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| TAEASS402 Assess competence (Release 2) ASSESSMENT WORKBOOK | | | | | | |
| ✍ Student to complete this section | | | | | | |
| Name | | | | Telephone | | |
|  | | | |  | | |
| Email address | | | Postal address | | | |
|  | | |  | | | |
| Course type: | | Class or workshop  Webinar / distance learning  Other – describe: | | | | |
| Course location: | |  | | | | |
| Course date: | |  | | | | |
| Trainer name: | |  | | | | |
| Last submission: | | (Check this box if you believe this is the final workbook submission for the award of your qualification.) | | | | |
| Checklist: | | I have completed and signed this cover page  I have answered all questions  I have submitted the statutory declaration form PT-STATDEC (refer to section 1.11) | | | | |
| Candidate declaration  *I declare that I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time. This workplace project is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of a qualification or statement of attainment.*  *I acknowledge that all extrinsic evidence provided (such as third-party reports, previously developed work, etc.) in support of my assessment submission may be verified by Plenty Training for authenticity prior to a final result being recorded. By submitting any such extrinsic evidence I authorise you to contact the relevant organisations and individuals for the purpose of authenticating this extrinsic evidence.* | | | | | | |
| Signature: |  | | | | Date: |  |

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| --- | --- | --- | --- | --- | --- | --- |
| OFFICE USE ONLY | | | | | | |
| Submission no. | Enrolled / paid date | Date received | | Date student provided feedback | Last workbook? | Admin initials |
|  |  |  | |  |  |  |
|  |  |  | |  |  |  |
| Executed statutory declaration form PT-STATDEC on file?  Yes  No🡪Do not assess until received | | | | | | |
| UNIT TASK RESULTS | | | RECORD OF ASSESSMENT OUTCOME | | | |
| Task 1. Written questions  S  NS  Task 2. Portfolio of Documents &  S  NS  Observation  Task 3. Portfolio of Documents  S  NS | | | Competent  Not Competent  Assessor declaration: *I declare that I have conducted a fair and valid assessment and have provided feedback to the candidate.*  Assessor name:  Assessor signature:  Date: | | | |
| Notes: | | | | | | |

|  |  |  |
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# 

# Introduction

|  |
| --- |
| IMPORTANT NOTE 1  It is recommended that you complete unit TAEASS401 Plan assessment activities and processes before undertaking this unit as it provides foundational knowledge on assessment processes.  IMPORTANT NOTE 2  Students who have completed these assessment tasks using the previous version of this workbook (i.e., Rev. 13) are not compelled to use this current Rev. 14 version of the workbook and may submit the superseded Rev. 13 workbook provided they submit this before 1 November 2022. |

## Purpose

This document represents the main assessment instrument for the unit of competency TAEASS402 Assess competence. This unit describes the skills and knowledge required to implement an assessment plan and gather quality evidence to assess the competence of a candidate using compliant assessment tools. It applies to teachers, trainers and assessors in enterprises and registered training organisations (RTOs) and those providing assessment advisory services.

## Terms used

The following terms are used in each assessment task to guide the candidate and assessor as to what is expected from each assessment task:

* Instructions: Provides a brief description about the assessment task and broadly indicates what the Candidate is required to do.
* Context: Outlines the conditions in which the assessment must be undertaken. In some cases, it will give options for the candidate about what to base the assessment task on.
* Decision-making rules: Advises the candidate and the assessor of the criteria that the assessment must meet for a satisfactory result to be awarded.

## Completing the assessments

Assessors must ensure that candidates completely understand the assessment process and various assessment tasks before undertaking the assessments. This assessment tool is structured in a way that each assessment task clearly outlines the:

* Instructions for completing the assessment task,
* Context in which the assessment must be conducted,
* Evidence that must be presented by the candidate, and
* Decision-making rules by which the evidence will be judged.

## Assessment

Each assessment task has a section for the assessor recording the assessment outcome as either ‘Satisfactory’ (S) or ‘Not Satisfactory’ (NS). Once the candidate satisfactorily completes all assessment tasks, the assessor will complete the record of assessment outcome and record either a “Competent” (C) or “Not Competent” (NC) outcome. When awarding any assessment result, assessors must ensure that feedback for the candidate is recorded in the spaces provided after each assessment task and on the record of assessment outcome.

If an assessment result is unsatisfactory, you will be notified of the issue and afforded up to two opportunities to resubmit evidence for the specific task deemed not satisfactory. Your resubmission must be within the enrolment period for this course.

## Summary of assessment methods and tasks

The assessment methods that are used in this assessment tool are:

|  |  |  |
| --- | --- | --- |
| **Assessment Task #** | **Method of Assessment** | **Description** |
| 1 | Written Questions | Candidates must answer a number of short answer questions related to this unit. |
| 2 | Portfolio of documents and Observation | Candidates must conduct five assessments with different candidates, make assessment decisions, and submit completed records of assessment |
| 3 | Portfolio of documents | Candidates must gather candidate feedback and reflect on the assessments conducted to identify areas for improvement |

Note: Assessment Tasks 2 and 3 are related to one another. Candidates should read the instructions to all three of these assessment tasks before commencing any one of them.

## Required resources

Each assessment task in this assessment tool outlines specific resources that the candidate must have access to as part of the assessment process. Where students are completing this via our *iClass+* pathway they will be using the Adobe Connect platform. Students are required to have access to reliable internet, a computer, webcam with microphone and headset or earbuds to participate live in the assessment tasks. Assessors must ensure that candidates have appropriate access to these resources before any assessment is conducted.

## Reasonable adjustment

Some of the assessment tasks in this assessment tool must be completed in real workplace or independent learning environment. Where indicated, candidates may opt for any of these approaches without disadvantage. All other reasonable adjustments must be approved by the RTO manager.

## Assessment deadlines

This assessment workbook should be submitted within your enrolment period (please refer to your Learner Portal for exact dates). An extension may be possible but is subject to an additional fee. (Refer to the website for a current list of all fees.)

## No return of workbook!

We are required to retain a copy of your assessment workbook and all other evidentiary records. Please ensure you retain a copy of all evidence submitted for your own records.

## Getting started

You may complete this document either electronically (using Microsoft Word) or by writing your answers in the designated areas.

## Statutory declaration

You must provide an executed statutory declaration attesting to the authenticity of your submitted work. Plenty Training cannot assess any submitted work until a properly executed declaration is received. Only one statutory declaration need be submitted which will cover all of your submitted workbooks and evidence. A copy of this form is available in your learner portal.

## Assessment submissions and contact details

You must submit this completed assessment workbook in accordance with the submission instructions located within your online learner portal.

Please feel free to contact us if you have any questions regarding the assessment process:

* Phone: 1800 786 651
* Email: [assessments@plentytraining.edu.au](mailto:assessments@plentytraining.edu.au)

1.13 Academic assistance

Should you have any questions relating to completing the actual assessment tasks in the workbook or require any academic assistance please contact our support team by email: [support@plenty.edu.au](mailto:support@plenty.edu.au).

Should you wish to appeal an assessment decision please see the guidance located in your [Student Guide](https://www.plentytraining.edu.au/student-guide/) on our website

# Assessment task 1 – Short-answer questions

## Instructions

This assessment task requires you to answer a series of questions related to this topic.

### Decision-making rules

To achieve a satisfactory result, you must answer all questions correctly, and the answers must include the number of examples stated in the question. Answers should generally be of one-to-two sentences in length at minimum. Single-word answers are unacceptable.

### Context of assessment

This assessment task may be completed in a classroom, workplace or independent learning environment. Submissions must be made in written form unless reasonable adjustments are approved by the RTO manager. Submissions may be hand written or in soft copy.

