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Business Works is a series of training and assessment resources developed for qualifications within the Business Services Training Package.





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| Student name: |  |
| --- | --- |
| Assessor: |  |
| Date: |  |
| Business this assessment is based on: |  |
| Documentation reviewed as preparation: |  |

| A close up of a logo  Description automatically generated | **Section 1: Analyse resource requirements** |
| --- | --- |

Complete this section *before* the stakeholder meeting/s.

| Provide an overview of the business and its strategic objectives and goals. |  |
| --- | --- |
| Describe the regulatory and legislative context of the business that relates to managing resources. |  |
| Outline the specific objectives of the business unit/s that you are basing this project on.  *E.g., business unit, project or department that requires these resources.* |  |
| Resource 1  *Which resource are you going to focus on for this project and which activity does it relate to?* |  |
| Resource 2  *Which resource are you going to focus on for this project and which activity does it relate to?* |  |
| Resource 3  *Which resource are you going to focus on for this project and which activity does it relate to?* |  |
| Describe the stakeholders you need to meet with to discuss the nature and level of resource planning for all three resources.  Why are these stakeholders part of the consultation process?  *These may be separate stakeholders or the same ones for all three resources depending on the size and nature of the business* |  |
| When is this meeting/s set for?  *Provide the details of when and where this meeting/s is occurring* |  |
| What are the internal capabilities of the business in relation to the resourcing requirements? |  |
| What are the external resourcing requirements?  *Outline any supplier or purchasing considerations, budget or anything else relevant to obtaining quotations here.* |  |
| Provide an outline of the agenda / main discussion points for this meeting/s.  *Copy and paste this row if you are having more than one meeting and fill one out for each meeting.* |  |

Complete this section *after* the stakeholder meeting/s.

| Summarise the outcomes of the meeting/s.  Include any decisions that were made and next steps.  *Copy and paste this row if you are having more than one meeting and fill one out for each meeting.* |  |
| --- | --- |

| Attach:Paperclip | Business documentation reviewed | ☐ |
| --- | --- | --- |
| Recording of meeting/s if not observed in person or online by your assessor | ☐ |

| A close up of a logo  Description automatically generated | **Section 2: Planning for resources** |
| --- | --- |

You need to complete all three of the plans in this section for three different resources.

| **Resource Plan 1** | |
| --- | --- |
| Description of resource bid. |  |
| Options.  *Outline suitable options that may suit* |  |
| Budget and costs.  *Outline the total budget and provide a break down of the costs associated with this resource* |  |
| What are the timelines for identifying suitable resources and the acquisition of this resource? |  |
| Explain how the resource will be obtained/purchased following policy and procedures. |  |
| Explain the approval process for this resource. |  |
| Resource monitoring usage system  *Develop a monitoring system that can be used to monitor the usage and success of this resource in meeting business or project objectives.*  *Establish a measurable Key Performance Indicators (KPI).*  *Show how you approached establishing the KPI in a mathematical way using problem-solving.*  *List ways to monitor the KPI including a timeframe for evaluation.*  *Develop a formal policy and procedure document and attach to this section (note you can develop just one Resource Usage Policy with different sections for all three resources if you would like to do it this way).* |  |

**Risk and contingency planning**

*Complete the table to assess risks and develop contingencies for resources you are planning for.*

| **Potential risks** | **Planned Response** |
| --- | --- |
| *Risk associated with the acquisition or implementation of the resource* | *How will you mitigate the risk?* |
|  |  |
|  |  |

| Attach:Paperclip | Scope of Requirements document | ☐ |
| --- | --- | --- |
| Approval request for proposal (email) | ☐ |
| Resource Evaluation Policy and procedures developed | ☐ |
| Relevant policies and procedures related to the resource (workplace documentation or from the simulation pack) | ☐ |

| **Resource Plan 2** | |
| --- | --- |
| Description of resource bid. |  |
| Options.  *Outline suitable options that may suit* |  |
| Budget and costs.  *Outline the total budget and provide a break down of the costs associated with this resource* |  |
| What are the timelines for identifying suitable resources and the acquisition of this resource? |  |
| Explain how the resource will be obtained/purchased following policy and procedures. |  |
| Explain the approval process for this resource. |  |
| Resource monitoring usage system  *Develop a monitoring system that can be used to monitor the usage and success of this resource in meeting business or project objectives.*  *Establish a measurable Key Performance Indicators (KPI).*  *Show how you approached establishing the KPI in a mathematical way using problem-solving.*  *List ways to monitor the KPI including a timeframe for evaluation.*  *Develop a formal policy and procedure document and attach to this section (note you can develop just one Resource Usage Policy with different sections for all three resources if you would like to do it this way).* |  |

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| **Potential risks** | **Planned Response** |
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| *Risk associated with the acquisition or implementation of the resource* | *How will you mitigate the risk?* |
|  |  |
|  |  |

| Attach:Paperclip | Scope of Requirements document | ☐ |
| --- | --- | --- |
| Approval request for proposal (email) | ☐ |
| Resource Evaluation Policy and procedures developed | ☐ |
| Relevant policies and procedures related to the resource (workplace documentation or from the simulation pack) | ☐ |

| **Resource Plan 3** | |
| --- | --- |
| Description of resource bid. |  |
| Options.  *Outline suitable options that may suit* |  |
| Budget and costs.  *Outline the total budget and provide a break down of the costs associated with this resource* |  |
| What are the timelines for identifying suitable resources and the acquisition of this resource? |  |
| Explain how the resource will be obtained/purchased following policy and procedures. |  |
| Explain the approval process for this resource. |  |
| Resource monitoring usage system  *Develop a monitoring system that can be used to monitor the usage and success of this resource in meeting business or project objectives.*  *Establish a measurable Key Performance Indicators (KPI).*  *Show how you approached establishing the KPI in a mathematical way using problem-solving.*  *List ways to monitor the KPI including a timeframe for evaluation.*  *Develop a formal policy and procedure document and attach to this section (note you can develop just one Resource Usage Policy with different sections for all three resources if you would like to do it this way).* |  |

