# Workplace Assessment Task 3 – Observation Form

*(This form is for the assessor’s use only)*

## **Purpose**

This *Observation Form* lists the practical skills that the candidate must demonstrate/perform while completing **Workplace Assessment Task 3.**

This form is to be completed by the candidate’s assessor to document their observations on the candidate’s performance in Workplace Assessment Task 3.

## **Task Overview**

For this task, the candidate is required to participate in at least two team meetings (e.g., weekly meetings, daily catchups, etc.) while being observed by the assessor.

Agenda items covered in these meetings may vary. However, during each meeting, they must have:

* Clarified task-related instructions with a colleague
* Negotiated timeframes with a colleague
* Raised ideas for improvement in work practices

**Collectively they must have clarified task-related instructions and negotiated timeframes with at least two different colleagues.**

In this task, the candidate will be assessed on their:

* Practical knowledge of communication protocols within their team.
* Practical skills relevant to communicating and negotiating effectively with colleagues.

## **Instructions to the Assessor**

### Before the assessment

* Organise workplace resources required for the candidate to complete this assessment.
* Discuss this assessment task with the candidate, including the practical skills they need to demonstrate during this task and the criteria for satisfactorily demonstrating each skill.
* Review this form with the candidate and address any queries or concerns they may have about it.

### During the assessment

* Observe the candidate as they complete the Workplace Assessment Task.
* For each practical skill listed in this observation form:
  + Tick YES if you confirm you have observed the candidate demonstrate/perform the practical skill.
  + Tick NO if you have not observed the candidate demonstrate/perform the practical skill.
* If you ticked YES, provide the date when you observed the candidate demonstrate the skill.
* Write specific comments on the candidate’s performance in each criterion. Your feedback/insights will help address any area/s for improvement.

### After the assessment

* Complete all parts of the *Observation Form*, including the *Assessor Declaration* on the last page of this form. Your signature must be handwritten.

## **Candidate Details**

|  |  |
| --- | --- |
| Candidate name |  |
| Title/designation |  |

## **Assessor Details**

|  |  |
| --- | --- |
| Candidate is observed and assessed by |  |
| Training Organisation |  |
| Relevant qualifications held |  |

## **Context of the Assessment**

|  |  |  |
| --- | --- | --- |
| Assessment environment | Real workplace | Simulated environment |
| Workplace/organisation |  | |
| Resources required for the assessment | Workplace/organisation or a similar environment  Colleagues (at least two)  Access to team meetings, e.g., weekly meetings, daily catchups, etc.  The organisation’s communication and confidentiality procedures. | |
| The workplace/organisation’s communication policies and procedures |  | |
| The workplace/organisation’s confidentiality policies and procedures |  | |

## **Candidate Assessment Briefing**

|  |  |
| --- | --- |
| Date of assessment briefing |  |

|  |  |
| --- | --- |
| **The assessor confirms:** | **YES/NO** |
| 1. They have discussed with the candidate the workplace task they are required to complete for this assessment. | YES  NO |
| 1. The candidate understands they will be assessed while completing this workplace task, as well as any document(s) they will complete as part of this task. | YES  NO |
| 1. They have discussed with the candidate instructions on how they are to undertake the workplace task. | YES  NO |
| 1. They have provided the candidate guidance on how they can satisfactorily complete the task. | YES  NO |
| 1. They have discussed with the candidate the practical skills (listed below) they are required to demonstrate while completing this task. | YES  NO |
| 1. They have addressed the candidate’s questions or concerns about the workplace task and the assessment process. | YES  NO |

