

Trainer and Assessor Qualifications and Competency Management Procedure

1.0 Purpose

This procedure ensures that only appropriately credited and skilled trainers/assessors deliver and assess Training Products at Bendigo Kangan Institute (BKI). All training and assessment must be delivered by those who hold the required credentials.

This procedure outlines the process by which any relevant trainer and assessor qualification and competency evidence/documentation is captured, stored, updated, retained and managed in compliance with all Commonwealth and State legislation and regulations applicable to BKIs' scope of registration and operation as a Registered Training Organisation (RTO).

This policy applies to the documentation, capture, validation, storage and maintenance of trainer and assessor qualifications, competency and currency evidence, and to any BKI personnel involved in these processes, including:

- Hiring Managers
- Department Managers
- Reporting Line Managers
- Program Leads
- Talent Acquisition
- People Operations
- Teacher Capability
- Self-Assurance
- Academic Compliance

2.0 Scope

All BKI trainers and assessors, Ongoing and fixed term; sessional; third party personnel ; delivering in VCE Vocational Major (VCE VM), Victorian Pathways Certificate (VPC) or Vocational Education and Training (VET) delivered to school students (VDSS) programs, delivering nationally accredited training regardless of location or mode, and any other Training Product within BKIs scope of registration and operation as a Registered Training Organisation (RTO).

All staff and BKI personnel involved in the capture, validation and administration of trainer and assessor qualifications and competency evidence/information. All who contribute to the document management of the Staff Qualification Register (all information is held in the Educator Passport and able to be produced upon request). Including Educational and support personnel (e.g. Education Department Managers, Talent Acquisition, People Operations, Teacher Capability, and Self- Assurance) and BKI management, records and administrative personnel.

All stages of a trainer and/or assessor's engagement with BKI from the selection process through to their ongoing professional development and annual reviews are covered in this procedure. This also includes all additional requirements as outlined in (4.5)

Steps discussed for:

- **Selection Process** - Interview/Pre-Hire Qualification Checklist/(4.1)
- **Onboarding** - Induction/ Vocational Currency Matrix (VCM) (4.2)
- **Commencement & Ongoing (4.3)**
 - Annual Educator Passport cycle, including maintaining VCM, profiling and

Approval Authority: Head of People and Culture
Doc Custodian: Manager, Teacher Capability

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professional and vocational currency and their 'My Goal' plan with the end-of-year Review and required Professional Development and essential learning (ongoing)

- **Trainers and Assessors under Direction** (Credential Policy section 1C, 1D and Outcome Standards standard 3.2) **(4.4)**
- **Additional Requirements** (Specific Training Package ie. EAL, CGEA, Work Education, VCE VM, Transition Education, licensing requirements i.e. electrical, plumbing, and Registrations i.e. Nursing **(4.5)**)

3.0 Policy Reference

Trainer and Assessor Qualifications and Competency Management Policy

4.0 Procedural Steps

No.	Phases and steps	Name of role who actions
4.1	Selection Process - Interview/Pre-Hire Qualification Checklist	
4.1.1	Ensure that each interviewee/candidate has an accurate and up-to-date position description that clearly outlines the duties, responsibilities and expectations of the position, such as their qualification, vocational competencies, industry currency and professional development requirements.	Hiring Manager/and Trainer/Assessor
4.1.2	Hiring Manager informs Trainer/Assessor of all requirements, registrations, forms and documents needed in order to receive their contract from Talent Acquisition & People Operations, this must include: <ul style="list-style-type: none"> • TAE qualifications • All industry/vocational qualifications/statement of attainments/licenses • Evidence of professional development as a trainer and within the relevant vocation • Industry currency statement (as completed in the Industry engagement agreement • Working With Children Check (WWCC), unless they hold and maintain current registration with the Victorian Institute of Teaching (VIT) and are therefore exempt • Police Check (if required by the course/department) • Confirmation that the trainer does not fall within the meaning of a "Disallowed Person" within the meaning of the VET Funding Contract if they are to be 	Hiring Manager/Trainer/assessor

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	delivering government funded training.	
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4.1.3	<p>The Hiring Manager must complete the Pre-Hire Qualification Checklist by validating the credentials of the candidate from the documentation supplied by the candidate and follow up if not met.</p> <p>Validate all experience, qualifications, current (the past 12 months) industry skill, vocational competency, and reference checks relevant to the position (including trainers/assessors Ongoing and fixed term, sessional, third party personnel, Vocational Education and Training (VET) delivered to school students (VDSS) programs). Evidence/documentation may include:</p> <ul style="list-style-type: none"> • True certified copies, and/or • Sighted originals and signed copies <p><i>All evidence/documentation is to be scanned/copied/digitised for electronic administration. (Candidate please keep for VCM creation, if employed)</i></p> <p>As required by Credential Policy 1A, to deliver training and assessment without direction, trainers and assessors must hold one of the following:</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, • TAE40116 Certificate IV in Training and Assessment, • TAE40110 Certificate IV in Training and Assessment • A diploma or higher level qualification in adult education or vocational education and training • A secondary teaching qualification <u>and</u> one of the following credentials: <ul style="list-style-type: none"> ○ TAESS00011 Assessor Skill Set, or ○ TAESS00019 Assessor Skill Set or its successor, or ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor <p>All Training and Education (TAE) qualifications to be verified by the issuing RTO (except those issued by BKI) to ensure the qualifications are confirmed as genuine and status of Issuing RTO's/University.</p> <p>The verification can be either:</p> <ul style="list-style-type: none"> • A check of the issuance to the person (with the person's permission), or • A more general enquiry about the general features of 	Hiring Manager/ Candidate
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	<p>the document as one that the provider would issue (not requiring the person's permission).</p> <ul style="list-style-type: none"> • Checking the Issuer status via the BKI KanBe Hub 	
4.1.4	<p>Upon receipt of these documents, Talent Acquisition and People Operations are to generate a Personnel File and Trainer File for the Trainer/Assessor (the Trainer File is to sit within the Personnel File).</p> <p>Store all related files/documentation on the BKI People/HRIS Trainer File.</p> <p>Once this stage is complete, the next phase may commence.</p>	Hiring Manager/Talent Acquisition and People Operations

