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| Assessment Title | Assessment 3 –  Monitor Team Performance |

## Competency Details

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| Unit code/s and title/s | BSBXTW401 Lead and facilitate a team |
| Qualification code/s and title/s | BSB40520 Certificate IV in Leadership and Management |
| Business unit/Work group | Business and Arts / Management Program |

## Instructions

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| Method/s of assessment | Knowledge (written) & Practical |
| Overview of assessment | **Assessment 3 - Monitor Team Performance**   * This is a knowledge & practical assessment * You will be assessed individually * There are two (2) tasks in total   Overview of the Assessment  This part of the project requires you to monitor team performance. Specifically, you are required to:   * Measure team member performance against agreed work plans * Provide timely and constructive performance feedback to team members according to expected organisational standards * Identify specific learning and development opportunities to improve team and individual performance and behaviours * Implement action plans to address individual and team training needs   **This assessment is divided into two (2) parts:**   * + Task 3.1 Measure team performance   + Task 3.2 Provide performance feedback & Create & implement plans to address training needs |
| For this assessment | This Assessment comprises of two (2) tasks in total.   * You are required to provide researched answers for two (2) tasks using the templates provided to them. * Read the questions carefully before you start your responses. * You are required to provide short answer responses for each question * You will access the below template and submit the completed template via TAFE SA Learn. * If you do not understand any of the questions, ask your trainer/assessor for help.   You will be given access to the simulated business, [Bounce Fitness](https://learn.tafesa.edu.au/course/view.php?id=14627) via TafeSA LEARN.  **Submission:**   * You are to submit your assignment via TAFE SA Learn * No email submissions will be accepted. |
| Time allowed | Submission required by the due date as indicated on LEARN |
| Location of assessment | At TAFE SA, or the workplace, or an environment with computer and internet access. The assessments will be completed in the student’s own time and submitted by the due date as indicated in the introductory email on LEARN |
| Decision making rules | To receive a satisfactory outcome for this assessment you must:   1. Complete Tasks 3.1 & 3.2 of this assessment as described above in **Tasks to be assessed** 2. You will provide enough detail in your responses to demonstrate process applied.   If assessed as unsatisfactory you will be provided feedback and given two (2) weeks to complete the resubmission against the same assessment tasks. |
| Assessment conditions | This assessment must be unsupervised and must conducted in a safe workplace or simulated environment and will include access to:   * workplace documentation and resources * software and technology |
| Resources required | TAFE SA facilities or a location with equipment and infrastructure required:   * Access to a computer with internet access * Access to the TAFE SA network * Access to LEARN * Microsoft office (Word, PowerPoint, Excel etc), Adobe Acrobat Reader * Unit Assessment Overview (UAO)   Specific resources for this assessment:   * Computer with internet and email access and a working web browser * Installed software: MS Word, Adobe Acrobat Reader   **A workplace or simulated workplace that will allow you access to**:  Workplace documentations refer to [Bounce Fitness](https://learn.tafesa.edu.au/course/view.php?id=14627) simulated business accessed via TafeSA LEARN. |
| Result notification and reassessment information | Result notification   * The assessment result will be satisfactory or not satisfactory. * Your educator will provide feedback through the LEARN platform. * Your educator will result a final grade for the unit at the end of each study period.   Reassessment   * All students are entitled to two attempts to achieve each assessment task within any unit enrolment period. * If you have been assessed as not satisfactory will be provided feedback you will be given two (2) weeks to complete the resubmission against the same assessment tasks. * Re-assessment timeframe will be negotiated with your assessor. |

**BACKGROUND**

In your role as a Team Leader, you are required to monitor your team’s performance against the agreed work plans. It has been 10 days since you had the discussion with your team and allocated tasks to achieve the team’s goals and talked about collaboration opportunities.

**Feedback**

You have received the following feedback from the cross-collaboration partners, the team members themselves and your own observations: -

***Team Member #1******–*** *has met and exceeded the individual goals set in Assessment 1 however has not met their requirements/deadlines in relation to the collaboration opportunities. The feedback you have received from the parties that they were required to collaborate with on this project have indicated that they have been unresponsive to emails and phone calls.*

***Team Member #2 –*** *has not met the individual goals, however you are aware that they have been short staffed on several shifts in the past week that may have impacted on the achievement of the goals. You have received feedback that although they have been responsive in relation to their collaboration requirements, more time still needs to be put aside to get the best benefits from the collaboration exercise. You are concerned that although there have been staffing issues this team member does not seem to be aware of the safety implications of not adhering to the* ***Pre-start System and Equipment Check.***