# Observation Form

## **Meeting 1**

|  |  |
| --- | --- |
| Meeting to be attended by the candidate | Assessor to specify, e.g. weekly team meeting, standup meeting, daily catchups, etc. |
| Mode of meeting | Face-to-face  Call conference  Others (please specify): |
| Participants in the meeting | Assessor to specify; indicate their job role or title only |
| Relevant confidentiality procedures |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate clarifies instructions with a colleague.   The assessor to specify instructions discussed during the meeting:  **For a satisfactory performance, this must be a different colleague from Meeting 2** |  |  |  |
| 1. The candidate reiterates the instructions as they have understood them. | YES  NO |  |  |
| 1. The candidate asks the colleague if they have understood the instructions correctly and accurately. | YES  NO |  |  |
| 1. The candidate asks follow-up questions to clarify further points unclear to them. | YES  NO |  |  |
| 1. The candidate records the outcomes of their discussion with the colleague. | YES  NO |  |  |
| 1. The candidate addresses the colleague’s requests appropriately.   The assessor to specify the request made by the client: |  |  |  |
| 1. The candidate takes note of the colleague’s request. | YES  NO |  |  |
| 1. The candidate reiterates the request and confirms with the colleague if they have understood it correctly. | YES  NO |  |  |
| 1. The candidate responds appropriately to the request.   The assessor to specify the response given.  (For a satisfactory performance, there must be at least one ticked)  Answering a work-related enquiry or question  Clarifying or repeating points discussed earlier.  Advising the colleague that they will get back to them on the request after they have gathered more information.  Providing additional information not covered in the meeting.  Forwarding the request or concern to the appropriate person, e.g., the supervisor, as required in the organisation’s policies and procedures  Others (please specify): | YES  NO |  |  |
| 1. The candidate communicates information clearly. |  |  |  |
| 1. The candidate communicates information in an organised and structured manner.   This involves: |  |  |  |
| 1. Starting with an overview or general broad points. | YES  NO |  |  |
| 1. Followed by specific points or examples. | YES  NO |  |  |
| 1. Summarising accordingly by key points. | YES  NO |  |  |
| 1. The candidate speaks slowly (however, not too slow). | YES  NO |  |  |
| 1. The candidate speaks in a well-modulated voice. | YES  NO |  |  |
| 1. The candidate checks in with the meeting attendees to see if they have understood the information discussed. | YES  NO |  |  |
| 1. The candidate follows the organisation’s confidentiality procedures.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |  |
| 1. The candidate avoids sharing private and confidential client information that is irrelevant to the meeting. | YES  NO |  |  |
| 1. The candidate shares private and confidential information when there are no other people in the vicinity who can overhear the discussion.   I.e., the meeting is undertaken in the board room. | YES  NO |  |  |
| 1. The candidate communicates information in a timely manner.   The assessor to specify how this is done.  (For a satisfactory performance, there must be at least one ticked below)  Providing updates from the week (if it is a weekly meeting)  Providing updates for the day (if it is a daily meeting)  Providing updates for the month (if it is a monthly meeting)  Completing action items within the designated timeframes.  Others (please specify): | YES  NO |  |  |
| 1. The candidate openly and constructively discusses areas for improvement in current workplace practices and procedures. |  |  |  |
| 1. The candidate shares the area for improvement they identified in current **workplace practices.**   *Note that workplace practices include activities or processes undertaken.* | YES  NO |  |  |
| 1. The candidate explains the benefits of addressing this area for improvement in these **workplace practices**, including: |  |  |  |
| * 1. The particular organisational need/requirement it will address. | YES  NO |  |  |
| * 1. How it can address a particular organisational need | YES  NO |  |  |
| * 1. How it can help workers | YES  NO |  |  |
| * 1. How it can benefit clients. | YES  NO |  |  |
| 1. The candidate shares the area for improvement they identified in current **workplace procedures.**   *Note that workplace procedures are specific steps for completing a process or a task.* | YES  NO |  |  |
| 1. The candidate explains the benefits of addressing this area for improvement in these workplace procedures, including: |  |  |  |
| 1. The particular organisational need/requirement it will address. | YES  NO |  |  |
| 1. How it can address a particular organisational need | YES  NO |  |  |
| 1. How it can help workers | YES  NO |  |  |
| 1. How it can benefit clients. | YES  NO |  |  |
| 1. The candidate shares their recommendations on how these areas for improvement can be addressed. | YES  NO |  |  |
| 1. The candidate promotes changes and improvements to workplace practices and procedures. |  |  |  |
| 1. The candidate shares changes recently made to **workplace practices.**   *Note that workplace practices include activities or processes undertaken.* | YES  NO |  |  |
| 1. The candidate shares changes recently made to **workplace procedures**.   *Note that workplace procedures are specific steps for completing a process or a task.* | YES  NO |  |  |
| 1. The candidate shares how changes recently made to workplace practices and procedures improved outcomes, e.g., service delivery outcomes. | YES  NO |  |  |
| 1. The candidate demonstrates effective communication throughout the meeting. |  |  |  |
| 1. The candidate uses active listening, including: |  |  |  |
| * 1. Paraphrasing | YES  NO |  |  |
| * 1. Summarising | YES  NO |  |  |
| * 1. Using verbal affirmations such as ‘I understand,’ ‘Alright,’ ‘Got it.’ | YES  NO |  |  |
| 1. The candidate uses effective questioning, including: |  |  |  |
| * 1. Asking yes-no questions | YES  NO |  |  |
| * 1. Asking probing questions | YES  NO |  |  |
| 1. The candidate uses appropriate non-verbal communication to demonstrate respect to their colleagues. |  |  |  |
| 1. The candidate maintains appropriate eye contact with the person talking. | YES  NO |  |  |
| 1. The candidate maintains proper posture (avoiding slouching) | YES  NO |  |  |
| 1. The candidate avoids interrupting other people who are currently talking. | YES  NO |  |  |
| 1. The candidate occasionally nods to acknowledge what their colleague is saying. | YES  NO |  |  |
| 1. The candidate uses workplace/industry terminologies correctly and accurately throughout the meeting.   The assessor to list below terminologies the candidate used correctly and accurately.  (For a satisfactory performance, there must be at least two terminologies listed here) | YES  NO |  |  |