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No.	Phases and steps	Name of role who actions
4.2	Onboarding - Induction/ Vocational Currency Matrix (VCM) (4.2)	
4.2.1	<p>Onboarding</p> <p>New Trainer/Assessor to complete any onboarding requirements including new starter forms, payroll, super, ICT, etc</p> <p>New starters will also be advised when their induction day will be held.</p>	Trainer/Assessor and Talent Acquisition and People Operations
4.2.2	<p>Induction</p> <p>As part of the staff induction process, all new trainers and assessors will be provided with access to the Educator Passport. They are required to complete the Vocational Currency Matrix (VCM), documenting all relevant qualifications, current industry skills and knowledge, and vocational competencies.</p> <p>Upon completion, the matrix must be submitted to the designated supervisor for verification to ensure alignment with regulatory and organisational requirements.</p> <p>During orientation, trainers and assessors will also receive detailed information regarding:</p> <ul style="list-style-type: none"> The regulatory obligations associated with their role, including those outlined in the Standards for RTOs BKI's responsibilities in managing and maintaining evidence of qualifications and vocational competency Internal processes for ongoing compliance and professional development <p>This process ensures that all staff are fully informed of their responsibilities and that BKI maintains accurate and compliant records from the outset of employment.</p>	L&D /Teacher Capability/ New Trainer and Assessors
4.2.3	<p>Vocational Currency Matrix (VCM)</p> <p>Trainer / Assessor must complete their initial Vocational Currency Matrix (VCM) via the Educator Passport to demonstrate industry currency and where no nationally recognised qualification held, vocational competency has been established as well.</p> <p>The justifications of the VCM must be written to show a clear alignment of vocational competency (when deeming through experience) this includes employment history dates</p>	Supervisor and Trainer/Assessor/ Teacher Capability

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	<p>and aligned job activities to the individual unit to demonstrate currency (the past 24 months)</p> <p>Trainer / Assessor must have demonstrated that they have one of the training and assessment credentials to train and assess Non-TAE Training Products without direction (Credential Policy section 1A)</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, or • TAE40116 Certificate IV in Training and Assessment, or • TAE40110 Certificate IV in Training and Assessment, or • A diploma or higher-level qualification in adult education or vocational education and training • A secondary teaching qualification and one of the following credentials: <ul style="list-style-type: none"> ○ TAESS00011 Assessor Skill Set, or ○ TAESS00019 Assessor Skill Set or its successor, or ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor <p>In addition to the above, Outcome Standards clauses 3.2 and 3.3 also requires that all training and assessment must be delivered by those who have:</p> <ul style="list-style-type: none"> • Current industry skill and knowledge directly relevant to the training and assessment being delivered and assessed (skills that reflect current industry practice); • Vocational competence at least to the level being delivered and assessed (industry qualifications or the equivalent, i.e. vocational experience and industry currency); and have • Formally evidenced their continuing professional development annually (activities that develop and/or maintain an individual's skills, knowledge, expertise and other characteristics as a trainer or assessor, including skills and knowledge relating to engaging and supporting VET students) 	
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No.	Phases and steps	Name of role who actions
	<p>Industry currency is demonstrated through a range of activities which reflect the outcomes of the unit of competency with current industry practices and may include:</p> <ul style="list-style-type: none"> • Updated vocational qualifications. • Industry release and/or ongoing industry experience • engaging with industry to observe current practice; • volunteering or working part-time in the industry area; <p>undertaking accredited or non-accredited training relevant to the industry area;</p> <ul style="list-style-type: none"> • attending seminars, product releases and demonstrations, industry trade events • belonging to industry associations (although this is not sufficient on its own); and/or • reading industry journals and subscriptions (although this is not sufficient on its own) <p><i>Trainer / Assessor must submit their Vocational Currency Matrix via the Educator Passport for sign off by their supervisor</i></p>	
4.2.4	<p>Review and validate the Vocational Currency Matrix (VCM) submitted by the teacher, then approve or request further evidence or information.</p> <p>All individual Units of Competency under each Qualification that are being delivered and/or assessed should be included in the VCM.</p>	Program Lead / Manager

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No.	Phases and steps	Name of role who actions
4.3	Commencement	
4.3.1	<p>Program Lead or Manager (depending on department structure) organises and conducts a My Goals plan meeting with the Trainer/Assessor. Set annual professional development plan/core objectives.</p> <p>Inform the Trainer/Assessor of the end-of-year review requirement of the plan, and any evidence which will need to be provided in support of professional development activities undertaken as part of the individual's My Goals plan.</p> <p>Inform the trainer of the Educator Passport profiling tool that it should be completed prior to the meeting.</p>	Program Lead or Manager and Trainer/Assessor
4.3.2	<p>Trainer/assessor to complete any professional development activities internally or externally set within their individual My Goals plan. All professional and Vocational currency activities are to be recorded in the Educator Passport.</p> <p>Trainer/assessor to complete any further learning/online courses mandated by BKI via BKI People</p>	Trainer/Assessor
4.3	Ongoing	
4.3.3	<p>My Goals plan to be reviewed at end-of year. Any supporting professional development evidence can be uploaded within the relevant activity in My Goals in BKI People/HRIS.</p> <p>Access to the uploaded documents is restricted to Reporting Line Managers and HR administrators.</p>	Program Lead or Manager and Trainer/Assessor

