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| sAssessment Title | Assessment 4 – Support the team |

## 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 |

## Instructions

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| Method/s of assessment | Knowledge (written) & Practical (oral) |
| Overview of assessment | **Assessment 4 – Support the Team**   * This is a knowledge & practical assessment * You will be assessed individually * There are two (2) tasks in total   **Overview of the project**  This assessment project is based on you being a team leader for Bounce Fitness and requires you to provide coaching to staff to enhance workplace culture   * Support individuals according to organisational requirements to work towards common team goals * Facilitate team to identify, brainstorm, report and resolve task related issues and inefficiencies * Use problem solving skills to deal with any team, task, or individual challenges   This assessment is divided into two(2) parts:  **Assessment 4 – Support the team**   * + Task 4.1 Identify task issues & inefficiencies + provide support   + Task 4.2 Identify, address challenges & implement actions |
| For this assessment | This Assessment comprises of two (2) tasks in total.   * Students 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 |

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| 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 all tasks 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:   * relevant workplace documentation and resources * case studies and, where possible, real situations * interaction with others |
| 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 Outline (UAO)   Specific resources for this assessment:   * Two volunteers who will play as your team members * Computer with internet and email access and a working web browser * Installed software: MS Word, Adobe Acrobat Reader * Microsoft teams or Zoom or a recording device of your own * **Bounce policies and procedures** relevant to: * [Conflict Resolution Policy & Procedures](https://learn.tafesa.edu.au/pluginfile.php/1928963/mod_folder/content/0/Conflict%20Resolution%20Policy%20and%20Procedure.pdf) * [Progressive Discipline Policy](https://learn.tafesa.edu.au/pluginfile.php/1928963/mod_folder/content/0/Progressive%20Discipline%20Policy.pdf) |

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| 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. |

**Part 4 Case Study Overview**

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| **Teamwork Challenges** |
| You are currently working as a team lead in Bounce Fitness.  You have noticed in recent reports and customer complaints that there seems to be issues within your team’s performance.  As team lead, it is your duty to help resolve these issues to improve performance in the workplace.  Reviewthe case study scenarios outlined below before starting Task 4.1. |

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| **Conflict with Clients** |
| Two of your customers, a married couple, are unhappy with the service your team member recently provided. Their complaint is that your team member had been very inappropriate towards them. Your team member had flirted with one of the customers, and upon rejection of their advances, was indifferent to the customers’ concerns. The customers had to request service from a different team member to attend to their concerns.  Due to this, the other team member was unable to attend to the concerns of other customers. The customers they were unable to attend to were not satisfied and had also filed a complaint about their performance.  As team leader, you are accountable for your team members. You are to facilitate a meeting to coach your team members to improve their behaviour and performance.  Access the character brief required for this case study scenario from the link provided below:  [**Conflict with Clients Character Brief**](https://learn.tafesa.edu.au/mod/resource/view.php?id=1196101&redirect=1)  Discuss the character brief with your volunteers before conducting your role play activity. |
| **Safety Hazards** |
| A recent customer complaint has been filed to you regarding the equipment and facilities of Bounce Fitness.  According to the complaint, one of the treadmills is malfunctioning. The customer reported that the treadmill’s speed varies involuntarily as they are running. The customer had also reported that some hand weights were not put away and were scattered around the facilities.  You ask the team member who was assigned to this duty what happened. They had explained that they were unable to completely check the equipment due to another team member inviting them to join them on their break. The assigned team member had complied despite not being on their own break schedule. Bounce Fitness has a rule that each team member is to take their break one at a time. This means that if one team member is on break, the other team member must remain on duty to attend to customers.  This has caused both your team members to argue with one another on who is at fault.  As a fitness instructor, you are to facilitate a meeting to resolve these safety hazards in the workplace.  Access the character brief required for this case study scenario from the link provided below:  [**Safety Hazards Character Brief**](https://learn.tafesa.edu.au/mod/resource/view.php?id=1196104&redirect=1)  Discuss the character brief with your volunteers before conducting your role play activity. |

**Task 4.1 Identify Task-Related Issues and Inefficiencies & provide support**

**4.1 Organisational Requirement Outline**

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| **Completed  By** | Andre Alexandrov |
| **Workplace/ Organisation** | Bounce Fitness |
| **Date  Completed** | Andre |
| **Organisational Requirement for Supporting Individuals** | |
| **Bounce Fitness Document** | **Code of Ethics** |
| **Requirement:** | |
| It is the responsibility of each Bounce Fitness employees to contribute to the continued development of the profession  through the critical evaluation of professional practice, research, apprenticeships, continuing education and  membership of the association. | |
| **Organisational Requirement for Managing Conflict** | |
| **Bounce Fitness Document** | Conflict Resolution Policy and Procedure |
| **Requirement:** | |
| An employee who considers that they have a dispute or grievance should raise the matter with  their immediate supervisor as a first step towards resolution. The two parties should discuss the  matter openly and work together to achieve a desired outcome | |

