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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**

* 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** | | | | |
| The creation of guides on how to perform checks was completed to a satisfactory standard. | | | | |
| **Areas of Performance that Were Not Met** | | | | |
| The areas that where not met was the creation of a schedule that clearly shows when tasks need to be completed. | | | | |
| **Reasons for Not Meeting Expected Performance** | | | | |
| One reason on why some expected performances where not met was due to some unforeseen circumstances of being short staffed for a few days, this meant the timetable was not completed in time, in addition to not understanding some fundamental parts of the goals.  Additionally, the communication and collaboration within in the team was not satisfactory and could have led to some of the performances not being met. | | | | |
| **OVERALL FEEDBACK TO TEAM** | | | | |
| Overall, the team has done well individually, the problems arise when looking at their ability to communicate and collaborate with each other through out their tasks, this led to some goals not being completed. | | | | |

**Task 3.2 Provide Performance Feedback & Create Plans to Address Training Needs**

**BACKGROUND**

**3.2 Action Plan template**

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| **Completed by** | Andre Alexandrov | | | | |
| **Workplace/Organisation** | **Bounce Fitness** | | | | |
| **Date Completed** | **20/09/2023** | | | | |
| **Individual Training Needs – Team Member 1** | | | | | |
| **Individual Training Need** | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| Collaboration and communication | Attend a 2hr session on Collaboration and Communication held on site at bounce fitness | 26/09/2023 | The expected outcome is for the Instructor to gain a better understanding of the need of properly communicating and collaborating with team members | 26/09/2023 | The team member has improved on their collaboration skills |
| **Individual Training Need** | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| Collaboration and communication | Mentoring meeting with a team leader once a fortnight for a month | 03/10/2023 | Learning and participating in different departments with how they collaborate with each other to achieve goals. | 03/10/2023 | They have observed and participated in the collaborative assessments as expected. |

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| **Completed by** | Andre Alexandrov | | | | |
| **Workplace/Organisation** | **Bounce Fitness** | | | | |
| **Date Completed** | **20/09/2023** | | | | |
| **Individual Training Needs - Individual Training Needs – Team Member 2** | | | | | |
| **Individual Training Need** | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| WHS training | Attend a 1hr seminar on WHS and its importance of adhering to policies | 27/09/2023 | The expected outcome of the seminar is for the member to have a better understanding om why WHS policies are important and the safety implications of not adhering to the Pre-start equipment check (PSEC) | 27/09/2023 | The team member has gained understanding of the need of WHS policies and |
| **Individual Training Need** | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| WHS training | Mentoring meeting with a team leader/WHS officer once a fortnight for 2 months | 04/10/2023 | To learn from others in the department of what can go wrong if the PSEC is not adhered too and the need of WHS policies | 04/10/2023 | The team member was responsive in the meetings and have understood the need for the policies and checks. |

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| **Addressing Team Training Needs** | | | | | |
| **Team Training Need** | **Learning Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| Collaboration and planning | An open workshop over two days where team members learn how to effectively use collaboration tools, and also are taught how to effectively create schedules that can consider some unforeseen circumstances | 05/10/2023 | The expected outcome is for each team member to better understand how to extract the most from collaboration sessions, and the best ways to create personal schedules to complete tasks and goals | 05/10/2023 | Staff have learnt how to better utilise scheduling tools |
| **Team Training Need** | **Development Opportunity** | **Planned Date of Implementation** | **Expected Outcome** | **Date  Implemented** | **Actual Outcome** |
| Collaboration and planning | Shadow the team leader on collaborative tasks, use and follow schedules created by the team leader/Assistant manager | 10/10/2023 | For each team member to learn the practical applications of schedules and collaboration tasks in higher managerial positions | 10/10/2023 | Each team member has shadowed the team leader and gained knowledge from the tasks. |

Email Template – Team Member 1:

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| **To:** | Simon Johnson |
| **From:** | Andre Alexandrov |
| **Date:** | 21/09/2023 |
| **Subject:** | Learning and development plan |
| Hi Simon,  As Discussed in the meeting I have developed an action plan attached to this email to assist your learning and development over the next 2 months.  The plan includes you attending a 2hr learning session on how to perform collaborative tasks and proper communication standards at bounce fitness, there will also be a part where you will shadow me in some collaborative sessions once a fortnight for the next two months, please let me know what dates and times work best for you at least 1 weeks in advance of those meetings.  I would also like you to email me once you have completed the learning session and at the end of the month after shadowing me so that I can understand what you have learnt and the effectiveness of this development plan. I would like for you to go into some detail so that it can be recorded within the plan.  If you have any questions, please feel free to email me, or drop by my office.  Kind regards, Andre Alexandrov. | |

Email Template – Team Member 2:

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| **To:** | Chanmonich Phe |
| **From:** | Andre Alexandrov |
| **Date:** | 21/09/2023 |
| **Subject:** | Learning and development plan |
| Hi Chanmonich,  As Discussed in the meeting I have developed an action plan attached to this email to assist your learning and development over the next 2 months.  The plan includes you attending a 1hr learning seminar on the importance of WHS policies and the importance of adhering to the Pre-start equipment check, you will also be given one day a fortnight for a month to follow a team leader or the WHS officer to gain an understanding of the real world implications of not following a Pre-start equipment check.  I would also like you to email me once you have completed the learning session and at the end of the month after shadowing me so that I can understand what you have learnt and the effectiveness of this development plan. I would like for you to go into some detail so that it can be recorded within the plan.  If you have any questions, please feel free to email me, or drop by my office.  Kind regards, Andre Alexandrov. | |

Email Template – Team:

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| **To:** | Chanmonich Phe, Simon Johnson |
| **From:** | Andre Alexandrov |
| **Date:** | 21/09/2023 |
| **Subject:** | Team Learning and development plan |
| Hi Chanmonich, Simon  As Discussed in the meeting I have developed an action plan attached to this email to assist your learning and development over the next 2 months.  The plan includes you attending an open workshop over two days where team members learn how to effectively use collaboration tools, and also are taught how to effectively create schedules that can consider some unforeseen circumstances.  You will also Shadow the team leader on collaborative tasks, use and follow schedules created by the team leader/Assistant manager. Please let me know what dates work best for the both of you.  I would also like you to email me once you have completed the learning session and at the end of the month after shadowing me so that I can understand what you have learnt and the effectiveness of this development plan. I would like for you to go into some detail so that it can be recorded within the plan.  If you guys have any questions, please feel free to email me, or drop by my office.  Kind regards, Andre Alexandrov. | |