**Task 3.1 Measure Team Performance**

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| **ASSESSMENT INSTRUCTIONS** |
| 1. **Review** the following documents for this task:    1. Completed **Performance Plan** from **Task 1.1**   This template will be used as basis for reviewing each team member’s actual performance.   * 1. Completed **Collaboration Opportunities** from **Task 2.3**   Each team member’s actual performance from the tasks found in this template will be evaluated against their expected performance indicated in the **Performance Plan**.   1. **Collate** the feedback received into **5 dot points** in preparation for your discussion with your team 2. Locate the **Performance Evaluation** following. Complete one copy for each team member.   The **Performance Evaluation** is divided into two sections. To complete this template:   * 1. **Individual Evaluation**       1. Review the following: * **Performance Plan** from Task 1.1   + 1. Compare each team member’s actual performance recorded against their expected performance in the **Performance Plan**.   Identify if the following criteria has been met:   * + - Expected outcomes     - Expected goals     - Expected behaviours   For each criterion, provide specific written remarks about each team member’s performance. |
| * 1. **Team Evaluation**   Based on each team member’s performance evaluation, you must evaluate the performance of the whole team:   1. Identify common areas of performance that were met 2. Identify common areas of performance that were not met 3. Identify common reasons for not meeting expected performance 4. Provide a summary of your feedback to the team. This must include whether or not the required outcome for the team was met. 5. **Submit the following on LEARN** |
| * 1. A summary of the feedback received – 5 dot points   2. Performance Evaluations for each team member & team |

* 1. **– Summary of Feedback**

**Team member 1**

* Individual goals met and exceeded.
* Collaboration requirements/deadlines not met. Unresponsive to emails and phone calls from collaborators.

Team Member 2

* Individual goals not met.
* Short-staffing may have impacted performance
* Unaware of safety implications of not adhering to Pre-start System and Equipment Check.

**3.1 Performance Evaluation Template**

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| **Completed by** | Andre Alexandrov | | | |
| **Workplace/ Organisation** | **Bounce Fitness** | | | |
| **Date Completed** | **20/09/2023** | | | |
| * + - 1. **Individual Evaluation** | | | | |
| **Team Member 1** | Fitness instructor | | | |
| **Criteria** | | **Were these met?** | | **Remarks** |
| **Yes** | **No** |
| 1. **Expected Outcomes** | |  |  | The instructor has managed to satisfy their expected outcome of writing support documents for equipment checks |
| 1. **Expected Goals** | |  |  | The Fitness instructor has completed and exceeded at the their goal of writing the guides |
| 1. **Expected Behaviours** | |  |  | Although they have done as expected for their behaviours for the individual task, they have not managed to fulfil the team behaviours regarding communication |
| **OVERALL FEEDBACK TO TEAM MEMBER 1** | | | | |
| The Fitness instructor has done well regarding all their individual tasks and has managed to complete each on time, however they have not done adequately in the team tasks and communication with the other team members. In general the instructor has done well but has room for improvement. | | | | |
| **Team Member 2** | Office assistant | | | |
| **Criteria** | | **Were these met?** | | **Remarks** |
| **Yes** | **No** |
| 1. **Expected Outcomes** | |  |  | The assistant has not completed their expected outcome of creating a timetable, possibly due to being short staffed |
| 1. **Expected Goals** | |  |  | The assistant has not completed their expected goals of creating a clear timetable for each of the checks need to be done, this is possibly due to being short staffed |
| 1. **Expected Behaviours** | |  |  | Although they have managed to complete the team behaviour of communication, although lacking in being able to benefit from it, they have not completed research on applicable laws and or regulations to understand the importance of the pre-start procedure |
| **OVERALL FEEDBACK TO TEAM MEMBER 2** | | | | |
| The Office assistant has been unable to meet their outcomes and goals, although this could have been impacted by recent short staffing issues. Another issue with the team member is that they have not been able to fully benefit from collaborating with other team members. They also have an issue regarding their understanding of the importance of the Pre-start System and Equipment Check. | | | | |
| * + - 1. **Team Evaluation** | | | | |
| **Areas of Performance that Were Met** | | | | |
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| **Areas of Performance that Were Not Met** | | | | |
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| **Reasons for Not Meeting Expected Performance** | | | | |
| There are three main reasons why | | | | |
| **OVERALL FEEDBACK TO TEAM** | | | | |
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**Task 3.2 Provide Performance Feedback & Create Plans to Address Training Needs**