**4.1 Meeting Minutes**

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| **Date:** 10/10/2023 | **Time:** 4:30 | | **Location:** Online |
| **Purpose of the meeting** | Andre | | |
| **Facilitator** | Andre | | |
| **Notetaker** | Andre | | |
| **Attendees** | Andre Alexandrov, Simon Johnson, Chanmonich Phe | | |
| **Agenda Item 1 Case Studies** | | | |
| Discussion | |  | |
| * The meeting was opened with an introduction of each member and thanking them for joining. * The issues to be discussed where introduced, the first case was started with Simon going over his side. * It was expressed that each person can share their side of the story before any judgment will be passed. | | | |
| **Agenda Item 2 Task-Related Issues** | | | |
| Discussion | |  | |
| Case 1:  Simon explained that he is new to the company and is unfamiliar with the Bounce code of conduct.  Simon has conveyed that his comments where not meant to be flirtatious and where misinterpreted.  Simon explained that he ignored the issue as he felt uncomfortable in the situation.  Simon mentioned that he could have apologised to the customers.  Chanmonich has apologised for leaving her customers to help Simon.  She explained that she helped because the customers seemed quite upset and that she would have asked someone else to help but no one was around.  Case 2:  Simon again explained that he is a new employee and isn’t fully aware of the policies regarding who needs to be on the floor.  Chanmonich explained that she only wanted to talk with Simon for a few minuets and did not think it would be a big deal and when she asked him, he was available.  Simon added that he went with Chanmonich as he wanted to fit in with the other workers. | | | |
| **Agenda Item 3 Task-Related Inefficiencies** | | | |
| Discussion | |  | |
| Case 1:  Both Simon and Chanmonich had mentioned that the lack of proper procedure for these situations made everything inefficient.  Chanmonich had felt that an inefficiency was essentially caused by Simon just dropping his customers to Chanmonich without any thought of her and her customers.  Chanmonich has alluded to not feeling fully supported as there where no other staff to help with her customers or to deal with Simon’s customers.  Case 2:  The main inefficiency found was that if someone is away for any reason there is a chance that issues can be missed.  It was also noted just how much of an impact having less knowledge of the policies can impact others. | | | |
| **Agenda Item 4 Action Items** | | | |
| Discussion | |  | |
| Case 1:  Simon mentioned that in future he can apologise to avoid conflict.  It was also mentioned to have a better hand off process to make these situations easier and more efficient to deal with, also taking some of her clients for the time being to lessen her load.  There should also be a familiarity for these situations something like a webinar could be useful.  Case 2:  Simon and Chanmonich again mentioned having something like a webinar to go over the rules again.  I had mention maybe adding a poster that does over the main rules in the workplace to always remind everyone of the rules. | | | |

**4.1 Issues and Inefficiencies Plan – Case Study 1**

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| **Completed by** | Andre Alexandrov | | | | |
| **Workplace/Organisation** | Bounce Fitness | | | | |
| **Date Completed** | 15/10/2023 | | | | |
| **Task-Related Issue & Task Related Inefficiency** | **Action Item** | **Planned Date of Implementation** | **Expected Outcome** | **Implementation date** | **Follow up date to check outcomes** |
| 1. Task Related Issue –   Lack of knowledge on Organisational policy and procedure regarding Handling complaints Raised by Clients | Webinar on how to properly handle client complaints and general communication with clients | 20/10/2023 | It is expected that everyone becomes comfortable with being able to address complaints handled by clients, and to have better general communication with them. | 21/10/2023 | 25/10/2023 |
| 1. Task Related Inefficiency –   Improper hand off of client to team mate due to a lack of communication about the incident | Webinar on how to properly hand off clients to a team mate and proper hand off communication | 20/10/2023 | The expected outcome is for everyone to know how to effectively hand off clients to another team member when required | 21/10/2023 | 25/10/2023 |

**Issues and Inefficiencies Plan – Case Study 2**

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| **Completed by** | Andre Alexandrov | | | | |
| **Workplace/Organisation** | Bounce Fitness | | | | |
| **Date Completed** | 15/10/2023 | | | | |
| **Task-Related Issue** | **Action Item** | **Planned Date of Implementation** | **Expected Outcome** | **Implementation date** | **Follow up date to check outcomes** |
| 1. Task related issue -   Unfamiliarity with Organisational policy and procedure | Webinar on organisational policy and procedure and to have important policies and procedures up on a poster in the break room | 19/10/2023 | The expected outcome is for everyone to become familiar with the organisational policy and procedures, and to have easy access to main policies and procedures | 20/10/2023 | 25/10/2023 |
| 1. Task related inefficiency –   Under staffing on gym floor causing potential dangers | Webinar to explain the importance of making sure someone is always on the gym floor looking after equipment. Also a team meeting to remind and ensure everyone understands the importance of following the policy and schedules | 19/10/2023 | For everyone to become familiar with the organisational policy and procedures and the importance of making sure that the gym floor is always looked after | 20/10/2023 | 25/10/2023 |

