill development needs while building towards a qualification outcome, should that be a longer term goal.

In this way, the competency framework resembles a jigsaw, but a jigsaw where the pieces can lock together in a range of different combinations for different purposes.

Clustering will be very important in circumstances where specific competencies in training and/or assessment are required but not the whole TAA40104 Certificate IV in Training and Assessment. For example, in many industry settings, individuals may perform training and/or assessment functions as part of their overall work role. These skills are often complementary...
to core work functions and competence will only be required or relevant in a few Training and Assessment Training Package (TAA04) units.

For example, an individual providing specific training in one unit from an industry Training Package or someone responsible for organisational internal training may find that TAADEL301A Provide training through instruction and demonstration of work skills, TAADEL403A Facilitate individual learning and/or TAADEL404A Facilitate work-based learning reflects the competency profile needed for their training responsibilities. If they also assess, TAAASS402A Assess competence may be added to the cluster. In other circumstances other clusters may be more relevant.

This approach to using the Training and Assessment Training Package (TAA04) will be very important in many industry and organisational contexts.

Contextualising units

Contextualisation enables endorsed units of competency to be adjusted to reflect the immediate context in which the units are to be used. RTOs and other users of the Training and Assessment Training Package (TAA04) may need to contextualise units of competency to:

- reflect local or organisational needs
- suit particular delivery methods
- address learner characteristics
- provide for specific enterprise requirements.

However, any contextualisation must ensure that the integrity of the unit of competency is maintained. To guide users in contextualising Training and Assessment Training Package (TAA04) units the following advice is provided.

Contextualisation:

- cannot involve changes to the wording of Elements
- cannot involve the addition or removal of Elements and Performance Criteria
- can include substitution of specific industry terminology to generic wording in the Performance Criteria where this does not distort or narrow the competency outcomes
- can include amendments and additions to the Range Statement as long as such changes do not diminish the breadth of application of the competency and/or reduce its portability
- can include additional detail to the Evidence Guide in areas such as knowledge and skill requirements and resource and infrastructure requirements where these expand the breadth of the competency but do not limit its use.

Because the Training and Assessment Training Package (TAA04) units represent national benchmarks applied across the vocational education and training system, contextualisation should not limit the application of the competence to the immediate work context of the learner/candidate. One of the critical features of these standards is that competence must be transferable across different vocational education and training environments.

The specific evidence requirements of some units have been developed to ensure this transferability, for example relevance and application in recognised and non-recognised training environments, and application in both Training Package and non-Training Package environments. Simulation may be required to meet the range of applications/contexts of the evidence requirements.
Importing Training and Assessment Training Package (TAA04) units in other Training Packages

This Training Package also has a significant role to play in terms of cross-industry applications within other Training Packages. Importing Training and Assessment Training Package (TAA04) units into other Training Packages provides those industries with a range of units that support training and assessment roles relevant to their needs.

Importing the Training and Assessment Training Package (TAA04) units is encouraged to support the establishment of effective national benchmarks and to provide a means of industry-based national recognition for individuals undertaking training and/or assessment functions within their industry/enterprise.

The following advice is provided to support effective use of Training and Assessment Training Package (TAA04) units:

• where another Training Package developer or course developer intends to use a Training and Assessment Training Package (TAA04) unit in their qualification/s, the developer can select any unit or units in the Training and Assessment Training Package (TAA04) relating to their needs
• developers cannot replicate or diminish a Training and Assessment Training Package (TAA04) qualification by importing all units required for a Training and Assessment Training Package (TAA04) qualification. The number of imported units should relate to the specific competency requirements which need to be addressed within the industry or sector.
• developers intending to import Training and Assessment Training Package (TAA04) units should examine the units closely to ensure the assessment requirements of each unit can be met, including all Evidence Guide requirements
• developers intending to import Training and Assessment Training Package (TAA04) units into their qualifications must advise the body responsible for the Training and Assessment Training Package (TAA04), The Innovation and Business Industry Skills Council, to enable an information management system to be established for the effective application of Training and Assessment Training Package (TAA04) units
• developers intending to import Training and Assessment Training Package (TAA04) units into their qualifications must ensure all specific requirements relating to the Training and Assessment Training Package (TAA04) Assessment Guidelines are addressed. This includes advice on assessment only pathways and the “vocational competence” requirements of assessors. Developers must also ensure these vocational competence requirements are also met by delivery and assessment personnel.
Units of Competency not Packaged against a Qualification

Generally each unit of competency within a Training Package is packaged to one or more AQF qualifications. In special circumstances units of competency may be endorsed that are not packaged to an AQF qualification. The Training and Assessment Training Package (TAA04) contains one unit in this category – TAAASS301A Contribute to assessment.