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No.	Phases and steps	Name of role who actions
4.3.4	<p>Complete the annual Educator Passport cycle including The Vocational Currency Matrix (VCM) complete a profile and achieve relevant points through professional and vocational development to demonstrate currency, in line with the My Goals plan review periods.</p> <p>All trainers and assessors at BKI must complete/update their Vocational Currency Matrix (VCM) as part of completing the annual requirements of the Educator Passport (based on employment type). The VCM should also be updated and signed when changes to delivery/assessment occur. Documentary evidence confirming vocational qualifications, training and assessment qualifications, and any professional development activity must be sighted by the hiring manager to complete a Pre-Hire Qualifications Checklist before the candidate is offered employment. All supplied documentation and the complete Pre-Hire Qualification Checklist and retained within each individual's Trainer File (lodged within their Personnel File) overseen by People Operations. Upon employment with BKI, the new staff member will complete the Vocational Currency Matrix (VCM) with the Educator Passport. All Trainers and assessors are required to complete the Educator Passport (based on employment type) including the VCM, annually in alignment with the academic year.</p>	Trainer/Assessor
4.4	Individual working under direction (<i>Clauses 1.15- 1.20</i>)	
4.4.1	<p>Identify if a new Trainer and Assessor will deliver non-TAE Training Products and satisfies the following credential requirements.</p> <p>To deliver training and assessment without direction, one of the following credentials is required (Credential Policy 1A):</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, • TAE40116 Certificate IV in Training and Assessment, • TAE40110 Certificate IV in Training and Assessment • A diploma or higher-level qualification in adult Education or vocational education and training • A secondary teaching qualification <u>and</u> one of the following credentials: <ul style="list-style-type: none"> ○ TAESS00011 Assessor Skill Set, or 	Program Lead or Manager

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	<ul style="list-style-type: none"> ○ TAESS00019 Assessor Skill Set or its successor, or ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor 	
4.4.3	<p>Identify if an individual is actively working towards a training and assessment credential (as per Credential Policy section 1C).</p> <p>If an individual does not yet hold the required training and assessment credentials and was employed by BKI to deliver training and assessment, the individual must work under the direction of a trainer and assessor with the full training and assessment credential.</p> <p>To be actively working towards a credential, the person must be enrolled in and have commenced training in one of the following training and assessment credentials:</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, or • TAE50122 Diploma of Vocational Education and Training or its successor, <p>And be making satisfactory progress to enable them to complete the credential within two years of commencement.</p> <p>Note 1: without holding the required credentials, an individual can ONLY deliver training under the direction of a trainer and assessor with the full training and assessment credential.</p> <p>Note 2: The Individual who is working under direction MUST NOT determine assessment outcomes. They may conduct assessment and collect assessment evidence, however this will be assessed by a Trainer and Assessor with the full training and assessment credential.</p>	Program Lead or Manager