## Questions

| **#** | **Question** | | **Answer** | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | A. List and define the four principles of assessment and, for each, provide an example of a non-compliance.  Note: The first has been completed for you. | | **Principle** | | **Description** | | | | | | | **Example of non-compliance** | |
| Valid | | Assessment must relate to the criteria it claims to assess. | | | | | | | Assessment that over assesses or under assesses | |
|  | |  | | | | | | |  | |
|  | |  | | | | | | |  | |
|  | |  | | | | | | |  | |
| B. Explain how the principles of assessment underpin assessment processes | |  | | | | | | | | | | |
| 2 | A. List and define the four rules of evidence and, for each, provide an example of a non-compliance.  Note: The first has been completed for you. | | **Rule name** | | **Description** | | | | | | | **Example of non-compliance** | |
| Authentic | | Authentic evidence is evidence that is the candidate’s own work | | | | | | | Cheating, plagiarism | |
|  | |  | | | | | | |  | |
|  | |  | | | | | | |  | |
|  | |  | | | | | | |  | |
| B. Explain how the four rules of evidence guide the assessment process | |  | | | | | | | | | | |
| 3 | A. Provide four examples of evidence that could be used in competency-based assessment | |  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
| B. Provide four examples of evidence that could be used in a Recognition of Prior Learning (RPL) assessment | |  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
| 4 | VET is a competency-based system. Explain what this means in terms of the following: | | | | | | | | | | | | |
| A. How do units of competency form the basis of VET sector training and assessment? | |  | | | | | | | | | | |
| B. Criterion vs norm-referenced assessment: | |  | | | | | | | | | | |
| C. How are unit assessment results expressed? | | Pass or Fail  Competent or Not Competent  Satisfactory or Not Satisfactory | | | | | | | | | | |
| D. How are evidence assessment results expressed? | | Satisfactory or Not Satisfactory’  Pass or Fail  Competent or Not Competent | | | | | | | | | | |
| 5 | A. Describe what Recognition of Prior Learning (‘RPL’) is. | |  | | | | | | | | | | |
| B. Provide four examples of different purposes of assessment. For example: To determine a person’s level of competency relating to a particular task | |  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | |
| C. Describe the different contexts in which assessment can take place. For example: Simulated. | | **Context type** | | | | **Description or example of what this means** | | | | | | |
| Simulated | | | | Candidate undertakes work in a simulated workplace scenario | | | | | | |
| Work-based | | | |  | | | | | | |
| Classroom-based | | | |  | | | | | | |
| 6 | Describe the purpose of each of the following assessment methods and provide one example of evidence that could be obtained from each. | | | | | | | | | | | | |
| **Method** | | **Purpose / evidence type** | | | | | | | **Example** | | | |
| Observation | | For example: Used to record observations of assessment tasks where a particular criteria is skills based | | | | | | | For example: A unit requirement to apply safe manual handling techniques. | | | |
| Questioning | |  | | | | | | |  | | | |
| Portfolio of Documents | |  | | | | | | |  | | | |
| Production of an Item | |  | | | | | | |  | | | |
| Third party report | |  | | | | | | |  | | | |
| 7 | For each scenario provided below, which assessment method/s would you choose and why? Relate your answers to resource requirements, costs and being suitable for the unit | | | | | | | | | | | | |
| **Scenario** | | | **Assessment method/s** | | | | **Reason why that method was chosen** | | | | | |
| CPR needing to be performed on child and adult manikins (HLTAID009) | | | Observation | | | | Because candidates will need access to resources (mannikin) which most students will not have at home to be videoed and requires assessor to confirm actions such as pressure, angle of head tilt would best suit observation in person | | | | | |
| Required to conduct assessment on 5 candidates under supervision of a qualified assessor (TAEASS402) | | |  | | | |  | | | | | |
| A group of remotely located students who need to deliver sales presentations (BSBCMM411) | | |  | | | |  | | | | | |
| 8 | Describe the following potential barriers to evidence-gathering procedures and processes and how these could be overcome. | | | | | | | | | | | | |
| **Potential barrier** | | **Description or example** | | | | | | | | **How to overcome** | | |
| Organisational culture relating to assessment | |  | | | | | | | |  | | |
| Logistical issues | |  | | | | | | | |  | | |
| 9 | A. Explain the concept of reasonable adjustment. | |  | | | | | | | | | | |
| B. Provide an example of when reasonable adjustment might be required or appropriate and what that adjustment could be. | |  | | | | | | | | | | |
| 10A | Describe each of the following requirements from the Standards for RTOs 2015 and, for each, describe how an RTO could ensure they comply with these in their policies and procedures. | | | | | | | | | | | | |
| **Requirement** | | **Requirement description** | | | | | | **Example** | | | | |
| A. Clause 1.8: ‘Currency’ as it relates to RPL evidence (refer to Table 1.8-2): Describe the issues relating to current RPL evidence. | |  | | | | | |  | | | | |
| B. Clause 1.12: RPL | |  | | | | | |  | | | | |
| C. Clause 1.13: Assessment is delivered only by suitably experienced persons | |  | | | | | |  | | | | |
| D. Clause 1.15: Minimum assessor qualifications | |  | | | | | |  | | | | |
| E. Clause 1.16: Professional development | |  | | | | | |  | | | | |
| F. Clause 6.2: Appeals policy and procedures | |  | | | | | |  | | | | |
| 10B | Describe each of the following content items of a training and assessment strategy (TAS) as recommended by ASQA in their User’s Guide of the Standards for RTOs 2015 | | | | | | | | | | | | |
| **Item** | | **Description** | | | | | | | | | | |
| 1 | Training product | Ensure that you clearly identify the training product the strategy relates to. Include the code and full title to ensure this is clear. | | | | | | | | | | |
| 2 | Core and elective components (full qualifications) |  | | | | | | | | | | |
| 3 | Target group |  | | | | | | | | | | |
| 4 | Mode of delivery |  | | | | | | | | | | |
| 5 | Entry Requirements |  | | | | | | | | | | |
| 6 | Duration and scheduling |  | | | | | | | | | | |
| 7 | Assessment resources, methods and timing |  | | | | | | | | | | |
| 8 | Learning resources |  | | | | | | | | | | |
| 9 | Human resources |  | | | | | | | | | | |
| 10 | Physical resources |  | | | | | | | | | | |
| 11 | Answer the following questions relating to how competency standards form the basis of qualifications in the VET sector. | | | | | | | | | | | | |
| A. What is a training package? | |  | | | | | | | | | | |
| B. What is a qualification? | |  | | | | | | | | | | |
| C. What are packaging rules? | |  | | | | | | | | | | |
| D. What is a unit of competency? | |  | | | | | | | | | | |
| E. What is a core unit of competency? | |  | | | | | | | | | | |
| F. What is an elective unit of competency? | |  | | | | | | | | | | |
| 12 | Give an example of how you would accommodate the following cultural and equity considerations when organising or conducting assessment. | | | | | | | | | | | | |
| A. Learners with language and literacy difficulty | |  | | | | | | | | | | |
| B. Cultural norms | |  | | | | | | | | | | |
| C. People with physical disabilities | |  | | | | | | | | | | |
| D. Conflict of interest | |  | | | | | | | | | | |
| 13 | In what way does each of the following Workplace Health and Safety issues impact on assessment practices? Provide one example for each point. | | | | | | | | | | | | |
| A. Hazard identification and risk control measures | |  | | | | | | | | | | |
| B. Requirements for reporting hazards and incidents | |  | | | | | | | | | | |
| C. Emergency procedures | |  | | | | | | | | | | |
| D. Procedures for use of relevant personal protective equipment | |  | | | | | | | | | | |
| E. Safe use of relevant equipment | |  | | | | | | | | | | |
| F. Sources of WHS information – name two sources. | |  | | | | | | | | | | |
|  | | | | | | | | | | |
| 14 | Explain how the following standards and regulatory requirements impact on the assessment process in the vocational education and training sector as an assessor. | | | | | | | | | | | | |
| A. Copyright | |  | | | | | | | | | | |
| B. Privacy and security of information | |  | | | | | | | | | | |
| C. Plagiarism | |  | | | | | | | | | | |
| D. Training packages and competency standards | |  | | | | | | | | | | |
| E. Licensing requirements (e.g., unit CPCCWHS1001) | |  | | | | | | | | | | |
| F. Anti-discrimination, including equal employment opportunity, racial vilification and disability discrimination | |  | | | | | | | | | | |
| G. Industrial awards, enterprise agreements and workplace relations | |  | | | | | | | | | | |
| 15 | Answer the following questions relating to the structure and application of competency standards. | | | | | | | | | | | | |
| A. List the packaging rules for TAE40116, being sure to list all core units. (Do not list all elective units.) | |  | | | | | | | | | | |
| B. List the entry prerequisites for TAE40116? | |  | | | | | | | | | | |
| C. Describe each of these unit components and whether they must be assessed | | Unit component name | | | Description | | | | | | | Need to be assessed? |
| Element | | |  | | | | | | |  |
| Performance criterion | | |  | | | | | | |  |
| Foundation skills | | |  | | | | | | |  |
| Knowledge Evidence | | |  | | | | | | |  |
| Performance Evidence | | |  | | | | | | |  |
| 16 | What is the difference between an assessment tool and an assessment instrument? | |  | | | | | | | | | | |
| 17 | Describe what you must report to each of the following parties after making an assessment decision. | | | | | | | | | | | | |
| A. Assessment candidate | |  | | | | | | | | | | |
| B. Internal administrative staff | |  | | | | | | | | | | |
| C. Other relevant parties | |  | | | | | | | | | | |
| 18 | Provide an example of non-compliance for each of the following requirements when recording and reporting assessment outcomes | | | | | | | | | | | | |
| A. Assessment system / organisational requirements | |  | | | | | | | | | | |
| B. Legal requirements | |  | | | | | | | | | | |
| C. Ethical requirements | |  | | | | | | | | | | |

## Assessor’s marking checklist for assessment task 1

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Instructions to assessors: This checklist is used to record your evaluation of the candidate’s evidence provided in Task 1.  When completing this checklist you must ensure that:   * Each checklist item is assessed against the criteria listed. * An assessment result of ‘Yes’ or ‘No’ is recorded on the right of the checklist. * Feedback is provided to the student. * The candidate is advised of the assessment result. | | | | | |
| **Checklist item:** Candidates must answer all questions correctly: | | | | **Result** |
| Question 1 | | | | Yes  No |
| Question 2 | | | | Yes  No |
| Question 3 | | | | Yes  No |
| Question 4 | | | | Yes  No |
| Question 5 | | | | Yes  No |
| Question 6 | | | | Yes  No |
| Question 7 | | | | Yes  No |
| Question 8 | | | | Yes  No |
| Question 9 | | | | Yes  No |
| Question 10 | | | | Yes  No |
| Question 11 | | | | Yes  No |
| Question 12 | | | | Yes  No |
| Question 13 | | | | Yes  No |
| Question 14 | | | | Yes  No |
| Question 15 | | | | Yes  No |
| Question 16 | | | | Yes  No |
| Question 17 | | | | Yes  No |
| Question 18 | | | | Yes  No |
| Assessment task result | | Is a reassessment or resubmission required? | | | |
| Satisfactory  Not Satisfactory | | Yes  No | | | |
| Resubmission notes | | | | | |
| Feedback | | | | | |
| Assessor name | Assessor signature | | Date | | |

# Assessment task 2 – Conduct assessment

## Instructions

In this assessment task you must conduct five independent assessments under supervision of a qualified assessor:

* Each assessment must be for a different learner.
* Each assessment must be against at least one unit of competency and the unit must be completely assessed.
* At least one of these assessments must be a recognition of prior learning (RPL) assessment.

A qualified assessor must supervise you while you undertake the five assessments and must complete the observation checklist.

**Options for students to complete this assessment task:**

You may either:

* Attend a live online one-day workshop provided by Plenty Training in which you may undertake these assessment activities under the supervision of your class trainer. You will use the units and assessment tools provided in sections 3.3 through 3.7. These workshops are held in the Adobe Connect platform – you will require a reliable internet connection, a computer that can download Adobe Connect (you do not need to purchase this), a webcam, microphone, and headset/earbuds to participate. These workshops are regularly scheduled but are subject to class availability. Information on registering and dates are in your Learner Portal. We recommend you do not book in for this until you are about two thirds of the way through your course to ensure you are ready and suitably prepared to complete it. You are required to have completed unit TAEASS401 and have watched the recorded lessons for TAEASS402 before attending. (Your attendance at this workshop is included in your course fee.) OR
* Undertake these assessment activities independently or in a workplace, subject to the following:
* You must have access to someone who possesses:
* The TAE50111 Diploma of Vocational Education and Training; or
* The TAE50116 Diploma of Vocational Education and Training; or
* The TAE50211 Diploma of Training Design and Development; or
* The TAE50216 Diploma of Training Design and Development; or
* A higher-level qualification in adult education;

and can supervises you undertaking these assessment activities. They must complete the checklist in section 3.9 and the statutory declaration in section 3.10.

* You must have access to at least five real candidates within the vocational education and training (VET) context who are willing for you to undertake these assessments on.
* You may elect to use your own units of competency and your own compliant assessment tools or else use the units and assessment tools provided in sections 3.3 through 3.7.

**During the assessments you must:**

1. Select an assessment plan, tools and instruments that use different assessment methods / instruments involving a range of activities and events, which address at least one complete unit of competence, and which meet all applicable organisational, legal, and ethical requirements for conducting the assessment. Read and understand the unit content and the necessary evidentiary requirements. Suitable plans and assessment tools are included in sections 3.3 through 3.7 and in the Appendices at the rear of this workbook.

2. Determine the need and, if necessary, arrange for learner support (such as interpreters, distance assessment, etc.), and all material and physical resource requirements, during the assessment process.

3. Explain, discuss, and agree on the details of the planned assessment process with the candidate. For RPL assessment, explain to the learner the types of evidence that can be submitted.

4. Consult with the candidate to identify opportunities for evidence-gathering in actual or simulated activities, and then use the assessment tools to conduct the assessment and gather evidence.

5. Integrate assessment tasks where possible and document any changes or mark-ups to the assessment instrument where necessary.

6. Use appropriate communication skills with the learner – such as using two-way communication and feedback with the candidate, using effective questioning, and clarifying, as required – and maintain a professional relationship.

7. Undertake the assessments being sure to apply the Principles of Assessment and the Rules of Evidence to gather evidence in a format suitable for determining competence.

8. You must demonstrate that you can make reasonable adjustments to a learner and unit of competency with at least one candidate.

9. If risks to safety arise you must immediately address them.

10. Provide feedback to the learner at appropriate points in the assessment process and discuss the assessment outcome.

11. Record the details of the five assessment events in section 3.2 below and record your final assessment decision using the five assessment record forms in sections 3.3 through 3.7.