This unit has been developed in response to an explicit need identified in the research and development of the Training and Assessment Training Package (TAA04). It addresses the competence of gathering quality evidence to support a candidate’s competence. This evidence, in conjunction with other gathered evidence, will contribute to the assessment decision against the relevant benchmark, by the qualified assessor.

This competence is typically required by an individual who may have technical/vocational expertise and/or may have a supervisory or mentoring/coaching work role, and for whom gathering evidence for assessment is an adjunct to principal work responsibilities. Application may occur in a range of circumstances including those where the organisation/enterprise uses a team assessment approach and/or in rural/remote areas where access to qualified assessors may be limited (and where assessor guidance can be provided by technology) and/or as part of the assessment arrangements for collecting evidence over a period of time and in a range of contexts.

It has a clear vocational workplace outcome.

It can be used as a stand-alone unit, as part of a cluster of units to form a relevant learning program for industry and through importation into other Training Packages.

This unit has not been packaged as part of the TAA40104 Certificate IV in Training and Assessment Training because there is another unit packaged within that qualification – TAAASS402A Assess competence – which is more appropriate and because its wide application could enable packaging at Certificate III or higher.
THE COMPETENCY STANDARDS

Learning Environment
TAAENV401A Work effectively in vocational education and training
TAAENV402A Foster and promote an inclusive learning culture
TAAENV403A Ensure a healthy and safe learning environment
TAAENV404A Develop innovative ideas at work
TAAENV501A Maintain and enhance professional practice

Learning Design
TAADES401A Use Training Packages to meet client needs
TAADES402A Design and develop learning programs
TAADES501A Design and develop learning strategies
TAADES502A Design and develop learning resources
TAADES503A Research and design e-learning resources
TAADES504A Develop and evaluate e-learning resources
TAADES505A Research and develop competency standards

Delivery and Facilitation
TAADEL301A Provide training through instruction and demonstration of work skills
TAADEL401A Plan and organise group-based delivery
TAADEL402A Facilitate group-based learning
TAADEL403A Facilitate individual learning
TAADEL404A Facilitate work-based learning
TAADEL405A Coordinate and facilitate distance-based learning
TAADEL501A Facilitate e-learning
TAADEL502A Facilitate action learning projects
TAADEL503A Provide advanced facilitation to support learning
TAADEL504A Lead and coordinate training services

Assessment
TAAASS301A Contribute to assessment
TAAASS401A Plan and organise assessment
TAAASS402A Assess competence
TAAASS403A Develop assessment tools
TAAASS404A Participate in assessment validation
TAAASS501A Lead and coordinate assessment systems and services

Training Advisory Services
TAATAS401A Maintain information requirements of training and/or assessment organisations
TAATAS501A Undertake organisational training needs analysis
TAATAS502A Prepare a tender bid
TAATAS503A Manage contracted work
TAATAS504A Facilitate group processes
Coordination, Management and Quality Competency Standards
TAACMQ501A Develop training and/or assessment organisational policies and procedures
TAACMQ502A Coordinate training and/or assessment arrangements for apprenticeships/traineeships
TAACMQ503A Lead and conduct training and/or assessment evaluations
TAACMQ504A Determine and manage scope of training/assessment services
TAACMQ505A Lead a team to foster innovation

Language, Literacy and Numeracy Practice
TAALLN401A Address language, literacy and numeracy issues within learning and assessment practice

Imported Units - Certificate IV Competency Standards
BSBMKG406A Build client relationships
BSBCMN404A Develop teams and individuals
BSBCMN405A Analyse and present research information
BSBCMN409A Promote products and services
BSBAUD402A Participate in a quality audit

Imported Units - Diploma Competency Standards
BSBMKG501A Evaluate marketing opportunities
BSBEBUS508A Build a virtual community
BSBMGT503A Prepare budgets and financial plans
BSBMGT504A Manage budgets and financial plans
BSBMGT506A Recruit, select and induct staff
BSBHR504A Manage industrial relations policies and processes
BSBRKG502A Manage and monitor business or records systems
BSBFLM512A Ensure team effectiveness
BSBFLM514A Manage people
CHCCAR501A Provide careers guidance
PSPGOV504B Undertake research and analysis