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4.4.4	<p>Identify if an Individual has the credentials to work under direction (Training and assessment under direction as per Credential Policy section 1D).</p> <p>In order for an Individual to work under direction, the Individual must hold one of the following credentials:</p> <ul style="list-style-type: none"> • TAESS00021 Facilitation Skill Set or its successor, • TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor, • TAESS00030 Volunteer Trainer Delivery and Assessment Contribution Skill Set or its successor, • TAESS00029 Volunteer Trainer Delivery Skill Set or its successor, • TAESS00020 Workplace Trainer Skill Set or its successor, • TAESS00028 Work Skill Instructor Skill Set or its successor, • TAESS00022 Young Learner Delivery Skill Set or its successor, • TAESS00015 Enterprise Trainer and Assessor Skill Set • TAESS00003 Enterprise Trainer and Assessor Skill Set, • TAESS00008 Enterprise Trainer – Mentoring Skill Set, • TAESS00013 Enterprise Trainer – Mentoring Skill Set, • TAESS00007 Enterprise Trainer – Presenting Skill Set, • TAESS00014 Enterprise Trainer – Presenting Skill Set, • A secondary teaching qualification without any additional credentials listed above in section 4.0 of this policy • <p>BKI will allow delivery of training by a person who does not hold the required training and assessment credential as described in the Credential Policy, in limited circumstances and for a limited time, as set out below:</p> <ul style="list-style-type: none"> • New Trainers entering the profession of vocational 	Program Lead or Manager
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	<p>teaching may deliver training under direction while actively enrolled in and have commenced training in either:</p> <ul style="list-style-type: none"> ○ TAE40122 Certificate IV in Training and Assessment or its successor, or ○ TAE50122 Diploma of Vocational Education and Training or its successor, and <p>be making satisfactory progress toward completing within two years of commencement.</p> <ul style="list-style-type: none"> • Industry expert means an individual who has directly relevant industry competencies, skills, knowledge and specialised industry or subject matter expertise who is engaged by the RTO based on that expertise. • Training and assessment under direction – individuals may deliver training and contribute to assessment, including conducting assessment collecting assessment evidence, provided they work under direction and do not make assessment judgements, if they hold any of the following credentials (but not any of the credentials listed above in 4.0 of this policy, which would permit them to deliver training and assessment without direction): <ul style="list-style-type: none"> ○ TAESS00021 Facilitation Skill Set or its successor, ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor, ○ TAESS00030 Volunteer Trainer Delivery and Assessment Contribution Skill Set or its successor, ○ TAESS00029 Volunteer Trainer Delivery Skill Set or its successor, ○ TAESS00020 Workplace Trainer Skill Set or its successor, ○ TAESS00028 Work Skill Instructor Skill Set or its successor, ○ TAESS00022 Young Learner Delivery Skill Set or its successor, ○ TAESS00015 Enterprise Trainer and Assessor Skill Set ○ TAESS00003 Enterprise Trainer and Assessor Skill Set, ○ TAESS00008 Enterprise Trainer – Mentoring Skill Set, ○ TAESS00013 Enterprise Trainer – Mentoring Skill Set, ○ TAESS00007 Enterprise Trainer – Presenting Skill Set, ○ TAESS00014 Enterprise Trainer – Presenting Skill Set, 	
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	<ul style="list-style-type: none"> ○ A secondary teaching qualification without any additional credentials listed above in section 4.0 of this policy <p>New trainers, industry experts and those delivering training and assessment under direction are required to work under the direction of a trainer and assessor with the following credentials:</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, • TAE40116 Certificate IV in Training and Assessment, • TAE40110 Certificate IV in Training and Assessment • A secondary teaching qualification and one of the following credentials: <ul style="list-style-type: none"> ○ TAESS00011 Assessor Skill Set, or ○ TAESS00019 Assessor Skill Set or its successor, or ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor • A diploma or higher-level qualification in adult education or vocational education and training 	
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No.	Phases and steps	Name of role who actions
4.4.5	<p>Meet with the Teacher working under direction within the 7 days of commencement to establish supervision arrangement. Supervision arrangements must contain:</p> <ul style="list-style-type: none"> • The details of the person working under direction • Their qualifications and experience • The reason that direction is required • The name and qualifications of the proposed BKI accredited supervisor providing direction • The direction required, and • The expected date direction is to commence. 	Program Lead/Manager & Trainer and assessor under direction
4.4.6	<p>Identify a trainer and assessor who holds one of the following credentials:</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, • TAE40116 Certificate IV in Training and Assessment, • TAE40110 Certificate IV in Training and Assessment • A secondary teaching qualification <u>and</u> one of the following credentials: <ul style="list-style-type: none"> ○ TAESS00011 Assessor Skill Set, or ○ TAESS00019 Assessor Skill Set or its successor, or ○ TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor • A diploma or higher-level qualification in adult Education or vocational education and training <p>who is also fully qualified with the current vocational competencies to provide direction by being responsible for providing oversight, guidance and quality assurance to ensure the quality of training and assessment delivered.</p>	Program Lead or Department Manager
4.4.7	<p>Conduct a meeting to complete the '<i>Application for Teacher Under Direction Form</i>'.</p>	Program Lead/Trainer or assessor providing direction and individual working under direction

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4.4.8	Approve the arrangement for the individual to work under the direction of the trainer or assessor providing direction.	Teaching Department Director
4.4.9	<p>Conduct the establishment meeting to establish a meetings schedule (for monitoring the arrangement).</p> <p>The arrangement may include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Meeting schedule developed <input type="checkbox"/> Discussed the training delivery for the course(s) <input type="checkbox"/> Discussed how the individual working under direction can provide input to preparation of training delivery and assessment <input type="checkbox"/> Discussed how to locate appropriate resources <input type="checkbox"/> Discussed strategies to support specific learners <ul style="list-style-type: none"> <input type="checkbox"/> Reasonable adjustment <input type="checkbox"/> Discussed assessment requirements and evidence gathering techniques <ul style="list-style-type: none"> <input type="checkbox"/> Rules of Evidence <input type="checkbox"/> Principles of Assessments <input type="checkbox"/> Assessment methods <input type="checkbox"/> Assessment tools <input type="checkbox"/> Supplementary Evidence <input type="checkbox"/> Assessment Records and evidence <input type="checkbox"/> Remote assessment 	Trainer or assessor providing direction and Individual working under direction.

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	<input type="checkbox"/> Assessment in the workplace <input type="checkbox"/> Discussed training delivery requirements: <ul style="list-style-type: none"> <input type="checkbox"/> Regulatory rules (Outcome Standards, Compliance Requirements, Credential Policy) <input type="checkbox"/> Training and Assessment Strategies <ul style="list-style-type: none"> <input type="checkbox"/> Packaging rules <input type="checkbox"/> Volume of learning <input type="checkbox"/> Amount of Training <input type="checkbox"/> Third Party delivery <input type="checkbox"/> Funding rules (VET Funding Contract) <ul style="list-style-type: none"> <input type="checkbox"/> Nominal Hours <input type="checkbox"/> Eligibility Criteria <input type="checkbox"/> Evidence of Participation (EOP) <input type="checkbox"/> Pre-Training Review (PTR) <input type="checkbox"/> How records are managed and potential that they might be required as evidence for audits or internal reviews <input type="checkbox"/> Discussed participation in assessment validation activities <ul style="list-style-type: none"> <input type="checkbox"/> Validation requirements <input type="checkbox"/> Other	
4.4.10	Complete the ' <i>Establishment of Supervision and Monitoring Plan</i> ' form.	Trainer or assessor providing direction and Individual working under direction.
4.4.11	Approve the 'Establishment of Supervision and Monitoring Plan'	Trainer or assessor providing direction
4.4.11	Send approved ' <i>Application for Teacher Under Direction</i> ' and ' <i>Establishment of Supervision and Monitoring Plan</i> ' to People Operations for saving the documents on the Individual's file and to Teacher Capability to enter onto the Register of Teachers working under direction.	Program Lead or Trainer providing direction