**Follow Up Email to Team After Meeting:**

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| **To:** | [Simon@bouncefitness.com](mailto:Simon@bouncefitness.com)  [Chanmonich@bouncefitness.com](mailto:Chanmonich@bouncefitness.com) |
| **From:** | Andre@bouncefitness.com |
| **Date:** | 15/10/2023 |
| **Subject:** | Teem meeting follow up |
| Hi Simon and Chanmonich  Just a quick follow up from the meeting we held recently about the two incidents, conflict with client and Safety Hazards.  With the first incident, I have created a webinar to be held on the 20th of October, this webinar will cover both the task related issue of Lack of knowledge on handling complaints Raised by Clients and the inefficiency of Improper hand off of client to team mate.  Regarding the second incident I have created another webinar to be held on the 19th of October to cover the issue of Unfamiliarity with Organisational policy and procedure and the inefficiencies that stem from that, I have also developed a poster to be put up in the break room to keep everyone familiar with the policies and procedures at Bounce Fitness. With both webinars I will meet back with everyone to gage the effectiveness of them.  I believe these to webinars and the poster can really help the team reduce the amount and impact of issues and inefficiencies that may arise in the future.  If anyone has any question, please feel free to contact me.  Kind Regards,  Andre Alexandrov | |

**Task 4.2 Identify & address challenges**

**‘Challenges’ Case Studies**

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| **Team Challenges** |
| As team lead, you’ve recently noticed that your team seems to be facing challenges with regards to their performance. You’ve conducted a discussion with each team member and upon collation of the discussion notes, you’ve noticed that there are common problems throughout the team.  One common problem is lack of communication; project updates are not being communicated and researched information are not being shared among the team. The other common problem is conflict in opinions and methods; your team members are unable to compromise with each other and just end up constantly disagreeing with each other. |

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| **Task Challenges** |
| You have noticed that each of your team members have been reporting project delays more often than usual. You have decided to check with each of your team members on what seems to be affecting their performance.  After an individual check-up session with each of your team members, you’ve noticed that there seems to be common difficulties in performing tasks.  One of those difficulties is poor time management. Your team members are unable to plan their projects accordingly, causing frequent shifts in schedule. Another difficulty noted is the constant crashing of the applications used for projects, impacting quality and time for project output. |

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| **Individual Challenges** |
| You’ve recently reviewed your team’s overall key performance indicators (KPIs) and noted that your team’s performance has not been meeting KPIs lately. You’ve checked up on each of your team members just to see how they’re doing for the week.  Each team member has shared some difficulties that are personal in nature. One of your team members note that they have trouble fitting in the workplace, causing them to become withdrawn and not open to communication with others in the workplace.  Another concern your team member brings up is their lack of focus; they are easily distracted from their work, impacting their allocated time and their project output. |

**4.2 Workplace Challenges Action Plan**

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| **Completed by** | Andre Alexandrov | | | |
| **Workplace/Organisation** | Bounce Fitness | | | |
| **Date Completed** | 10/10/2023 | | | |
| **Title of Case Study** | Communication Challenges | | | |
| **Workplace Challenge to Address** | Lack of communication | | | |
| **Bounce Fitness Policy and Procedure** | Communication Policy | | | |
| **Requirement of Policy and Procedure relevant to case study chosen.** | Failure to Disperse Information:   * Standardise the approach or method for dispersing a specific type of communication * Determine which communication channels work best with the approach * Ensure that each information is clear, concise, and complete to avoid misinterpretation | | | |
| **Action Item** | **Planned Date of Implementation** | **Expected Outcome** | **Implementation date** | **Follow up date to check outcome** |
| Create a standard way to share researched information and completed documents, have everything stored in a centralised location for everyone to pull from such as SharePoint. Create documentation for the implementation.  Create standard methods for researching and completing documents, use open-source methods that are in common use in the work force. | 230/10/2023 | The expected outcome is for everyone to start using the standard process of sharing information and to be fully trained on its usage  The expected goal is for everyone to have working knowledge of research method developed/chosen. | 30/10/2023 | 5/11/2023 |

**Email Template to Implement Actions:**

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| **To:** | [BounceTeam@bouncefitness.com](mailto:BounceTeam@bouncefitness.com) |
| **From:** | [Andre@bouncefitness.com](mailto:Andre@bouncefitness.com) |
| **Date:** | 18/10/2023 |
| **Subject:** | Standardized Information Sharing |
| Hi everyone,  I’m just writing to go over some issues that have been brought to me about the teams communication and information sharing  Firstly we need to establish a standardized approach for sharing researched information and completed documents. All relevant materials should be stored in a centralized location, such as SharePoint, for easy access. Additionally, we should create documentation on how to use the system. We aim to use open-source methods commonly employed in the workforce to standardize research and document completion methods. This is planned to be completed by the 30th of October**.** The end objective is to have everyone adopt the standardized process for sharing information and ensure that all team members are proficient in. We also aim to ensure that everyone possesses a working knowledge of the research methods developed or chosen.  If anyone has any question, please feel free to contact me.  Kind Regards,  Andre Alexandrov | |