**Risk and contingency planning**

*Complete the table to assess risks and develop contingencies for resources you are planning for.*

| **Potential risks** | **Planned Response** |
| --- | --- |
| *Risk associated with the acquisition or implementation of the resource* | *How will you mitigate the risk?* |
|  |  |
|  |  |

| Attach:Paperclip | Scope of Requirements document | ☐ |
| --- | --- | --- |
| Approval request for proposal (email) | ☐ |
| Resource Evaluation Policy and procedures developed | ☐ |
| Relevant policies and procedures related to the resource (workplace documentation or from the simulation pack) | ☐ |

| A close up of a logo  Description automatically generated | **Section 3: Resource acquisition** |
| --- | --- |

| **Resource 1 acquisition** | |
| --- | --- |
| Summarise the process you went through to receive quotations for this resource. |  |
| Organisational compliance  *How did you adhere to your organisational procurement policy and procedures when receiving quotations?* |  |
| Timelines  *How did you meet the timelines you planned for?* |  |
| Quotations  List the suppliers/vendors you received quotations from  *Attach these quotations to this section of your portfolio* |  |
| Supplier preference and recommendation  *Which supplier do you prefer and why? Summarise your reasons here.*  *Develop an email outlining your recommendations to the relevant manager and attach this.* |  |
| Describe how you arranged the delivery / receival of the resource and the processes followed for allocation.  *Attach any evidence here as part of the process E.g., emails / receipts or delivery documentation, internal communication to staff.*  *If using the case study you don’t actually need to purchase and receive the resource but you can make assumptions and develop emails or internal communications about allocation as part of the simulation.* |  |

| Attach:Paperclip | Quotations obtained | ☐ |
| --- | --- | --- |
| Email recommending preferred supplier | ☐ |
| Evidence of resource allocation |  |

| **Resource 2 acquisition** | |
| --- | --- |
| Summarise the process you went through to receive quotations for this resource. |  |
| Organisational compliance  *How did you adhere to your organisational procurement policy and procedures when receiving quotations?* |  |
| Timelines  *How did you meet the timelines you planned for?* |  |
| Quotations  List the suppliers/vendors you received quotations from  *Attach these quotations to this section of your portfolio* |  |
| Supplier preference and recommendation  *Which supplier do you prefer and why? Summarise your reasons here.*  *Develop an email outlining your recommendations to the relevant manager and attach this.* |  |
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| **Resource 3 acquisition** | |
| --- | --- |
| Summarise the process you went through to receive quotations for this resource. |  |
| Organisational compliance  *How did you adhere to your organisational procurement policy and procedures when receiving quotations?* |  |
| Timelines  *How did you meet the timelines you planned for?* |  |
| Quotations  List the suppliers/vendors you received quotations from  *Attach these quotations to this section of your portfolio* |  |
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| A close up of a logo  Description automatically generated | **Section 4: Evaluation** |
| --- | --- |

| **Resource 1 evaluation** | |
| --- | --- |
| Provide an overview of the level of performance of the resource according to the data reviewed. |  |
| Has the resource been used in line with the product specifications and product/service standards? |  |
| How has the resource usage been used according to the budget for this resource? Were there any budget overruns? Explain reasons if this was the case. |  |
| Suggest improvements to work practices that could increase efficiency of this resource. |  |
| Does a corrective action need to be taken in relation to this resource? If yes, summarise this here and then implement it. Attach evidence of this implementation in this section.  Note: There only needs to be one corrective action taken for one resource. Write NA here if you have taken this for another resource. |  |

| Attach:Paperclip | Evidence of corrective action (1 only in total) | ☐ |
| --- | --- | --- |
| Formal report developed for management | ☐ |

| **Resource 2 evaluation** | |
| --- | --- |
| Provide an overview of the level of performance of the resource according to the data reviewed. |  |
| Has the resource been used in line with the product specifications and product/service standards? |  |
| How has the resource usage been used according to the budget for this resource? Were there any budget overruns? Explain reasons if this was the case. |  |
| Suggest improvements to work practices that could increase efficiency of this resource. |  |
| Does a corrective action need to be taken in relation to this resource? If yes, summarise this here and then implement it. Attach evidence of this implementation in this section.  Note: There only needs to be one corrective action taken for one resource. Write NA here if you have taken this for another resource. |  |

| Attach:Paperclip | Evidence of corrective action (1 only in total) | ☐ |
| --- | --- | --- |
| Formal report developed for management | ☐ |

| **Resource 3 evaluation** | |
| --- | --- |
| Provide an overview of the level of performance of the resource according to the data reviewed. |  |
| Has the resource been used in line with the product specifications and product/service standards? |  |
| How has the resource usage been used according to the budget for this resource? Were there any budget overruns? Explain reasons if this was the case. |  |
| Suggest improvements to work practices that could increase efficiency of this resource. |  |
| Does a corrective action need to be taken in relation to this resource? If yes, summarise this here and then implement it. Attach evidence of this implementation in this section.  Note: There only needs to be one corrective action taken for one resource. Write NA here if you have taken this for another resource. |  |

| Attach:Paperclip | Evidence of corrective action (1 only in total) | ☐ |
| --- | --- | --- |
| Formal report developed for management | ☐ |