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No.	Phases and steps	Name of role who actions
4.4	Individual working Under Direction(Clauses 1.15- 1.20)	
	<input type="checkbox"/> Assessment in the workplace <input type="checkbox"/> Discussed training delivery requirements: <input type="checkbox"/> Regulatory rules (Outcome Standards, Compliance Requirements, Credential Policy) <input type="checkbox"/> Training and Assessment Strategies <input type="checkbox"/> Packaging rules <input type="checkbox"/> Volume of learning <input type="checkbox"/> Amount of Training <input type="checkbox"/> Third Party delivery <input type="checkbox"/> Funding rules (VET Funding Contract) <input type="checkbox"/> Nominal Hours <input type="checkbox"/> Eligibility Criteria <input type="checkbox"/> Evidence of Participation (EOP) <input type="checkbox"/> Pre-Training Review (PTR) <input type="checkbox"/> How records are managed and potential that they might be required as evidence for audits or internal reviews <input type="checkbox"/> Discussed participation in assessment validation activities <input type="checkbox"/> Validation requirements <input type="checkbox"/> Other	
4.4.10	Complete the ' <i>Establishment of Supervision and Monitoring Plan</i> ' form.	Trainer or assessor providing direction and Individual working under direction.
4.4.11	Approve the 'Establishment of Supervision and Monitoring Plan'	Trainer or assessor providing direction
4.4.12	Send approved ' <i>Application for Teacher Under Direction</i> ' and ' <i>Establishment of Supervision and Monitoring Plan</i> ' to People Operations for saving the documents on the Individual's file and to Teacher Capability to enter onto the Register of Teachers working under direction.	Program Lead or Trainer providing direction

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4.4.13	<p>Conduct weekly (for the first eight week) or fortnightly meetings to discuss progress and support required. Discussion may include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Meeting schedule developed <input type="checkbox"/> Discussed the training delivery for the course(s) <input type="checkbox"/> Discussed how individual working under direction can provide input to preparation of training delivery and assessment <input type="checkbox"/> Discussed how to locate appropriate resources <input type="checkbox"/> Discussed strategies to support specific learners <ul style="list-style-type: none"> <input type="checkbox"/> Reasonable adjustment <input type="checkbox"/> Discussed assessment requirements and evidence gathering techniques <ul style="list-style-type: none"> <input type="checkbox"/> Rules of Evidence <input type="checkbox"/> Principles of Assessments <input type="checkbox"/> Assessment methods <input type="checkbox"/> Assessment tools <input type="checkbox"/> Supplementary Evidence <input type="checkbox"/> Assessment Records and evidence <input type="checkbox"/> Remote assessment <input type="checkbox"/> Assessment in the workplace <input type="checkbox"/> Discussed training delivery requirements: <ul style="list-style-type: none"> <input type="checkbox"/> Regulatory rules (Outcome Standards, Compliance Requirements, Credential Policy) <ul style="list-style-type: none"> <input type="checkbox"/> Training and Assessment Strategies <input type="checkbox"/> Packaging rules <input type="checkbox"/> Volume of learning <input type="checkbox"/> Amount of Training <input type="checkbox"/> Third Party delivery <input type="checkbox"/> Funding rules (VET Funding Contract) <ul style="list-style-type: none"> <input type="checkbox"/> Nominal Hours <input type="checkbox"/> Eligibility Criteria <input type="checkbox"/> Evidence of Participation (EOP) <input type="checkbox"/> Pre-Training Review (PTR) <input type="checkbox"/> How records are managed and potential that they might be required as evidence for audits or internal reviews <input type="checkbox"/> Discussed participation in assessment validation activities <ul style="list-style-type: none"> <input type="checkbox"/> Validation requirements <input type="checkbox"/> Other 	Supervisor providing direction & Individual working under Direction
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No.	Phases and steps	Name of role who actions
4.4	Individual working under Direction (<i>Clauses 1.15- 1.20</i>)	
4.4.14	Records meeting details, notes and actions in the <i>Monitoring Record Sheet for Individual Working Under Direction form</i> - which is to be uploaded onto the teacher's My Goals Development Plan (specifically under the relevant activity) and a copy provided monthly to the Director.	Program Lead
4.4.15	Forward the Monitoring records of all meetings to the Director.	Teacher giving direction
4.4.16	Approve completion of the arrangement to work under direction – <i>Teacher Under Direction Arrangement Completion form</i>	Teaching Department Director
4.4.17	Notify People Operations on completion of credential requirements.	Program Lead or Education Manager
4.4.18	Save all documentation on the individual's BKI People/HRIS employee file within seven days of the end of the supervision arrangement of the Individual under direction.	Program Lead or Education Manager
4.4.19	Maintain a register of all individuals working under direction. Add list to register in SharePoint. Mark completion of professional requirement credentials in register when reached.	People Operations
4.4.20	Conduct regular monitoring audits to ensure that the plans are implemented, and individuals complete the required qualifications within the timeframes permitted.	Teacher Capability