12. Submit all completed assessment tools, evidence, and assessment summary reports.

### Decision-making rules

To achieve a satisfactory result, you must conduct five assessments in line with each of the points listed in the instructions above, and one of these assessments must be an RPL assessment. Additionally, your trainer will be looking for your ability to:

* Communicate information and assessment process requirements clearly, using techniques appropriate to the audience and environment. This includes using appropriate pitch, tone and speed in your communication.
* Interact with your candidates to build rapport and understanding and obtain specific information to support the assessment process. You must demonstrate at least two of the following rapport-building techniques:
* Initial small talk: Use non-threatening and ‘safe topics’ for initial small talk. Talk about established shared experiences, the weather, how you travelled to where you are. Avoid talking too much about yourself and avoid asking direct questions about the other person.
* Shared experiences: Listen to what the other person is saying and look for shared experiences or circumstances – this will give you more to talk about in the initial stages of communication.
* Humour: Inject an element of humour. Laughing together creates harmony, make a joke about yourself or the situation/circumstances you are in but avoid making jokes about other people.
* Non-verbal signals: Use effective body language and other non-verbal signals. Maintain eye contact for approximately 60% of the time and relax and lean slightly towards them to indicate listening, mirror their body-language if appropriate.
* Show empathy. Demonstrate that you can see the other person’s point of view.
* Adjust your personal communication style according to the type, values, and experiences of others to build rapport. This includes identifying the communication style of your audience and adjusting it per:
* Controller: Controllers want only facts, are goal oriented and their major motivation is to get things done. Adjust your communication style by getting to the point quickly. Give them the broad outline, not the details. Anticipate objections and be ready to solve problems on the spot.
* Innovator: The Innovator is enthusiastic, curious, and expressive and values personal relationships, acceptance, and prestige, and focus on the big picture. Allow plenty of time for talk and socialising. Illustrate your points with stories and personal experiences. Focus on the big picture, the creative possibilities.
* Thinker: The opposite of the Controller, the Thinker wants all the details. Thinkers are technical and systematic, valuing logic and diligence. Their communication will focus on facts and details. Provide them with lots of lists, charts, graphs.
* Supporter: The Supporter style typically has a calm, cool and collected personality. They want to avoid conflict at all costs and do not like change. They may tend to get emotional when trying to reach a decision. Spend time establishing a rapport. Share personal details and find things you have in common.
* Cooperate and collaborate with others and contribute to activities requiring joint responsibility and accountability – including at least two of the following techniques:
* Look for common ground: Find shared values, consider shared personal experiences, pay attention to, and give feedback, be yourself and expect the same of others, be willing to accept differences in perceptions and opinions.
* Learn about others: Consider their perspectives and needs, appeal to the highest motives, let others express themselves freely.
* Critique results, not people: Do not waste time on personal hostility, make other people feel good, avoid criticism, and put downs.
* Give and get respect: Show respect for others' opinions, be considerate and friendly, put yourself in the other person's shoes, be responsive to emotions, speak with confidence but remain tactful.
* Proceed slowly: Present one idea at a time, check for understanding and acceptance of each idea before moving on to the next. Speak in an organized and logical sequence.
* Be explicit and clear: Share your ideas and feelings, pay attention to nonverbal communication, speak clearly, and make eye contact, select words that have meaning for your listeners.
* Develop a professional relationship with your candidate that reflects sensitivity to individual differences and use two-way feedback.

### Context of assessment

Your competence must be demonstrated in a real assessment environment with real candidates within the vocational education and training (VET) context.

## Assessment summary

Record the details of the five assessments you conducted.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Assessment** | | | | |
| **1** | **2** | **3** | **4** | **5** |
| 1 | Briefing / assessment date |  |  |  |  |  |
| 2 | Candidate name |  |  |  |  |  |
| 3 | Location of assessment |  |  |  |  |  |
| 4 | Unit of competency assessed |  |  |  |  |  |
| 5 | Name of witnessing qualified assessor |  |  |  |  |  |
| 6 | Did you use the plans and tools in sections 3.3 through 3.7 or your own? If the latter, attach the completed assessment tool & evidence | Plans and tools in sections 3.3 were used  My own tools were used and are attached | Plans and tools in section 3.4 were used  My own tools were used and are attached | Plans and tools in section 3.5 were used  My own tools were used and are attached | Plans and tools in section 3.6 were used  My own tools were used and are attached | Plans and tools in section 3.7 were used  My own tools were used and are attached |
| 7 | Your assessment decision / result | Competent  Not competent | Competent  Not competent | Competent  Not competent | Competent  Not competent | Competent  Not competent |
| 8 | Was this an RPL assessment? (At least one must be selected.) | Yes  No | Yes  No | Yes  No | Yes  No | Yes  No |
| 9 | Reasonable adjustment considerations required? (At least one must be selected.) | Yes  No | Yes  No | Yes  No | Yes  No | Yes  No |
| 10 | Summarise the reasonable adjustments you made |  | | | | |
| 11 | How do you know that these were real candidates within the VET context? |  | | | | |

## 

## BSBPEF202 Assessment candidate # 1

|  |  |
| --- | --- |
| **ASSESSMENT PLAN** | |
| A. Candidate name |  |
| B. Unit to be assessed | BSBPEF202 Plan and apply time management |
| C. Assessment date – planned |  |
| D. Assessment date – actual |  |
| E. Assessment location |  |
| F. Candidate description |  |
| G. Reasonable adjustments needed |  |
| H. Materials, resources or other documents needed for assessment |  |
| I. Special support arrangements for assessment |  |
| J. Timeline for assessment, how long and how often? |  |

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| --- | --- | --- | --- |
| **ASSESSMENT RESULTS**  (Complete this section after the assessments have concluded.) | | | |
| A. Task results | Assessment task | | Result |
| Assessment instrument # 1: Production of an item checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 2: Observation checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 3: Questioning Instrument | | Satisfactory  Not Satisfactory |
| B. Final assessment result | Competent  Not Competent | | |
| C. Feedback to student |  | | |
| D. Student Declaration | | D. Assessor Declaration | |
| I declare this assessment is my own work and have provided references where appropriate.  Signature: | | I declare that I have conducted a fair and valid assessment and the student has been provided with feedback.  Signature: | |

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| **BSBPEF202 Assessment Instrument 1 – Production of an item** | | | |
| Assessment name | | Task 1 – Produce an item - Time management plan | |
| Unit of competency | | BSBPEF202 Plan and apply time management | |
| Assessment context | | Workplace or simulated workplace | |
| Candidate name | |  | |
| Date of assessment | |  | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of Task(s)**  Candidates are required to develop one time management plan regarding their current work role. The candidate will use a time management plan template provided (in Appendix 1 of this workbook). The time management template contains all the steps that the candidate needs to complete:  In the time management plan the candidate must select a minimum of 5 job tasks that need to be completed as part of their role and document these in the plan template.  An example of a work role, goal planning and job tasks could be: (note example included at end of these instructions - candidate can choose their own job tasks if available): Jobs: emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls etc. Job prioritizing - Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day.   * The candidate must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * They should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * The candidates work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g. Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, the candidate will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. They will then use this plan to monitor and keep track of their progress and any adjustments they need to make.  **Duration:** They have 3 weeks from the date of handout to complete the time management plan. Make sure they write down when the assessment is due and check in with you as the assessor.  **Reasonable Adjustment:** During the demonstration of tasks, they can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment. If the candidate does not have a current workplace a simulated workplace and scenario may be used. The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario**: **Assessor may adjust this scenario as per learners needs.**  They are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. They have been doing this for approximately 9 months. They have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by their supervisor, completing assessment tasks for their study, watching recordings and lessons for their study, updating students records for calls made and assessments completed.  They will use the time management template attached in this assessment to complete prioritizing their job tasks.  They must also use a digital tool such as a calendar or diary on either a computer or phone to help them with this.  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment | |
| Instructions to candidate | | **Explanation of Task(s)**  You are required to develop one time management plan regarding your current work role. If you do not have a current work role your assessor will give you a scenario to help you complete the plan template.  You will use a time management plan template provided to you (located in Appendix 1 of this workbook). The time management template contains all the steps that you need to complete:  You must select a minimum of 5 job tasks that need to be completed as part of your role and document these in the plan template  Some examples of a work role, goal planning and job tasks could be: (note example only- you can choose your own job tasks if available)  Example: Job prioritizing- Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day. E.g. emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls, printing etc   * You must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * You should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * Your work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g., Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, you will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. You will then use this plan to monitor and keep track of your progress and any adjustments you may need to make.  **Duration:** You will be given 3 weeks from the date of handout to complete the time management plan. Make sure you write down when the assessment is due, check with your assessor.  **Reasonable Adjustment:** During the demonstration of tasks, you can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment.  If you do not have a current workplace a simulated workplace and scenario may be used.  The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario: To be used if you do not have a workplace**  You are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. You have been doing this for approximately 9 months. You have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by your supervisor, completing assessment tasks for your study, watching recordings and lessons for your study, updating students records for calls made and assessments completed.  You will use the time management template attached in this assessment to complete prioritizing your job tasks. You must also use a digital tool such as a calendar or diary on either a computer or phone to help you with this. | |
| Evidence required and decision-making rules | | The item must be provided in an electronic format (this can be saved as the Word document or printed, completed by hand and a scan or photo of this submitted). The item (the plan) must meet all the criteria as listed below. | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Production of an item checklist (Does the candidate’s plan meet the following…) | | Result (S/NS) |
| PC1.1 (part) | Clearly identify work role and goal | |  |
| PC1.4 (part) | Clearly outline tasks to be completed (minimum of 5 tasks must be covered) | |  |
| (PC1.4) part, FS4 | Each task has a clear timeframe to be completed by | |  |
| PC1.1 (part), PE1 | Discusses and agrees on this plan with a relevant person | |  |
| PC2.1, FS1, FS2, FS5 | This document is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor | |  |
| PC1.4, FS6.1 | Explains those task/s that are a priority and why | |  |
| KE3, FS5 | Identifies relevant organisational policies and procedures to own work role | |  |
| PE2 (part), FS7 | Includes an outline of at least one digital tool that will be used and explains how this would be beneficial | |  |
| PC2.3, KE1, KE5, FS6.2 | Identifies at least one potential problem that may arise and indicates how this will be managed | |  |
| PC3.1, PE3 | Indicates who you will seek feedback from and when | |  |
| PC3.2, PE2 | Contains a clear indication of those tasks completed when submitted and records any changes made | |  |
| Assessment result | | Satisfactory  Not Satisfactory | |
| Resubmission required? | | Yes  No | |
| Resubmission notes | |  | |
| Feedback to candidate | |  | |
| Assessor name | |  | |
| Assessor signature | |  | |
| Candidate signature | |  | |

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| --- | --- | --- | --- | --- |
| **BSBPEF202 Assessment Instrument 2 – Observation** | | | | |
| Assessment name | | Task 2 - Observation and discussion on Task 1 (time management plan) | | |
| Unit of competency | | BSBPEF202 Plan and apply time management | | |
| Assessment context | | Workplace or simulated workplace | | |
| Candidate name | |  | | |
| Date of assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of tasks:**  You will ask them the following questions in relation to their submitted time management plan (Task 1) plan (note questions can be re-phrased if needed).   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed times and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions you are looking for them to demonstrate the following skills and knowledge:   * Show they understand how their work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected their work plan (if applicable) * Be able to communicate their progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on their plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure they also ask you questions and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (for example be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood)   **Duration:** This task should take approximately 15 minutes to complete  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment. | | |
| Instructions to candidate | | **Explanation of tasks:**  You assessor will ask you some questions in relation to your plan you have submitted and how you feel you went with this task.   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed timeframes and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions they are looking that you can demonstrate the following skills and knowledge:   * Show you understand how your work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected your work plan (if applicable) * Be able to communicate your progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on your plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure you also ask questions of the assessor and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (you should be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | | |
| Evidence required and decision-making rules | | To be satisfactory they must demonstrate each of the skills and knowledge to the level indicated in the checklist below at least once during this task | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Assessment checklist task (Did the candidate…) | | Observations / comments | Result (S/NS) |
| PC1.1 (part), PC1.2, KE4 | Did they show an understanding of how their work role and goals fit into the organisation’s goals? | |  |  |
| PC2.3 | Were they able to explain some possible factors that affected their work plan (if applicable)? | |  |  |
| PC2.4 | Were they able to communicate their progress on their work plan? | |  |  |
| PC3.1, PC3.3, PE3 | Were they able to seek feedback on their plan from you and seek input on something they would like to do better? | |  |  |
| FS3.1 | During this discussion did they use listening and questioning techniques to seek information and confirm understanding?  (For example, ask questions of you as the assessor, use active listening techniques such as summarising and paraphrasing discussions) | |  |  |
| FS3.2 | During this discussion did they use suitable language, phrasing and pronunciation to this context?  (For example, be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission required? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