**BACKGROUND**

*You have now completed individual meetings with each team member.**During each meeting you:*

1. *Gave feedback on each team member’s performance. The feedback you provided corresponded with the information found in the completed* ***Performance Evaluation*** *template from Task 3.1 and was constructive.*
2. *During the meeting you were able to identify at least one training need for each team member. These training needs corresponded to the expected outcomes, goals, and behaviours that were not met by each team member in their* ***Performance Evaluation*** *template.*

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| |  | | --- | | **ASSESSMENT INSTRUCTIONS** | | 1. Review the following templates:  * **Performance Evaluation** from Task 3.1  1. Locate the **Action Plan** following. Complete the following sections of the **Action Plan:**    1. **Individual Training Needs**   Based on your review of the Performance Evaluations (3.1), identify the following:   * + - At least **one training need for each team member**.     - At least two opportunities to address each team member’s training need:   + At least one learning opportunity   *Learning opportunities refer to activities that focus on discussing knowledge needed for a specific work function. These can include but are not limited to:*   * + 1. *Training sessions*     2. *Seminars*   + At least one development opportunity   *Development opportunities refer to activities that focus on applying acquired knowledge to ensure one’s capabilities in the workplace. These can include but are not limited to:*   * + 1. *Job shadowing*     2. *Workshops*     - Planned date of implementation for each opportunity     - Expected outcome for each opportunity     - Actual date of implementation     - Actual outcome   1. **Team Training Needs**   Review the **‘Team Evaluation’** section of your completed **Performance Evaluation** template. Based on your review, identify the following:   * + - At least one training need for the team   Use the common reasons for not meeting expected performance identified in the **Performance Evaluation** as basis for your training needs.   * + - At least two opportunities to address the team training need * At least one learning opportunity * At least one development opportunity   + - Planned date of implementation for each opportunity     - Expected outcome for each opportunity     - Actual date of implementation     - Actual outcome  1. To implement the individual and team training needs, you will need to **send an email to each team member with their individual training opportunities, and then an email to the whole team with the team learning opportunities.**     * Each email should include a copy of the **Action Plan** for that team member, or team.    * You will need to advise the team members that are required to report back to you by a date specified by yourself as to when the training took place and the outcome that was achieved so that you can documented this within the action plan.  * You are to also ensure that you provide your team members an opportunity to discuss the plan with you by advising team members how they can ask questions should they have any in accordance with BOUNCE’s standard on the **Encouragement of Employee Feedback on Business & Administrative Decisions** found in the BOUNCE [Communications Policy](https://learn.tafesa.edu.au/pluginfile.php/1928963/mod_folder/content/0/Communication%20Policy.pdf)  1. **Submit the following documents on LEARN:** -    1. **Three Action Plans** – one for each team member and one for the team    2. **Three Emails** – one for each team member and one for the team | |

**3.2 Action Plan template**

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| **Completed by** |  | | | | | | | |
| **Workplace/Organisation** |  | | | | | | | |
| **Date Completed** |  | | | | | | | |
| **Individual Training Needs – Team Member 1** | | | | | | | | |
| **Individual Training Need** | | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | | **Date  Implemented** | | **Actual Outcome** |
|  | |  |  |  |  | |  | |
| **Individual Training Need** | | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | | **Date  Implemented** | | **Actual Outcome** |
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| **Completed by** |  | | | | | | | |
| **Workplace/Organisation** |  | | | | | | | |
| **Date Completed** |  | | | | | | | |
| **Individual Training Needs - Individual Training Needs – Team Member 2** | | | | | | | | |
| **Individual Training Need** | | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | | **Date  Implemented** | | **Actual Outcome** |
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| **Individual Training Need** | | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | | **Date  Implemented** | | **Actual Outcome** |
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| **Addressing Team Training Needs** | | | | | |
| **Team Training Need** | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
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| **Team Training Need** | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
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Email Template – Team Member 1:

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| --- | --- |
| **To:** |  |
| **From:** |  |
| **Date:** |  |
| **Subject:** |  |
| [Insert content here] | |

Email Template – Team Member 2:

|  |  |
| --- | --- |
| **To:** |  |
| **From:** |  |
| **Date:** |  |
| **Subject:** |  |
| [Insert content here] | |

Email Template – Team:

|  |  |
| --- | --- |
| **To:** |  |
| **From:** |  |
| **Date:** |  |
| **Subject:** |  |
| [Insert content here] | |