## **Meeting 2**

|  |  |
| --- | --- |
| Meeting to be attended by the candidate | Assessor to specify, e.g. weekly team meeting, standup meeting, daily catchups, etc. |
| Mode of meeting | Face-to-face  Call conference  Others (please specify): |
| Participants in the meeting | Assessor to specify; indicate their job role or title only |
| Relevant confidentiality procedures |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate discusses and negotiates timeframes for carrying out workplace tasks with a colleague.   **For a satisfactory performance, this must be a different colleague from Meeting 1** |  |  |  |
| 1. The candidate listens to timeframes for carrying out workplace tasks. | YES  NO |  |  |
| 1. The candidate reiterates the timeframes discussed with the colleague to confirm that they have understood it correctly. | YES  NO |  |  |
| 1. The candidate politely explains why the timeframes originally proposed do not work for them (e.g., conflict schedule). | YES  NO |  |  |
| 1. The candidate provides a valid reason the original timeframes do not work for them (e.g., prior engagement with a client). | YES  NO |  |  |
| 1. The candidate states timeframes that work for them. | YES  NO |  |  |
| 1. The candidate sorts with the colleague until they are able to establish a timeframe that works for both parties. | YES  NO |  |  |
| 1. The candidate thanks the colleague for adjusting accordingly. | YES  NO |  |  |
| 1. The candidate addresses the colleague’s requests appropriately.   The assessor to specify the request made by the client: |  |  |  |
| 1. The candidate takes note of the colleague’s request. | YES  NO |  |  |
| 1. The candidate reiterates the request and confirms with the colleague if they have understood it correctly. | YES  NO |  |  |
| 1. The candidate responds appropriately to the request.   The assessor to specify the response given.  (For a satisfactory performance, there must be at least one ticked)  Answering a work-related enquiry or question  Clarifying or repeating points discussed earlier.  Advising the colleague that they will get back to them on the request after they have gathered more information.  Providing additional information not covered in the meeting.  Forwarding the request or concern to the appropriate person, e.g., the supervisor, as required in the organisation’s policies and procedures  Others (please specify): | YES  NO |  |  |
| 1. The candidate communicates information clearly. |  |  |  |
| 1. The candidate communicates information in an organised and structured manner.   This involves: |  |  |  |
| 1. Starting with an overview or general broad points. | YES  NO |  |  |
| 1. Followed by specific points or examples. | YES  NO |  |  |
| 1. Summarising accordingly by key points. | YES  NO |  |  |
| 1. The candidate speaks slowly (however, not too slow). | YES  NO |  |  |
| 1. The candidate speaks in a well-modulated voice. | YES  NO |  |  |
| 1. The candidate checks in with the meeting attendees to see if they have understood the information discussed. | YES  NO |  |  |
| 1. The candidate follows the organisation’s confidentiality procedures.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |  |
| 1. The candidate avoids sharing private and confidential client information that is irrelevant to the meeting. | YES  NO |  |  |
| 1. The candidate shares private and confidential information when there are no other people in the vicinity who can overhear the discussion. | YES  NO |  |  |
| 1. The candidate communicates information in a timely manner.   The assessor to specify how this is done.  (For a satisfactory performance, there must be at least one ticked below)  Providing updates from the week (if it is a weekly meeting)  Providing updates for the day (if it is a daily meeting)  Providing updates for the month (if it is a monthly meeting)  Completing action items within the designated timeframes.  Others (please specify): | YES  NO |  |  |