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| --- | --- | --- | --- | --- |
| **BSBPEF202 Assessment Instrument 3 – Questions** | | | | |
| Assessment Name | | Task 3 – Question instrument | | |
| Unit of Competency | | BSBPEF202 Plan and apply time management | | |
| Assessment Context | | This assessment can be completed in a classroom, workplace, or independent learning environment. | | |
| Candidate Name | |  | | |
| Date of Assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Inform candidate of the Not Competent and complaints and appeals process, ensure the candidate is ready for the assessment.  **Explanation of task:**  Inform the candidate of the assessment process – they need to complete all the questions in writing below (this can be done electronically or by hand using a pen and then scanned in).  **Reasonable adjustment:**  These questions can be given and answered verbally if required  **Duration**  The candidate will have 30 mins to complete the questioning instrument. They may ask you for more time if needed  **Instructions regarding assessment records:**  Where questions are not answered satisfactorily, the assessor can rephrase questions and allow candidate to re-address their answer/s - then make notes reflecting this.  Record results as S (satisfactory) or NS (not satisfactory) in the questioning instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment.  Check the model answers for consistency with making judgements. Model answers and guidance is provided to the assessor in their marking guide (in Appendix 2) | | |
| Instructions to candidate | | **Explanation of task:**  You need to answer all the following questions, your answer needs to be at least one to two sentences each. Check with the assessor if you are unsure of these instructions or to clarify what the questions are asking.  If you are completing these in writing electronically or by hand, please submit to your assessor once completed.  You will have 30 mins to complete the questions. You may ask your assessor if you need more time to complete the assessment  **Reasonable adjustment:**  These questions can be given and answered verbally if required | | |
| Evidence required and decision-making rules | | All questions must be answered and be satisfactory for the task to be satisfactory. Each answer must be one to two sentences in length (unless otherwise specified). | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Question | | Answer (Insert model answers / assessor guidance in this version) | Results (S/NS) |
| KE2 | Summarise why each of the following features of a time management plan are beneficial:   * List of tasks * Timeframes/deadlines | |  |  |
| PC1.3, KE1 | Explain why you should use a to do list to when planning your job tasks | |  |  |
| PC1.3, KE1 | Explain why setting a timeframe for completing job tasks is important | |  |  |
| PC1.3, KE1 | How can you use an online calendar or similar apps to help you manage your time regarding job tasks? | |  |  |
| PC2.2 | If you were asked to complete a job task and couldn’t fit it in your day, what could you do to manage this situation?   1. Complete the job anyway 2. Talk to your supervisor 3. Do nothing 4. All of the above | |  |  |
| PC1.3, KE1 | If you had a lot of job tasks for that day to complete and your supervisor gave you one that you couldn’t complete, what would you say to your supervisor? | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission req’d? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

## BSBPEF202 Assessment candidate # 2

|  |  |
| --- | --- |
| **ASSESSMENT PLAN** | |
| A. Candidate name |  |
| B. Unit to be assessed | BSBPEF202 Plan and apply time management |
| C. Assessment date planned |  |
| D. Assessment date actual |  |
| E. Assessment location |  |
| F. Candidate description |  |
| G. Reasonable adjustments needed |  |
| H. Materials, resources or other documents needed for assessment |  |
| I. Special support arrangements for assessment |  |
| J. Timeline for assessment, how long and how often? |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **ASSESSMENT RESULTS**  (Complete this section after the assessments have concluded.) | | | |
| A. Task results | Assessment task | | Result |
| Assessment instrument # 1: Production of an item checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 2: Observation checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 3: Questioning Instrument | | Satisfactory  Not Satisfactory |
| B. Final assessment result | Competent  Not Competent | | |
| C. Feedback to student |  | | |
| D. Student Declaration | | D. Assessor Declaration | |
| I declare this assessment is my own work and have provided references where appropriate.  Signature: | | I declare that I have conducted a fair and valid assessment and the student has been provided with feedback.  Signature: | |

|  |  |  |  |
| --- | --- | --- | --- |
| **BSBPEF202 Assessment Instrument 1 – Production of an item** | | | |
| Assessment name | | Task 1 – Produce an item - Time management plan | |
| Unit of competency | | BSBPEF202 Plan and apply time management | |
| Assessment context | | Workplace or simulated workplace | |
| Candidate name | |  | |
| Date of assessment | |  | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of Task(s)**  Candidates are required to develop one time management plan regarding their current work role. The candidate will use a time management plan template provided (in Appendix 1 of this workbook). The time management template contains all the steps that the candidate needs to complete:  In the time management plan the candidate must select a minimum of 5 job tasks that need to be completed as part of their role and document these in the plan template.  An example of a work role, goal planning and job tasks could be: (note example included at end of these instructions - candidate can choose their own job tasks if available): Jobs: emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls etc. Job prioritizing - Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day.   * The candidate must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * They should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * The candidates work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g. Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, the candidate will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. They will then use this plan to monitor and keep track of their progress and any adjustments they need to make.  **Duration:** They have 3 weeks from the date of handout to complete the time management plan. Make sure they write down when the assessment is due and check in with you as the assessor.  **Reasonable Adjustment:** During the demonstration of tasks, they can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment. If the candidate does not have a current workplace a simulated workplace and scenario may be used. The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario**: **Assessor may adjust this scenario as per learners needs.**  They are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. They have been doing this for approximately 9 months. They have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by their supervisor, completing assessment tasks for their study, watching recordings and lessons for their study, updating students records for calls made and assessments completed.  They will use the time management template attached in this assessment to complete prioritizing their job tasks.  They must also use a digital tool such as a calendar or diary on either a computer or phone to help them with this.  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment | |
| Instructions to candidate | | **Explanation of Task(s)**  You are required to develop one time management plan regarding your current work role. If you do not have a current work role your assessor will give you a scenario to help you complete the plan template.  You will use a time management plan template provided to you (located in Appendix 1 of this workbook). The time management template contains all the steps that you need to complete:  You must select a minimum of 5 job tasks that need to be completed as part of your role and document these in the plan template  Some examples of a work role, goal planning and job tasks could be: (note example only- you can choose your own job tasks if available)  Example: Job prioritizing- Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day. E.g. emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls, printing etc   * You must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * You should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * Your work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g., Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, you will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. You will then use this plan to monitor and keep track of your progress and any adjustments you may need to make.  **Duration:** You will be given 3 weeks from the date of handout to complete the time management plan. Make sure you write down when the assessment is due, check with your assessor.  **Reasonable Adjustment:** During the demonstration of tasks, you can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment.  If you do not have a current workplace a simulated workplace and scenario may be used.  The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario: To be used if you do not have a workplace**  You are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. You have been doing this for approximately 9 months. You have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by your supervisor, completing assessment tasks for your study, watching recordings and lessons for your study, updating students records for calls made and assessments completed.  You will use the time management template attached in this assessment to complete prioritizing your job tasks. You must also use a digital tool such as a calendar or diary on either a computer or phone to help you with this. | |
| Evidence required and decision-making rules | | The item must be provided in an electronic format (this can be saved as the Word document or printed, completed by hand and a scan or photo of this submitted). The item (the plan) must meet all the criteria as listed below. | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Production of an item checklist (Does the candidate’s plan meet the following…) | | Result (S/NS) |
| PC1.1 (part) | Clearly identify work role and goal | |  |
| PC1.4 (part) | Clearly outline tasks to be completed (minimum of 5 tasks must be covered) | |  |
| (PC1.4) part, FS4 | Each task has a clear timeframe to be completed by | |  |
| PC1.1 (part), PE1 | Discusses and agrees on this plan with a relevant person | |  |
| PC2.1, FS1, FS2, FS5 | This document is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor | |  |
| PC1.4, FS6.1 | Explains those task/s that are a priority and why | |  |
| KE3, FS5 | Identifies relevant organisational policies and procedures to own work role | |  |
| PE2 (part), FS7 | Includes an outline of at least one digital tool that will be used and explains how this would be beneficial | |  |
| PC2.3, KE1, KE5, FS6.2 | Identifies at least one potential problem that may arise and indicates how this will be managed | |  |
| PC3.1, PE3 | Indicates who you will seek feedback from and when | |  |
| PC3.2, PE2 | Contains a clear indication of those tasks completed when submitted and records any changes made | |  |
| Assessment result | | Satisfactory  Not Satisfactory | |
| Resubmission required? | | Yes  No | |
| Resubmission notes | |  | |
| Feedback to candidate | |  | |
| Assessor name | |  | |
| Assessor signature | |  | |
| Candidate signature | |  | |

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| **BSBPEF202 Assessment Instrument 2 – Observation** | | | | |
| Assessment name | | Task 2 - Observation and discussion on Task 1 (time management plan) | | |
| Unit of competency | | BSBPEF202 Plan and apply time management | | |
| Assessment context | | Workplace or simulated workplace | | |
| Candidate name | |  | | |
| Date of assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of tasks:**  You will ask them the following questions in relation to their submitted time management plan (Task 1) plan (note questions can be re-phrased if needed).   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed times and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions you are looking for them to demonstrate the following skills and knowledge:   * Show they understand how their work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected their work plan (if applicable) * Be able to communicate their progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on their plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure they also ask you questions and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (for example be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood)   **Duration:** This task should take approximately 15 minutes to complete  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment. | | |
| Instructions to candidate | | **Explanation of tasks:**  You assessor will ask you some questions in relation to your plan you have submitted and how you feel you went with this task.   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed timeframes and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions they are looking that you can demonstrate the following skills and knowledge:   * Show you understand how your work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected your work plan (if applicable) * Be able to communicate your progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on your plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure you also ask questions of the assessor and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (you should be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | | |
| Evidence required and decision-making rules | | To be satisfactory they must demonstrate each of the skills and knowledge to the level indicated in the checklist below at least once during this task | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Assessment checklist task (Did the candidate…) | | Observations / comments | Result (S/NS) |
| PC1.1 (part), PC1.2, KE4 | Did they show an understanding of how their work role and goals fit into the organisation’s goals? | |  |  |
| PC2.3 | Were they able to explain some possible factors that affected their work plan (if applicable)? | |  |  |
| PC2.4 | Were they able to communicate their progress on their work plan? | |  |  |
| PC3.1, PC3.3, PE3 | Were they able to seek feedback on their plan from you and seek input on something they would like to do better? | |  |  |
| FS3.1 | During this discussion did they use listening and questioning techniques to seek information and confirm understanding?  (For example, ask questions of you as the assessor, use active listening techniques such as summarising and paraphrasing discussions) | |  |  |
| FS3.2 | During this discussion did they use suitable language, phrasing and pronunciation to this context?  (For example, be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission required? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

