

<b>Title</b>	<b>Manage, monitor and report on finances for a facility</b>		
<b>Level</b>	<b>6</b>	<b>Credits</b>	<b>20</b>

<b>Purpose</b>	People credited with this unit standard are able to: manage financial planning and budgeting for a facility; manage costing and pricing for a facility; manage finances and internal controls for a facility; and monitor and report on finances for a facility.
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<b>Classification</b>	Recreation and Sport > Recreation and Sport - Management
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 All learning and assessment within this unit standard must be carried out in accordance with the following, as relevant to their role:
  - relevant legislation including Health and Safety at Work Act 2015, Sport and Recreation New Zealand Act 2002, Resource Management Act 1991, Building Act 2014, Privacy Act 1993, and Human Rights Act 1993, Hazardous Substances and New Organisms Act 1996, and any subsequent amendments;
  - district plans, regional plans, Local Government bylaws;
  - industry codes, standards, and good practice guidelines including Facility Management Manual, 2015, New Zealand Recreation Association (NZRA) available via <https://www.nzrecreation.org.nz/Site/community/guidelines/facilities.aspx>;
  - organisational policies and procedures including Emergency Action Plans (EAPs), Standard Operating Procedures (SOPs), and the use of personal protective equipment (PPE).
- 2 For assessment purposes:
  - The candidate must be assessed while undertaking a facility management role.
  - Evidence must be gathered over a period of time that enables reflection, evaluation and ongoing development within the role.
- 3 Definition
 

*Facility* refers to a workplace where the candidate is working, or the workplace in which their training placement is occurring, and may include but is not limited to – a sport, recreation, exercise, event, or outdoor facility.

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### Outcomes and performance criteria

#### Outcome 1

Manage financial planning and budgeting for a facility.

**Performance criteria**

- 1.1 Identify the financial objectives for a facility.
- 1.2 Prepare an annual budget for a facility to support the achievement of financial objectives.
- Range includes but is not limited to – sound costings, accurate user and membership data, income and expenditure forecasts.

**Outcome 2**

Manage costing and pricing for a facility.

**Performance criteria**

- 2.1 Identify the funding policy for a facility.
- 2.2 Evaluate whether the facility's budget supports its funding policy, and amend the budget as required.
- 2.3 Establish the cost of facility programmes and services.
- 2.4 Set a price for facility programmes and services.
- 2.5 Identify potential for alternative resources to enhance costing and pricing for a facility.
- Range may include but is not limited to – sponsorship, user pays, multi-use of facilities, community resources.

**Outcome 3**

Manage finances and internal controls for a facility.

**Performance criteria**

- 3.1 Manage the chart of accounts for a facility.
- 3.2 Monitor and oversee sales procedures for a facility.
- Range may include but is not limited to – cash sales procedures, credit sales procedures.
- 3.3 Manage income for a facility.
- Range may include but is not limited to – sales, loans and leases, grants and subsidies, community resources.

3.4 Manage expenditure for a facility.

Range includes but is not limited to – payroll procedures.

3.5 Manage purchasing for a facility.

3.6 Manage internal controls for a facility.

Range may include but is not limited to controls related to – delegation levels, budgets and goals, financial feedback, personal transactions, motor vehicle use, credit cards, travel expenses, conflicts of interest, fixed assets, unusual transactions, human resources.

#### Outcome 4

Monitor and report on finances for a facility.

#### Performance criteria

4.1 Monitor and report on the financial performance, financial position, and cash flow of a facility in a timely, reliable, and meaningful way.

<b>Planned review date</b>	31 December 2023
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#### Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	26 April 2018	N/A

<b>Consent and Moderation Requirements (CMR) reference</b>	0099
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

#### Comments on this unit standard

Please contact Skills Active Aotearoa Limited [info@skillsactive.org.nz](mailto:info@skillsactive.org.nz) if you wish to suggest changes to the content of this unit standard.