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No.	Phases and steps	Name of role who actions
4.5	Additional training package requirements	
4.5.1	<p>Requirements</p> <p>In addition to the above requirements- Trainers and Assessors must meet any specific requirements:</p> <ul style="list-style-type: none"> • Training Package ie. EAL, CGEA, Work Education, VCE VM, Transition Education) • Licensing requirements i.e. electrical, plumbing • Registrations i.e. Nursing • Through professional development activities, staff must maintain their Professional and Vocational Currency, by continuous development and improvement of their teaching and vocational skills and knowledge; • A current working with children check (WWCC) <ul style="list-style-type: none"> ○ Teachers who hold current registration with the Victorian Institute of Teaching (VIT) are exempt from requiring a Working with Children (WWCC) clearance (previously called a Working with Children Check or WWCC). • Police Check • Victorian Institute of Teaching (VIT) registration for delivery of Vocational Education and Training (VET) delivered to school students e.g. VCE Vocational Major (VM), Vocational Education and Training (VET) delivered to school students (VDSS) 	
4.5.1.1	Teachers must teach and assess students in the manner and in keeping with the standards expected by the VCAA, VRQA as well as meeting other legal responsibilities in relation to discrimination, mandatory reporting, occupational health and safety and privacy	Program Lead/ Manager
4.5.1.2	Staff are expected to hold Permission to teach and be registered with the Victorian Institute of Teaching.	Program Lead/ Manager

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No.	Phases and steps	Name of role who actions
4.5.2	Application for Permission to teach	
4.5.2.1	All individuals who are to be employed to undertake the duties of a teacher in a school but who do not meet the qualifications requirements for registration as a teacher need to make an application.	VIT registrations officer
4.5.3	Suitability and Registration requirements that must be met	
4.5.3.1	<p>The application needs to be in the approved form and include the following</p> <ul style="list-style-type: none"> • Payment of the Application fee • Consent signed by the applicant for the Victorian Institute of Teaching (VIT) to conduct a national criminal history check on the applicant as a state police check • Evidence of appropriate skills and suitability to teach as defined in the Education and Training Reform Act 2006. Evidence that the applicant meets the relevant requirements of the Outcome Standards in relation to being able to demonstrate that they have appropriate content knowledge of the subject area/s that they will be teaching. • Evidence of English Language competence. • The requirements for being suitable for registration as a teacher are outlined in section 2.6.9(2) of the <i>Education and Training Reform Act 2006</i>. There are also a number of grounds under which the institute may refuse to grant registration. The institute may also provide conditions or limitations in relation to registration. 	Applicant for Permission to Teach – VIT Registration

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No.	Phases and steps	Name of role who actions
4.5.4	Endorsement and Subsequent Applications	
4.5.4.1	<p>A Permission to Teach (PTT) application needs to also be endorsed. PTT (VET) applicants can seek endorsement by either the principal of the employing school or in the case of an RTO by the head of the department that is employing the teacher.</p> <p>When an individual is applying for a subsequent grant of PTT they need to provide evidence that they have completed the activities outlined in the plan submitted with their previous application for PTT.</p>	Principal or RTO Department Head
4.5.5	VIT Supervision Monitoring and Documentation	
4.5.5.1	<p>Supervision may include oversight of planning and implementation of class programs, and professional support in relation to</p> <ul style="list-style-type: none"> teaching methods and practices student welfare; and assessment procedures and related matters. <p>There is no requirement that a registered teacher be present with the PTT holder at all times.</p>	VIT Registered Teacher
4.5.5.2	<p>As an option, a comprehensive list of accredited Initial Teacher Education programs for secondary school teachers from across Australia is available through the Australian Institute of Teacher and School Leadership Accredited Teaching Program search tool.</p> <p>https://www.aitsl.edu.au/deliver-ite-programs/apl</p>	VIT Registered Teacher
4.5.6	Trainers and Assessors who provide training in any AQF qualification or skill set from the Training and Education Package	TAE trainers and Assessors

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4.5.6.1	<p>In addition to the above requirements - Trainers and Assessors who provide training in any AQF qualification or skill set from the Training and Education Package as per Credential Policy Section 2, must either:</p> <ol style="list-style-type: none"> hold one of the following credentials: <ul style="list-style-type: none"> TAE50122 Diploma of Vocational Education and Training or its successor TAE 50116 Diploma of Vocational Education and Training or TAE 50111 Diploma of Vocational Education and Training or TAE 50216 Diploma of Training Design and Development or TAE 50211 Diploma of Training Design and Development or A higher-level qualification in adult education or vocational education and training <p>or</p> <ol style="list-style-type: none"> hold one of the following credentials: <ul style="list-style-type: none"> TAE40122 Certificate IV in Training and Assessment or its successor, TAE40116 Certificate IV in Training and Assessment, TAE40110 Certificate IV in Training and Assessment A secondary teaching qualification and one of the following credentials: <ul style="list-style-type: none"> TAESS00011 Assessor Skill Set, or TAESS00019 Assessor Skill Set or its successor, or TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor 	
4.5.7	Licensing requirements	
	Ensure areas such as trades have licensing requirements are held under federal or state industry requirements. Such as electrical, plumbing, hospitality and real estate.	Hiring Manager
4.5.8	Registrations	

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	Ensure areas such as trades have licensing requirements are held under federal or state industry requirements. For example, Nursing.	Hiring Manager
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5.0 Procedural Swimlane Flowchart (only if required)

N/A

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6.0 Roles and Responsibilities