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| **BSBPEF202 Assessment Instrument 3 – Questions** | | | | |
| Assessment Name | | Task 3 – Question instrument | | |
| Unit of Competency | | BSBPEF202 Plan and apply time management | | |
| Assessment Context | | This assessment can be completed in a classroom, workplace, or independent learning environment. | | |
| Candidate Name | |  | | |
| Date of Assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Inform candidate of the Not Competent and complaints and appeals process, ensure the candidate is ready for the assessment.  **Explanation of task:**  Inform the candidate of the assessment process – they need to complete all the questions in writing below (this can be done electronically or by hand using a pen and then scanned in).  **Reasonable adjustment:**  These questions can be given and answered verbally if required  **Duration**  The candidate will have 30 mins to complete the questioning instrument. They may ask you for more time if needed  **Instructions regarding assessment records:**  Where questions are not answered satisfactorily, the assessor can rephrase questions and allow candidate to re-address their answer/s - then make notes reflecting this.  Record results as S (satisfactory) or NS (not satisfactory) in the questioning instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment.  Check the model answers for consistency with making judgements. Model answers and guidance is provided to the assessor in their marking guide (in Appendix 2) | | |
| Instructions to candidate | | **Explanation of task:**  You need to answer all the following questions, your answer needs to be at least one to two sentences each. Check with the assessor if you are unsure of these instructions or to clarify what the questions are asking.  If you are completing these in writing electronically or by hand, please submit to your assessor once completed.  You will have 30 mins to complete the questions. You may ask your assessor if you need more time to complete the assessment  **Reasonable adjustment:**  These questions can be given and answered verbally if required | | |
| Evidence required and decision-making rules | | All questions must be answered and be satisfactory for the task to be satisfactory. Each answer must be one to two sentences in length (unless otherwise specified). | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Question | | Answer (Insert model answers / assessor guidance in this version) | Results (S/NS) |
| KE2 | Summarise why each of the following features of a time management plan are beneficial:   * List of tasks * Timeframes/deadlines | |  |  |
| PC1.3, KE1 | Explain why you should use a to do list to when planning your job tasks | |  |  |
| PC1.3, KE1 | Explain why setting a timeframe for completing job tasks is important | |  |  |
| PC1.3, KE1 | How can you use an online calendar or similar apps to help you manage your time regarding job tasks? | |  |  |
| PC2.2 | If you were asked to complete a job task and couldn’t fit it in your day, what could you do to manage this situation?   1. Complete the job anyway 2. Talk to your supervisor 3. Do nothing 4. All of the above | |  |  |
| PC1.3, KE1 | If you had a lot of job tasks for that day to complete and your supervisor gave you one that you couldn’t complete, what would you say to your supervisor? | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission req’d? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

## BSBPEF202 Assessment candidate # 3

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| **ASSESSMENT PLAN** | |
| A. Candidate name |  |
| B. Unit to be assessed | BSBPEF202 Plan and apply time management |
| C. Assessment date – planned |  |
| D. Assessment date – actual |  |
| E. Assessment location |  |
| F. Candidate description |  |
| G. Reasonable adjustments needed |  |
| H. Materials, resources or other documents needed for assessment |  |
| I. Special support arrangements for assessment |  |
| J. Timeline for assessment, how long and how often? |  |

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| **ASSESSMENT RESULTS**  (Complete this section after the assessments have concluded.) | | | |
| A. Task results | Assessment task | | Result |
| Assessment instrument # 1: Production of an item checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 2: Observation checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 3: Questioning Instrument | | Satisfactory  Not Satisfactory |
| B. Final assessment result | Competent  Not Competent | | |
| C. Feedback to student |  | | |
| D. Student Declaration | | D. Assessor Declaration | |
| I declare this assessment is my own work and have provided references where appropriate.  Signature: | | I declare that I have conducted a fair and valid assessment and the student has been provided with feedback.  Signature: | |

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| **BSBPEF202 Assessment Instrument 1 – Production of an item** | | | |
| Assessment name | | Task 1 – Produce an item - Time management plan | |
| Unit of competency | | BSBPEF202 Plan and apply time management | |
| Assessment context | | Workplace or simulated workplace | |
| Candidate name | |  | |
| Date of assessment | |  | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of Task(s)**  Candidates are required to develop one time management plan regarding their current work role. The candidate will use a time management plan template provided (in Appendix 1 of this workbook). The time management template contains all the steps that the candidate needs to complete:  In the time management plan the candidate must select a minimum of 5 job tasks that need to be completed as part of their role and document these in the plan template.  An example of a work role, goal planning and job tasks could be: (note example included at end of these instructions - candidate can choose their own job tasks if available): Jobs: emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls etc. Job prioritizing - Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day.   * The candidate must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * They should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * The candidates work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g. Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, the candidate will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. They will then use this plan to monitor and keep track of their progress and any adjustments they need to make.  **Duration:** They have 3 weeks from the date of handout to complete the time management plan. Make sure they write down when the assessment is due and check in with you as the assessor.  **Reasonable Adjustment:** During the demonstration of tasks, they can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment. If the candidate does not have a current workplace a simulated workplace and scenario may be used. The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario**: **Assessor may adjust this scenario as per learners needs.**  They are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. They have been doing this for approximately 9 months. They have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by their supervisor, completing assessment tasks for their study, watching recordings and lessons for their study, updating students records for calls made and assessments completed.  They will use the time management template attached in this assessment to complete prioritizing their job tasks.  They must also use a digital tool such as a calendar or diary on either a computer or phone to help them with this.  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment | |
| Instructions to candidate | | **Explanation of Task(s)**  You are required to develop one time management plan regarding your current work role. If you do not have a current work role your assessor will give you a scenario to help you complete the plan template.  You will use a time management plan template provided to you (located in Appendix 1 of this workbook). The time management template contains all the steps that you need to complete:  You must select a minimum of 5 job tasks that need to be completed as part of your role and document these in the plan template  Some examples of a work role, goal planning and job tasks could be: (note example only- you can choose your own job tasks if available)  Example: Job prioritizing- Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day. E.g. emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls, printing etc   * You must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * You should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * Your work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g., Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, you will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. You will then use this plan to monitor and keep track of your progress and any adjustments you may need to make.  **Duration:** You will be given 3 weeks from the date of handout to complete the time management plan. Make sure you write down when the assessment is due, check with your assessor.  **Reasonable Adjustment:** During the demonstration of tasks, you can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment.  If you do not have a current workplace a simulated workplace and scenario may be used.  The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario: To be used if you do not have a workplace**  You are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. You have been doing this for approximately 9 months. You have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by your supervisor, completing assessment tasks for your study, watching recordings and lessons for your study, updating students records for calls made and assessments completed.  You will use the time management template attached in this assessment to complete prioritizing your job tasks. You must also use a digital tool such as a calendar or diary on either a computer or phone to help you with this. | |
| Evidence required and decision-making rules | | The item must be provided in an electronic format (this can be saved as the Word document or printed, completed by hand and a scan or photo of this submitted). The item (the plan) must meet all the criteria as listed below. | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Production of an item checklist (Does the candidate’s plan meet the following…) | | Result (S/NS) |
| PC1.1 (part) | Clearly identify work role and goal | |  |
| PC1.4 (part) | Clearly outline tasks to be completed (minimum of 5 tasks must be covered) | |  |
| (PC1.4) part, FS4 | Each task has a clear timeframe to be completed by | |  |
| PC1.1 (part), PE1 | Discusses and agrees on this plan with a relevant person | |  |
| PC2.1, FS1, FS2, FS5 | This document is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor | |  |
| PC1.4, FS6.1 | Explains those task/s that are a priority and why | |  |
| KE3, FS5 | Identifies relevant organisational policies and procedures to own work role | |  |
| PE2 (part), FS7 | Includes an outline of at least one digital tool that will be used and explains how this would be beneficial | |  |
| PC2.3, KE1, KE5, FS6.2 | Identifies at least one potential problem that may arise and indicates how this will be managed | |  |
| PC3.1, PE3 | Indicates who you will seek feedback from and when | |  |
| PC3.2, PE2 | Contains a clear indication of those tasks completed when submitted and records any changes made | |  |
| Assessment result | | Satisfactory  Not Satisfactory | |
| Resubmission required? | | Yes  No | |
| Resubmission notes | |  | |
| Feedback to candidate | |  | |
| Assessor name | |  | |
| Assessor signature | |  | |
| Candidate signature | |  | |

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| **BSBPEF202 Assessment Instrument 2 – Observation** | | | | |
| Assessment name | | Task 2 - Observation and discussion on Task 1 (time management plan) | | |
| Unit of competency | | BSBPEF202 Plan and apply time management | | |
| Assessment context | | Workplace or simulated workplace | | |
| Candidate name | |  | | |
| Date of assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of tasks:**  You will ask them the following questions in relation to their submitted time management plan (Task 1) plan (note questions can be re-phrased if needed).   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed times and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions you are looking for them to demonstrate the following skills and knowledge:   * Show they understand how their work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected their work plan (if applicable) * Be able to communicate their progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on their plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure they also ask you questions and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (for example be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood)   **Duration:** This task should take approximately 15 minutes to complete  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment. | | |
| Instructions to candidate | | **Explanation of tasks:**  You assessor will ask you some questions in relation to your plan you have submitted and how you feel you went with this task.   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed timeframes and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions they are looking that you can demonstrate the following skills and knowledge:   * Show you understand how your work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected your work plan (if applicable) * Be able to communicate your progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on your plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure you also ask questions of the assessor and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (you should be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | | |
| Evidence required and decision-making rules | | To be satisfactory they must demonstrate each of the skills and knowledge to the level indicated in the checklist below at least once during this task | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Assessment checklist task (Did the candidate…) | | Observations / comments | Result (S/NS) |
| PC1.1 (part), PC1.2, KE4 | Did they show an understanding of how their work role and goals fit into the organisation’s goals? | |  |  |
| PC2.3 | Were they able to explain some possible factors that affected their work plan (if applicable)? | |  |  |
| PC2.4 | Were they able to communicate their progress on their work plan? | |  |  |
| PC3.1, PC3.3, PE3 | Were they able to seek feedback on their plan from you and seek input on something they would like to do better? | |  |  |
| FS3.1 | During this discussion did they use listening and questioning techniques to seek information and confirm understanding?  (For example, ask questions of you as the assessor, use active listening techniques such as summarising and paraphrasing discussions) | |  |  |
| FS3.2 | During this discussion did they use suitable language, phrasing and pronunciation to this context?  (For example, be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission required? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