| 1. The candidate openly and constructively discusses areas for improvement in current workplace practices and procedures. |  |  |  |
| 1. The candidate shares the area for improvement they identified in current **workplace practices.**   *Note that workplace practices include activities or processes undertaken.* | YES  NO |  |  |
| 1. The candidate explains the benefits of addressing this area for improvement in these **workplace practices**, including: |  |  |  |
| * 1. The particular organisational need/requirement it will address. | YES  NO |  |  |
| * 1. How it can address a particular organisational need | YES  NO |  |  |
| * 1. How it can help workers | YES  NO |  |  |
| * 1. How it can benefit clients. | YES  NO |  |  |
| 1. The candidate shares the area for improvement they identified in current **workplace procedures.**   *Note that workplace procedures are specific steps for completing a process or a task.* | YES  NO |  |  |
| 1. The candidate explains the benefits of addressing this area for improvement in these workplace procedures, including: |  |  |  |
| 1. The particular organisational need/requirement it will address. | YES  NO |  |  |
| 1. How it can address a particular organisational need | YES  NO |  |  |
| 1. How it can help workers | YES  NO |  |  |
| 1. How it can benefit clients. | YES  NO |  |  |
| 1. The candidate shares their recommendations on how these areas for improvement can be addressed. | YES  NO |  |  |
| 1. The candidate promotes changes and improvements to workplace practices and procedures. |  |  |  |
| 1. The candidate shares changes recently made to **workplace practices.**   *Note that workplace practices include activities or processes undertaken.* | YES  NO |  |  |
| 1. The candidate shares changes recently made to **workplace procedures**.   *Note that workplace procedures are specific steps for completing a process or a task.* | YES  NO |  |  |
| 1. The candidate shares how changes recently made to workplace practices and procedures improved outcomes, e.g., service delivery outcomes. | YES  NO |  |  |
| 1. The candidate demonstrates effective communication throughout the meeting. |  |  |  |
| 1. The candidate uses active listening, including: |  |  |  |
| * 1. Paraphrasing | YES  NO |  |  |
| * 1. Summarising | YES  NO |  |  |
| * 1. Using verbal affirmations such as ‘I understand,’ ‘Alright,’ ‘Got it.’ | YES  NO |  |  |
| 1. The candidate uses effective questioning, including: |  |  |  |
| * 1. Asking yes-no questions | YES  NO |  |  |
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| 1. The candidate uses appropriate non-verbal communication to demonstrate respect to their colleagues. |  |  |  |
| 1. The candidate maintains appropriate eye contact with the person talking. | YES  NO |  |  |
| 1. The candidate maintains proper posture (avoiding slouching) | YES  NO |  |  |
| 1. The candidate avoids interrupting other people who are currently talking. | YES  NO |  |  |
| 1. The candidate occasionally nods to acknowledge what their colleague is saying. | YES  NO |  |  |
| 1. The candidate uses workplace/industry terminologies correctly and accurately throughout the meeting.   The assessor to list below terminologies the candidate used correctly and accurately.  (For a satisfactory performance, there must be at least two terminologies listed here) | YES  NO |  |  |

|  |  |
| --- | --- |
| **Assessor Declaration**  By signing here, I confirm that I have observed the candidate whose name appears above participate in a team meeting (e.g., weekly meeting, daily catchups, etc.).  I confirm that the information recorded on this *Observation Form* is true and accurately reflects the candidate’s performance during their completion of the workplace task. | |
| Assessor’s signature |  |
| Assessor’s name |  |
| Date signed |  |

End of Workplace Assessment – Observation Form