Role	Responsibilities
Hiring Manager/	<ul style="list-style-type: none"> Review provided documentation and complete via the Pre-Hire Qualification Checklist for new candidates. Ensure the correct position description.
Candidate	<ul style="list-style-type: none"> To provide all documents including qualifications/industry experience, registration licenses, WWCC, Police check etc.
Program Lead / Manager	<ul style="list-style-type: none"> Approve vocational currency (industry) submissions in the Educator Passport Review and approve via the Vocational Currency Matrix annually as part of the Educator passport Follow-up teachers who are at risk of not being current, and plan action/PD to maintain currency, and revised date to rectify (Part of My Goals cycle). Action plan resides with teaching area. If escalation is required, P&C business partner is engaged.
Trainer/Assessor	<ul style="list-style-type: none"> Complete the annual Educator Passport Cycle including the vocational currency Matrix (VCM), profiling tool and required professional and vocational currency (by employment type) in alignment with their My Goals plan.
Teacher Capability	<ul style="list-style-type: none"> Teacher Capability Uplift Teacher Induction/Pathway Offering professional currency activities Review submissions of external professional currency Maintain the Educator Passport Platform Assist in technical issues with the Educator Passport

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<p>Talent Acquisition & People Operations</p>	<ul style="list-style-type: none"> • Collate the resume, qualifications, transcripts, certificates, WWC and any other relevant documentation. • Enter qualification details of new teacher into Skills Register based on documentation provided • Validate WWCC, save notifications, and monitor compliance for expiring WWCCs. • Following the onboarding process, the Pre-Hire Qualification Checklist and other supplied documentation and store in the personnel file. • HR business partner will be engaged if agreed action plan has not been adhered & the teacher is in breach of 'teacher currency' policy (escalation) – abiding by the BKI policy statement: <ul style="list-style-type: none"> ○ BKI is committed to ensuring that our teachers are supported to maintain the currency of the skills which benefits them in their professional development and career opportunities, whilst ensuring that our students reap the rewards of being taught by highly skilled teachers whose methods, practices and currency of knowledge are best practices. All teachers working at BKI are required to complete the Educator Passport each year and successfully complete the program in accordance with the required timeframe. Failure to comply with this requirement may result in disciplinary action being initiated.
<p>Teacher or Trainer Under Direction</p>	<p>An individual who has been appointed that does not have one of the following training and assessment credentials (Credentials Policy section 1A):</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, or • TAE40116 Certificate IV in Training and Assessment, or • TAE40110 Certificate IV in Training and Assessment • A secondary teaching qualification <u>and</u> one of the following credentials: <ul style="list-style-type: none"> • TAESS00011 Assessor Skill Set, or • TAESS00019 Assessor Skill Set or its successor, or • TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor • A diploma or higher-level qualification in adult Education or vocational education and training • and is required to work under the direction of a trainer or assessor with one of the relevant training and assessment credentials as approved by the Director of the teaching Department.

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Role	Responsibilities
Academic Compliance	<ul style="list-style-type: none"> • Endorsement of the Vocational Currency Matrix (VCM) in the Educator Passport to be used. • Facilitation and coordination of internal & external audits (including random check of trainer and assessor compliant documentation including the Vocational Currency Matrix and currency history in the Educator Passport. •
Self-Assurance	<ul style="list-style-type: none"> • Endorsement of the Vocational Currency Matrix (VCM) in the Educator Passport to be used. • Assist in the development of VCMs
Assessors who only conduct assessments	<p>An assessor who conducts assessments only, including making assessment judgements, and holds the credentials specified in the Credential Policy section 1B in order to conduct assessments including the professional development required in their field of practice as well as the current knowledge in the area of vocational training learning and assessment. Assessors must hold one of the following credentials (Credential Policy section 1B):</p> <ul style="list-style-type: none"> • TAE40122 Certificate IV in Training and Assessment or its successor, or • TAE40116 Certificate IV in Training and Assessment, or • TAE40110 Certificate IV in Training and Assessment, or • TAESS00019 Assessor Skill Set or its successor, or • TAESS00011 Assessor Skill Set, or • TAESS00001 Assessor Skill Set, or • A secondary teaching qualification <u>and</u> one of the following credentials: <ul style="list-style-type: none"> • TAESS00011 Assessor Skill Set, or • TAESS00019 Assessor Skill Set or its successor, or • TAESS00024 VET Delivered to School Students Teacher Enhancement Skill Set or its successor • A diploma or higher-level qualification in adult Education or vocational education and training

7.0 Definitions

Word/Term	Definition
Competency	The consistent application of knowledge and skill to the standard of performance required in the workplace. It embodies the ability to transfer and apply skills and knowledge to new situations and environments.

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Current industry skills	<p>Current industry skills are the knowledge, skills and experience required by trainers and/or assessors in accordance with the Outcome Standards to ensure that their training and assessment is based on current industry practices and meets the needs of industry. Current industry skills may be informed by consultations with industry and may include, but are not limited to:</p> <ul style="list-style-type: none"> a. having knowledge of and/or experience using the latest techniques and processes; b. possessing a high level of product knowledge c. understanding and knowledge of legislation relevant to the industry and to employment and workplaces; d. being customer/client-oriented; e. possessing formal industry and training qualifications; and <p>training content that reflects current industry practice</p>
My Goals plan	<p>My Goals is BKIs professional development process which applies to all trainers and assessors, including those who are sub-contracted or sessional. Found in BKI People/HRIS.</p>
Professional Currency	<p>Professional Currency is demonstrated through the participation in activities that develop and/or maintain an individual's skills, knowledge, expertise and other characteristics as a trainer or assessor. This includes both formal and informal activities that encompass the practice of vocational education and training, facilitation, digital literacies, and student support , included in competency based training and assessment.</p> <p>Examples of professional currency activities include:</p> <ul style="list-style-type: none"> a) participation in courses, workshops, seminars, conferences, or formal learning programs; b) participation in professional associations or other learning networks, e.g. Communities of Practice; c) personal development through being mentored and peer observation; <p>participation in moderation or validation activities.</p>