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| **BSBPEF202 Assessment Instrument 3 – Questions** | | | | |
| Assessment Name | | Task 3 – Question instrument | | |
| Unit of Competency | | BSBPEF202 Plan and apply time management | | |
| Assessment Context | | This assessment can be completed in a classroom, workplace, or independent learning environment. | | |
| Candidate Name | |  | | |
| Date of Assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Inform candidate of the Not Competent and complaints and appeals process, ensure the candidate is ready for the assessment.  **Explanation of task:**  Inform the candidate of the assessment process – they need to complete all the questions in writing below (this can be done electronically or by hand using a pen and then scanned in).  **Reasonable adjustment:**  These questions can be given and answered verbally if required  **Duration**  The candidate will have 30 mins to complete the questioning instrument. They may ask you for more time if needed  **Instructions regarding assessment records:**  Where questions are not answered satisfactorily, the assessor can rephrase questions and allow candidate to re-address their answer/s - then make notes reflecting this.  Record results as S (satisfactory) or NS (not satisfactory) in the questioning instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment.  Check the model answers for consistency with making judgements. Model answers and guidance is provided to the assessor in their marking guide (in Appendix 2) | | |
| Instructions to candidate | | **Explanation of task:**  You need to answer all the following questions, your answer needs to be at least one to two sentences each. Check with the assessor if you are unsure of these instructions or to clarify what the questions are asking.  If you are completing these in writing electronically or by hand, please submit to your assessor once completed.  You will have 30 mins to complete the questions. You may ask your assessor if you need more time to complete the assessment  **Reasonable adjustment:**  These questions can be given and answered verbally if required | | |
| Evidence required and decision-making rules | | All questions must be answered and be satisfactory for the task to be satisfactory. Each answer must be one to two sentences in length (unless otherwise specified). | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Question | | Answer (Insert model answers / assessor guidance in this version) | Results (S/NS) |
| KE2 | Summarise why each of the following features of a time management plan are beneficial:   * List of tasks * Timeframes/deadlines | |  |  |
| PC1.3, KE1 | Explain why you should use a to do list to when planning your job tasks | |  |  |
| PC1.3, KE1 | Explain why setting a timeframe for completing job tasks is important | |  |  |
| PC1.3, KE1 | How can you use an online calendar or similar apps to help you manage your time regarding job tasks? | |  |  |
| PC2.2 | If you were asked to complete a job task and couldn’t fit it in your day, what could you do to manage this situation?   1. Complete the job anyway 2. Talk to your supervisor 3. Do nothing 4. All of the above | |  |  |
| PC1.3, KE1 | If you had a lot of job tasks for that day to complete and your supervisor gave you one that you couldn’t complete, what would you say to your supervisor? | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission req’d? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

## BSBPEF202 Assessment candidate # 4

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| **ASSESSMENT PLAN** | |
| A. Candidate name |  |
| B. Unit to be assessed | BSBPEF202 Plan and apply time management |
| C. Assessment date – planned |  |
| D. Assessment date – actual |  |
| E. Assessment location |  |
| F. Candidate description |  |
| G. Reasonable adjustments needed |  |
| H. Materials, resources or other documents needed for assessment |  |
| I. Special support arrangements for assessment |  |
| J. Timeline for assessment, how long and how often? |  |

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| **ASSESSMENT RESULTS**  (Complete this section after the assessments have concluded.) | | | |
| A. Task results | Assessment task | | Result |
| Assessment instrument # 1: Production of an item checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 2: Observation checklist | | Satisfactory  Not Satisfactory |
| Assessment instrument # 3: Questioning Instrument | | Satisfactory  Not Satisfactory |
| B. Final assessment result | Competent  Not Competent | | |
| C. Feedback to student |  | | |
| D. Student Declaration | | D. Assessor Declaration | |
| I declare this assessment is my own work and have provided references where appropriate.  Signature: | | I declare that I have conducted a fair and valid assessment and the student has been provided with feedback.  Signature: | |

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| **BSBPEF202 Assessment Instrument 1 – Production of an item** | | | |
| Assessment name | | Task 1 – Produce an item - Time management plan | |
| Unit of competency | | BSBPEF202 Plan and apply time management | |
| Assessment context | | Workplace or simulated workplace | |
| Candidate name | |  | |
| Date of assessment | |  | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of Task(s)**  Candidates are required to develop one time management plan regarding their current work role. The candidate will use a time management plan template provided (in Appendix 1 of this workbook). The time management template contains all the steps that the candidate needs to complete:  In the time management plan the candidate must select a minimum of 5 job tasks that need to be completed as part of their role and document these in the plan template.  An example of a work role, goal planning and job tasks could be: (note example included at end of these instructions - candidate can choose their own job tasks if available): Jobs: emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls etc. Job prioritizing - Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day.   * The candidate must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * They should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * The candidates work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g. Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, the candidate will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. They will then use this plan to monitor and keep track of their progress and any adjustments they need to make.  **Duration:** They have 3 weeks from the date of handout to complete the time management plan. Make sure they write down when the assessment is due and check in with you as the assessor.  **Reasonable Adjustment:** During the demonstration of tasks, they can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment. If the candidate does not have a current workplace a simulated workplace and scenario may be used. The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario**: **Assessor may adjust this scenario as per learners needs.**  They are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. They have been doing this for approximately 9 months. They have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by their supervisor, completing assessment tasks for their study, watching recordings and lessons for their study, updating students records for calls made and assessments completed.  They will use the time management template attached in this assessment to complete prioritizing their job tasks.  They must also use a digital tool such as a calendar or diary on either a computer or phone to help them with this.  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment | |
| Instructions to candidate | | **Explanation of Task(s)**  You are required to develop one time management plan regarding your current work role. If you do not have a current work role your assessor will give you a scenario to help you complete the plan template.  You will use a time management plan template provided to you (located in Appendix 1 of this workbook). The time management template contains all the steps that you need to complete:  You must select a minimum of 5 job tasks that need to be completed as part of your role and document these in the plan template  Some examples of a work role, goal planning and job tasks could be: (note example only- you can choose your own job tasks if available)  Example: Job prioritizing- Looking at the jobs tasks for the day and deciding what job tasks should be completed first (prioritizing) to the least important job tasks for the day. E.g. emails, cleaning, customer service, packing stock, ordering stock, administration job tasks, phone calls, printing etc   * You must use a form of digital technology such as a computer, iPad etc to complete the assessment, this must be presented in an electronic format. * You should set timeframes to this and use where possible electronic tools to assist them such as electronic calendar /diary (phone or computer) with reminders of dates and requirements   The plan must identify:   * Your work role and goals * Clearly outline the tasks to be completed - minimum number of 5 job tasks should be included in the plan * Explain the job tasks that are a priority and why * Make sure that the plan identifies any relevant organisational policies and procedures to their own work role e.g., Standard operating procedures (SOPs) * Make sure the time management plan is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor * Identifies at least one potential problem that may arise and indicates how this will be managed.   Once the plan is complete, you will discuss this draft plan with a peer/colleague/supervisor or other appropriate person. You will then use this plan to monitor and keep track of your progress and any adjustments you may need to make.  **Duration:** You will be given 3 weeks from the date of handout to complete the time management plan. Make sure you write down when the assessment is due, check with your assessor.  **Reasonable Adjustment:** During the demonstration of tasks, you can have a support person to assist with clarification if needed. When a support person in not available, your assessor can play the role of support during the assessment.  If you do not have a current workplace a simulated workplace and scenario may be used.  The Trainer or assessor may play the role of the supervisor and fellow students may also be colleagues able to assist them.  **Example scenario: To be used if you do not have a workplace**  You are completing work experience as a Trainer and Assessor while completing your TAE40116 qualification. You have been doing this for approximately 9 months. You have many job tasks that need to be completed each day such as responding to students emails and phone calls, marking assessments, having any assessments checked by your supervisor, completing assessment tasks for your study, watching recordings and lessons for your study, updating students records for calls made and assessments completed.  You will use the time management template attached in this assessment to complete prioritizing your job tasks. You must also use a digital tool such as a calendar or diary on either a computer or phone to help you with this. | |
| Evidence required and decision-making rules | | The item must be provided in an electronic format (this can be saved as the Word document or printed, completed by hand and a scan or photo of this submitted). The item (the plan) must meet all the criteria as listed below. | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Production of an item checklist (Does the candidate’s plan meet the following…) | | Result (S/NS) |
| PC1.1 (part) | Clearly identify work role and goal | |  |
| PC1.4 (part) | Clearly outline tasks to be completed (minimum of 5 tasks must be covered) | |  |
| (PC1.4) part, FS4 | Each task has a clear timeframe to be completed by | |  |
| PC1.1 (part), PE1 | Discusses and agrees on this plan with a relevant person | |  |
| PC2.1, FS1, FS2, FS5 | This document is completed legibly, clearly and follows appropriate spelling and punctuation and provided in a suitable format for the assessor | |  |
| PC1.4, FS6.1 | Explains those task/s that are a priority and why | |  |
| KE3, FS5 | Identifies relevant organisational policies and procedures to own work role | |  |
| PE2 (part), FS7 | Includes an outline of at least one digital tool that will be used and explains how this would be beneficial | |  |
| PC2.3, KE1, KE5, FS6.2 | Identifies at least one potential problem that may arise and indicates how this will be managed | |  |
| PC3.1, PE3 | Indicates who you will seek feedback from and when | |  |
| PC3.2, PE2 | Contains a clear indication of those tasks completed when submitted and records any changes made | |  |
| Assessment result | | Satisfactory  Not Satisfactory | |
| Resubmission required? | | Yes  No | |
| Resubmission notes | |  | |
| Feedback to candidate | |  | |
| Assessor name | |  | |
| Assessor signature | |  | |
| Candidate signature | |  | |

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| **BSBPEF202 Assessment Instrument 2 – Observation** | | | | |
| Assessment name | | Task 2 - Observation and discussion on Task 1 (time management plan) | | |
| Unit of competency | | BSBPEF202 Plan and apply time management | | |
| Assessment context | | Workplace or simulated workplace | | |
| Candidate name | |  | | |
| Date of assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Ensure candidate is ready for assessment and is aware of the Not Competent process and the rights to appeal. NOTE (From the unit application) An individual performing these tasks operates alongside an expert or mentor where significant support, prompting advice and modelling can be provided.  **Explanation of tasks:**  You will ask them the following questions in relation to their submitted time management plan (Task 1) plan (note questions can be re-phrased if needed).   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed times and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions you are looking for them to demonstrate the following skills and knowledge:   * Show they understand how their work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected their work plan (if applicable) * Be able to communicate their progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on their plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure they also ask you questions and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (for example be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood)   **Duration:** This task should take approximately 15 minutes to complete  **Instructions regarding assessment records:**  Record results as S (satisfactory) or NS (not satisfactory) in the observation instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment. | | |
| Instructions to candidate | | **Explanation of tasks:**  You assessor will ask you some questions in relation to your plan you have submitted and how you feel you went with this task.   * How does your work role fit into your organisations work? * How can you relate your work goal/s relate back to the organisation’s goals? * What are some challenges you have come across? How did you deal with them? What do you feel you could have done differently (if anything) * Have you finished this plan on your proposed timeframes and achieved everything? If not, then why not? * What is something you would like to know how to do better? (There must be something – if there was nothing in this plan you must then consider if you were to be given a new task – for example you are now an Assessor and Trainer – what might you like to improve on? You need to demonstrate your ability to seek feedback and input on your performance.   During these discussions they are looking that you can demonstrate the following skills and knowledge:   * Show you understand how your work role and goals fit into the organisation’s goals * Be able to explain some possible factors that affected your work plan (if applicable) * Be able to communicate your progress clearly and succinctly on your work plan * Demonstrate the ability to also seek feedback on your plan and potential areas where you might be able to improve even further * Uses listening and questioning techniques to seek information and confirm understanding (so make sure you also ask questions of the assessor and use active listening techniques such as summarising and paraphrasing discussions) * Use suitable language, phrasing, and pronunciation to this conversation (you should be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | | |
| Evidence required and decision-making rules | | To be satisfactory they must demonstrate each of the skills and knowledge to the level indicated in the checklist below at least once during this task | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Assessment checklist task (Did the candidate…) | | Observations / comments | Result (S/NS) |
| PC1.1 (part), PC1.2, KE4 | Did they show an understanding of how their work role and goals fit into the organisation’s goals? | |  |  |
| PC2.3 | Were they able to explain some possible factors that affected their work plan (if applicable)? | |  |  |
| PC2.4 | Were they able to communicate their progress on their work plan? | |  |  |
| PC3.1, PC3.3, PE3 | Were they able to seek feedback on their plan from you and seek input on something they would like to do better? | |  |  |
| FS3.1 | During this discussion did they use listening and questioning techniques to seek information and confirm understanding?  (For example, ask questions of you as the assessor, use active listening techniques such as summarising and paraphrasing discussions) | |  |  |
| FS3.2 | During this discussion did they use suitable language, phrasing and pronunciation to this context?  (For example, be polite, ensure you use positive language and phrases, avoid swearing, colloquial terms that may be misunderstood) | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission required? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

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| **BSBPEF202 Assessment Instrument 3 – Questions** | | | | |
| Assessment Name | | Task 3 – Question instrument | | |
| Unit of Competency | | BSBPEF202 Plan and apply time management | | |
| Assessment Context | | This assessment can be completed in a classroom, workplace, or independent learning environment. | | |
| Candidate Name | |  | | |
| Date of Assessment | |  | | |
| Instructions to assessor | | **General assessment information:**  Inform candidate of the Not Competent and complaints and appeals process, ensure the candidate is ready for the assessment.  **Explanation of task:**  Inform the candidate of the assessment process – they need to complete all the questions in writing below (this can be done electronically or by hand using a pen and then scanned in).  **Reasonable adjustment:**  These questions can be given and answered verbally if required  **Duration**  The candidate will have 30 mins to complete the questioning instrument. They may ask you for more time if needed  **Instructions regarding assessment records:**  Where questions are not answered satisfactorily, the assessor can rephrase questions and allow candidate to re-address their answer/s - then make notes reflecting this.  Record results as S (satisfactory) or NS (not satisfactory) in the questioning instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment.  Check the model answers for consistency with making judgements. Model answers and guidance is provided to the assessor in their marking guide (in Appendix 2) | | |
| Instructions to candidate | | **Explanation of task:**  You need to answer all the following questions, your answer needs to be at least one to two sentences each. Check with the assessor if you are unsure of these instructions or to clarify what the questions are asking.  If you are completing these in writing electronically or by hand, please submit to your assessor once completed.  You will have 30 mins to complete the questions. You may ask your assessor if you need more time to complete the assessment  **Reasonable adjustment:**  These questions can be given and answered verbally if required | | |
| Evidence required and decision-making rules | | All questions must be answered and be satisfactory for the task to be satisfactory. Each answer must be one to two sentences in length (unless otherwise specified). | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Question | | Answer (Insert model answers / assessor guidance in this version) | Results (S/NS) |
| KE2 | Summarise why each of the following features of a time management plan are beneficial:   * List of tasks * Timeframes/deadlines | |  |  |
| PC1.3, KE1 | Explain why you should use a to do list to when planning your job tasks | |  |  |
| PC1.3, KE1 | Explain why setting a timeframe for completing job tasks is important | |  |  |
| PC1.3, KE1 | How can you use an online calendar or similar apps to help you manage your time regarding job tasks? | |  |  |
| PC2.2 | If you were asked to complete a job task and couldn’t fit it in your day, what could you do to manage this situation?   1. Complete the job anyway 2. Talk to your supervisor 3. Do nothing 4. All of the above | |  |  |
| PC1.3, KE1 | If you had a lot of job tasks for that day to complete and your supervisor gave you one that you couldn’t complete, what would you say to your supervisor? | |  |  |
| Assessment result | | Satisfactory  Not Satisfactory | | |
| Resubmission req’d? | | Yes  No | | |
| Resubmission notes | |  | | |
| Feedback to candidate | |  | | |
| Assessor name | |  | | |
| Assessor signature | |  | | |
| Candidate signature | |  | | |

## BSBWRT311 RPL kit (assessor version) – Candidate # 5

| **Recognition of Prior Learning (RPL) Assessment Record**  **BSBWRT311 - Write simple documents**  This form is to be completed by an RPL assessor to record the key outcomes of the RPL assessment process. It contains a checklist of all items to be discussed and records evidence obtained during and after the RPL interview. | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Candidate details** | | | | | |
| Name: |  | | | | |
| Telephone: |  | | | | |
| E-mail: |  | | | | |
| **Assessor details** | | | | | |
| Name: |  | | | | |
| **Records** | | | | | |
| Date self-assessment RPL kit returned: | | | |  | |
| Date of enrolment: | | | |  | |
| Date of assessor pre-interview call: | | | |  | |
| Planned RPL interview method: | | | | Telephone  Meeting  Other🡪specify: | |
| Planned RPL interview time and date: | | | |  | |
| Actual RPL interview time and date: | | | |  | |
| Date follow-up evidence list sent: | | | | TBA | |
| Date follow-up evidence received: | | | | TBA | |
| Date statutory declaration received: | | | | TBA | |
| Date feedback provided to candidate: | | | | TBA | |
| **Assessment decision** | | | | | |
| I declare that I have conducted a fair and valid assessment and have provided feedback to the candidate. | | | | | |
| Assessment decision: | | Competent  Not Competent | | | |
| Assessor signature and date: | | |  | | |
| **Assessment Conditions** | | | | | |
| Assessor is to review the assessment process and evidence and indicate Yes/No to having followed all requirements | | | | | |
| I have reviewed the Unit of Competency and Assessment Requirements documentation in relation to conducting this assessment for this unit of competency | | | | | Yes  No |
| Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. This includes access to:   * office equipment and resources to assist in the production of documents * organisational policies and procedures * examples of documents to review. | | | | | Yes  No |
| I satisfy the requirements for assessors from the unit - Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards. | | | | | Yes  No |

| Recognition of Prior Learning (RPL) Assessment Record – BSBWRT311 - Write simple documents | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Required experience and knowledge** | **Suggested questions / notes** | **Evidence provided** | | | | **Result** | | | |
| **Inter-view** | **3rd party** | **Other Evidence**  **(specify what / evidence #)** | **Comments** | **S** | | **NS** | |
| **Elements** | | | | | | | | | | |
| Plan simple document (Element 1) | Tell me about the type of documents you create in your job – what are they and who are they for? (This is to set the scene for the following questions – examples could be things like emails to customers, meeting agendas and notes, invitations, letters to clients ….)  For one of your documents tell me how you determined your audience, purpose, and requirements for your document according to organisation policies and procedures? [PC1.1]  Candidate to discuss – needs to relate to examples given and demonstrate understanding of audience and purpose (e.g. need to be formal or can it be informal, internal or external etc)  For one of your documents tell me how you determined the required format, style, and structure for document? [PC1.2]  Candidate to discuss – needs to relate to examples given and demonstrate understanding of audience and purpose (e.g. need to be formal or can it be informal etc)  For one of your documents tell me how you established the correct method of communication? [PC1.3]  Candidate to discuss – needs to relate to examples given and demonstrate understanding of relevant communication challenges (eg need to be formal or can it be informal etc)  For one of your documents tell me how you established key points to be included in your document? [PC1.4]  Candidate to discuss – needs to relate to examples given and demonstrate understanding of key points versus less important matters to keep the message relevant and clear | ✓ |  |  |  |  | |  | |
| Draft simple document (Element 2) | For one of your documents tell me how developed the draft document to communicate key points? [PC2.1]  Examples could include having someone else read, have a checklist, self-review, using templates or set formats  How did you ensure your draft met the purpose and requirements for the document? [PC2.2]  May be covered in previous question, examples could include having someone else read, have a checklist, self-review, using templates or set formats  Did you have to obtain and include any additional required information in your draft document? If so, what was it and why? [PC2.3]  Answer should be consistent with above responses | ✓ |  | See also PE1 |  |  | |  | |
| Finalise simple document  (Element 3) | In your workplace are there any documents that you must have a supervisor or colleague for example proofread before you can send them? [PC3.1]  Maybe answered with question for PC2.1, ensure they know which documents their organisation would require to be proofread/approved  What changes did you have to make to one of your documents? Discuss how you ensured those changes were correctly made e.g. that the document was checked again before it was finalised? [PC3.2]  Answer should be consistent with above responses | ✓ |  | See also PE1 | If required to verify authenticity of evidence provided assessor may choose to use third party report form |  | |  | |
| **Performance Evidence** | | | | | | | | | | |
| Plan, draft and finalise three different simple documents that accurately convey the required basic information in a format suitable for the intended audience and purpose according to organisational policies and procedures for document production. | Needs to provide at least **three** and they must each be a different type of document [PE1]  Examples of different simple documents in evidence could include but are not limited to the following:   * general emails * procedures * business letters * meeting agendas   If required request a third-party report from supervisor to verify authenticity can be requested  Each document must demonstrate appropriate spelling, grammar, clear format and clear message which will demonstrate suitable drafting and proofreading requirements | ✓ | ✓ | ✓ | Document 1: |  | |  | |
| ✓ | Document 2: |
| ✓ | Document 3 |
| **Knowledge Evidence** | | | | | | | | | | |
| Processes for checking:  basic readability, grammar, spelling, sentence and paragraph sequencing and structure, and punctuation | This may have been covered in Element 1.  How do you check your documents for spelling, grammar and punctuation issues? [KE1.1]  For example use of spell and grammar checking functions in word processing software, using other people to check, following formats or templates.  What is your process for ensuring your document is readable, and that the sentences, paragraph sequencing and structure of the document are correct? [KE1.1]  This question may have been answered either in element 1 or above | ✓ |  |  |  |  | |  | |
| Processes for checking:  suitability of document for audience, purpose, and format | This KE has been covered in Element 1 [KE1.2] | ✓ |  |  |  |  | |  | |
| Organisational policies and procedures relating to written communication | What are two examples of your organisations policy and procedures for written documents? [KE2]  Examples could include things such as using templates, corporate style guides, use of logos, signatures, other formatting requirements | ✓ |  |  |  |  | |  | |
| Written communication methods, including:  general emails  procedures  business letters  meeting agendas | When would you use each of the following written communication methods and why?   1. general emails [KE3.1] 2. procedures [KE3.2] 3. business letters [KE3.3] 4. meeting agenda [KE3.4]   General emails can be internal or external, while professional may be less formal than letters, quick and easy to use  Procedures are used for internal purposes to make sure staff know process to follow  Business letters are more formal than emails, used only for external purposes typically  Meeting agenda may be for internal or external use (typically internal) and are normally brief and outline when, who for, where and what will be addressed in a meeting. | ✓ |  |  |  |  | |  | |
| Different formats, styles and structures for documents | Should be addressed in above question and PE1 evidence.  If not prompt What are three examples of different formats, styles and structures for documents? [KE4].  Needs to demonstrate at least 3 different document styles or formats. | ✓ |  | See also PE1 |  |  | |  | |
| **Foundation Skills** (typically addressed with the Performance Criteria – if this is not explicitly assessed gain additional evidence and note here) | | | | | | |  | |  | |
| Reading | Interprets a variety of text to determine and confirm task requirements [FS1] | ✓ |  | ✓ | Ensure demonstrates in interview and RPL evidence (in particular RPL process, preparation for RPL interview, PE evidence working with a range of texts, such as emails, information sheets, forms, letters) |  | |  | |
| Proofreads document checking for grammar, spelling, structure, and suitability of style and format for audience [FS2] |
| Oral Communication | Uses listening and questioning skills to seek additional information or confirmation of task completion [FS3] | ✓ |  |  | Ensure that all oral communication, as part of RPL process demonstrates their ability to ask clear questions to confirm understanding or clarify requirements and seek additional information to ensure task is complete |  | |  | |
| Self-management | Follows accepted communication practices and protocols when seeking information or feedback from others [FS4] | ✓ |  |  | Ensure that evidence of planning, drafting and finalising documents also demonstrates following accepted communication practices (knowledge of organisational requirements and follows those) |  | |  | |
| Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes [FS5] | ✓ |  |  | Addressed in elements 1, 2 and 3  Also ensure is demonstrated through RPL process for organising and completing RPL requirements such as setting interview, confirming requirements, attending, providing follow up evidence as required.  Interview discussion should also support planning and prioritising strategies and skills |  | |  | |
| Technology | Uses the main features and functions of digital tools to complete work tasks [FS6] |  |  | See also PE1  & RPL Process | Ensure is demonstrated through the RPL process (emails sent in communication with the assessor, evidence provided requiring finalising using technology such as word processors) |  | |  | |