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Vocational Currency	<p>Vocational currency is demonstrated through participation in activities that develop and/or maintain an individual's industry skills, knowledge, expertise and other characteristics related to the qualifications and units of competency delivered by the individual. This includes both formal and informal activities that encompass vocational competencies, currency of industry skills and knowledge and practice.</p> <p>Examples of vocational currency activities include:</p> <ul style="list-style-type: none"> a) participation in courses, workshops, seminars, conferences, trade shows or formal learning programs; b) industry engagement, industry release, industry projects; c) participation in professional associations or other learning networks such as communities of practice;
Registered Training Organisation (RTO)	<p>Registered Training Organisation. A training organisation listed on the National Register, or by the relevant state based authority, as a registered training organisation. BKI's RTO number is: 3077</p>

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Word/Term	Definition
Vocational Currency Matrix (VCM)	The Matrix is BKIs standardised document/framework for the input of all trainer and assessor qualification(s) and competency information. Current versions are via the soft copy template and the new version is created in the Educator Passport. As of 1 st of January 2026, all ongoing VCMs must be completed in the Educator Passport.
Staff Qualification Register	.This information is held within the Educator Passport and can be produced on request for audit purposes.
Vocational Competency	Vocational competency is broad industry knowledge and experience, usually combined with a relevant industry qualification. Vocational competency must be considered on an industry-by-industry basis and with reference to the guidance provided in the Assessment Guidelines of the relevant Training Package.
Victorian Certificate of Education (VCE)	The Victorian Certificate of Education (VCE) is the certificate that the majority of students in Victoria receive on satisfactory completion of their secondary education. The VCE provides diverse pathways to further study or training at university or TAFE and to employment.
Victorian Certificate of Education Vocational Major (VCE VM)	The Victorian Certificate of Education Vocational Major (VCE VM) is a 'hands-on' option for students in Years 11 and 12 and is a credential awarded to secondary school students who successfully complete year 11 and 12. The VCE VM gives students practical work-related experience, as well as literacy and numeracy skills and the opportunity to build personal skills that are important for life and work. VCE VM is an accredited senior secondary school qualification
Victorian Institute of Teaching (VIT)	The Victorian Institute of Teaching (VIT) is an independent statutory authority for the teaching profession, whose primary function is to regulate members of the teaching profession in Victoria – from early childhood care, and care services, to senior secondary education.
VRQA	<p>The Victorian Registration and Qualifications Authority (VRQA) is the Victorian statutory authority responsible for ensuring that employers of apprentices and trainees and providers of education and training (including course and qualification owners) meet quality standards, and that information is readily available to support informed choice in education and training.</p> <p>The VRQA:</p> <ul style="list-style-type: none"> - registers certain education and training providers and awarding bodies - registers certain qualifications and accredits courses (VCE VM, VCE, VETiS) <p>regulates apprenticeships and traineeships in Victoria</p>

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Word/Term	Definition
Educator Passport	A platform where teachers can record their Vocational Currency Matrix along with their ongoing Professional and Vocational currency, with supporting evidence. The platform also allows for advertising and registration for professional development programs that hold currency for in-house and VET sector-wide.

8.0 Related Documents

Title	Location
Trainer and Assessor Qualifications and Competency Management Policy	BKI Policies, Procedures & Forms
Application for Teacher Under Direction Form	BKI Policies, Procedures & Forms, part of Teacher Under Supervision Plan and Monitoring Record
Establishment of Supervision and Monitoring Plan	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Monitoring Record Sheet for Teacher Under Direction	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Teacher Under Direction arrangement completion form	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Development Review TP CODE Assigned Trainers	BKI Intranet
Vocational Currency Matrix (VCM)	Educator Passport and BKI Intranet

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9.0 Related Documents

Title	Location
Trainer and Assessor Qualifications and Competency Management Policy	BKI Policies, Procedures & Forms
Application for Employment of Teacher Under Direction	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Establishment of Supervision and Monitoring Plan	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Monitoring Record Sheet for Teacher Under Direction	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Teacher Under Direction arrangement completion form	BKI Policies, Procedures & Forms, part of Trainee Under Supervision Plan and Monitoring Record
Development Review TP CODE Assigned Trainers	BKI Intranet
Completing your Vocational Currency Matrix (VCM) – with notes	BKI Intranet, Educator Passport

10.0 Version Control and Change History

Ver.	Issue Date	Document Custodian	Description of Change	Approval Authority
1.0	27 Mar 2019	-	Initial Procedure	Chief Academic Officer
1.1	-	-	Minor change: upgrade effective date amended to 1 st July 2019	Chief Governance and Quality Officer
1.2	-	-	Update process and terminology	Chief Governance and Quality Officer
2.0	18 Feb 2022	Head of Quality and Assurance	Updates process, roles and responsibilities.	Chief Governance and Quality Officer
3.0	11/07/2025	Manager, Teacher Capability	Updates to ensure compliance with the Outcome Standards for NVR Registered Training Organisations effective from 1 July 2025.	Head of People and Culture

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11.0 Document Owner and Approval Body

Document Custodian	Approval Authority	Approval Date	Issue Date	Scheduled Review Date
Manager, Teacher Capability	Head of People and Culture	11/07/2025	11/07/2025	11/07/2028