## Resources and templates (as needed)

### RPL third party report template

|  |  |
| --- | --- |
| RPL THIRD PARTY REPORT  **Instructions to candidate:** Print this page and give it to a supervisor or manager who can verify that you have demonstrated the activities and attributes listed in the certification in your role. Explain that the report will be used as evidence for your assessment  **Instructions to third party/ supervisor/ manager:** Your confirmation is sought as part of the candidate’s evidence for the following unit of competency: | |
| Unit of competency |  |
| Please verify if the candidate has undertaken the tasks listed below in a manner that meets or exceeds your organisations standards, by completing your details below and signing in the space provided. You will be contacted by the RTO and/or Assessor to verify authentication of the information you provide. | |
| Candidate name |  |
| Position |  |
| Organisation |  |
| Certification | I verify that the above candidate has undertaken and demonstrated the following to my satisfaction: |
| I can be contacted on the details below if verification is required. |
| Certifier’s full name |  |
| Position |  |
| Organisation |  |
| Contact number |  |
| Email address |  |
| Signature |  |
| Date |  |

## Assessor’s observation checklist for assessment task 2

Note: Submit as many copies of this page as necessary if more than one assessor is used to witness you undertaking the five assessment tasks, being sure to indicate which tasks were observed by each assessor.

|  |
| --- |
| Candidate name: |
| Which assessments tasks were observed? |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Instructions to assessors:** This checklist is used to record your observation of the candidate undertaking task 2. When completing this checklist you must ensure that:   * Each checklist item is assessed against the criteria listed. * An assessment result of ‘Yes’ or ‘No’ is recorded on the right of the checklist. * Feedback is provided to the student. * The candidate is advised of the assessment result. | | | | | |
| **Checklist item:**  While directly observing the candidate undertaking five assessments, did the candidate: | | | | **Result** |
| 1. Undertake the assessment of five candidates against one or more units of competency? | | | | Yes No |
| 2. Undertake these assessments with real candidates within the VET context? | | | | Yes No |
| 3. Select and use tools and instruments that use different assessment methods and instruments, involving a range of activities and events? | | | | Yes No |
| 4. Arrange for identified material and appropriate resources to be available for the assessments? | | | | Yes No |
| 5. Determine the need and, if necessary, arrange for learner support (such as interpreters, distance assessment, etc.) during the assessment processes?  N/A | | | | Yes No |
| 6. Explain the assessment process, benchmarks and instructions to the learners? | | | | Yes No |
| 7. Undertook an RPL assessment of a candidate and explained the types of evidence to be submitted. | | | | Yes No |
| 8. Use the assessment tools to conduct the assessments and gather evidence? | | | | Yes No |
| 9. Integrate assessment tasks where possible, and document any changes to the assessment instrument where necessary? | | | | Yes No |
| 10. Communicate information and assessment process requirements clearly, using techniques appropriate to the audience and environment – including appropriate pitch, tone and speed in communication? | | | | Yes No |
| 11. Interact appropriately with candidates to build rapport and understanding – including using at least two of the following rapport-building techniques (described in section 3.1.1): • Initial small talk • Shared experiences • Humour • Non-verbal signals • Show empathy. | | | | Yes No |
| 12. Obtain specific information to support the assessment processes? | | | | Yes No |
| 13. Adjust personal communication style in recognition of the values and experiences of others to build rapport – including the following adjustments based on the style of the person with whom they interacted:   * Controller: Focused on the broad outline rather than details. Anticipated objections and solved problems on the spot. * Innovator: Allowed time for talk and socialising. Illustrated points with stories and personal experiences. Focused on the big picture, the creative possibilities. * Thinker: Provided lots of lists, charts, graphs. * Supporter: Shared personal details and things in common. | | | | Yes No |
| 14. Cooperate and collaborate with others and contribute to activities requiring joint responsibility and accountability – including at least two of the following techniques: • Look for common ground • Learn about others • Critique results, not people • Give and get respect • Proceed slowly • Be explicit and clear. | | | | Yes No |
| 15. Develop a professional relationship with the candidates that reflect sensitivity to individual differences and enables two-way feedback? | | | | Yes No |
| 16A. Apply the principles of assessment during the assessment processes (Fairness, Flexibility, Validity, Reliability)? | | | | Yes No |
| 16B. Apply the rules of evidence during the assessment processes (Validity, Sufficiency, Authenticity, Currency)? | | | | Yes No |
| 17. Make reasonable adjustments to the learner and unit of competency with at least one candidate? | | | | Yes No |
| 18. Address risks to safety immediately as they arose? (If none arose mark ‘N/A’.)  N/A | | | | Yes No |
| 19. Provide feedback to the learners at appropriate points in the assessment processes and discuss the assessment outcome? | | | | Yes No |
| Assessment task result | | Is a reassessment or resubmission required? | | | |
| Satisfactory  Not Satisfactory | | Yes  No | | | |
| Resubmission notes | | | | | |
| Feedback | | | | | |
| Assessor name | Assessor signature | | Date | | |

## Statutory declaration of third-party assessor

If your assessments were witnessed and assessed by a non-Plenty Training assessor, please ask this assessor to complete and execute the following statutory declaration.

Commonwealth of Australia

**STATUTORY DECLARATION**

Statutory Declarations Act 1959

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Insert the name, address and occupation of person making the declaration | |  |  |  | | --- | --- | --- | | I,1 |  | [name of assessor] | |  |  | [address of assessor] | |  |  | [occupation of assessor] | | | | | | | | | | |
|  | make the following declaration under the Statutory Declarations Act 1959: | | | | | | | | | |
| 2. Set out matter declared to in numbered paragraphs | |  |  |  | | --- | --- | --- | | 2 1. I declare that I witnessed |  | name of student |   undertaking the meeting described in the attached assessment workbook **PT-TAEASS402-ASS** and that my recorded observations and notes represent a fair and accurate assessment of this student’s performance in the associated tasks.  2. I declare that I have maintained my professional competency via on-going and recent professional development in (1) the vocational areas assessed and (2) in my training and assessment practices, and that I fulfil all applicable assessor requirements detailed in the Standards for Registered Training Organisations (RTOs) 2015.  3. I declare that I possess the following qualifications: [check all that apply]  TAE50111 Diploma of Vocational Education and Training or  TAE50116 Diploma of Vocational Education and Training or  TAE50211 Diploma of Training Design and Development or  TAE50216 Diploma of Training Design and Development or  A higher level qualification in adult education.  and that I have attached a copy of this qualification, which contains the following:  Issuing RTO name:  Issuing RTO number:  Issue date:  Testamur number: | | | | | | | | | |
|  |  | | | | | | | | | |
|  | I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this declaration are true in every particular. | | | | | | | | | |
| 3 Signature of person making the declaration |  | | | | | | | | |
|  |  | | | | | | | | |
| 4 Place  5 Day  6 Month and year | Declared at4 | |  | on5 |  | of6 |  | | |
|  | |  |  |  | | |  |  |
|  | Before me, | | | | | | | | |
| 7 Signature of person before whom the declaration is made (see over) | 7 |  | | | | | | | |
|  |  |  | | | | | | | |
| 8 Full name, qualification and address of person before whom the declaration is made (in printed letters) | 8 |  | | | | | | | |

**Note 1** A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years — see section 11 of the Statutory Declarations Act 1959.

**Note 2** Chapter 2 of the Criminal Code applies to all offences against the Statutory Declarations Act 1959 — see section 5A of the Statutory Declarations Act 1959.

**A statutory declaration under the Statutory Declarations Act 1959 may be made before–**

(1) a person who is currently licensed or registered under a law to practise in one of the following occupations:

|  |  |  |
| --- | --- | --- |
| Chiropractor | Dentist | Legal practitioner |
| Medical practitioner | Nurse | Optometrist |
| Patent attorney | Pharmacist | Physiotherapist |
| Psychologist | Trade marks attorney | Veterinary surgeon |

(2) a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described); or

(3) a person who is in the following list:

Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public

Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)

Bailiff

Bank officer with 5 or more continuous years of service

Building society officer with 5 or more years of continuous service Chief executive officer of a Commonwealth court

Clerk of a court Commissioner for Affidavits

Commissioner for Declarations

Credit union officer with 5 or more years of continuous service

Employee of the Australian Trade Commission who is:

* 1. in a country or place outside Australia; and
  2. authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
  3. exercising his or her function in that place

Employee of the Commonwealth who is:

1. in a country or place outside Australia; and
2. authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
3. exercising his or her function in that place Fellow of the National Tax Accountants’ Association

Finance company officer with 5 or more years of continuous service

Holder of a statutory office not specified in another item in this list

Judge of a court

Justice of the Peace

Magistrate

Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961

Master of a court

Member of Chartered Secretaries Australia

Member of Engineers Australia, other than at the grade of student

Member of the Association of Taxation and Management Accountants

Member of the Australasian Institute of Mining and Metallurgy

Member of the Australian Defence Force who is:

1. an officer; or
2. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 5 or more years of continuous service; or
3. a warrant officer within the meaning of that Act

Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants

Member of:

1. the Parliament of the Commonwealth; or
2. the Parliament of a State; or
3. a Territory legislature; or
4. a local government authority of a State or Territory

Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961

Notary public

Permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public

Permanent employee of:

1. the Commonwealth or a Commonwealth authority; or
2. a State or Territory or a State or Territory authority; or
3. a local government authority;

with 5 or more years of continuous service who is not specified in another item in this list

Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made

Police officer

Registrar, or Deputy Registrar, of a court Senior Executive Service employee of:

1. the Commonwealth or a Commonwealth authority; or
2. a State or Territory or a State or Territory authority Sheriff

Sheriff’s officer

Teacher employed on a full-time basis at a school or tertiary education institution

## 3.11 Assessor’s marking checklist for assessment task 2

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Instructions to assessors: This checklist is used to record your evaluation of the candidate’s evidence provided in task 2.  When completing this checklist, you must ensure that:   * Each checklist item is assessed against the criteria listed. * An assessment result of ‘Yes’ or ‘No’ is recorded on the right of the checklist. * Feedback is provided to the student. * The candidate is advised of the assessment result. | | | | |
| **Checklist item:**  Did the Candidate: | | | | **Result** |
| 1. Accurately record the details of the five assessment events in section 3.2? | | | | Yes  No |
| 2. Provide Observation Checklist covering all five assessments, witnessed by a suitable observer with any additional required documentation (such as statutory declaration, copy of observer’s qualifications if required) | | | | Yes  No |
| 3. Suitably document their five final assessment decisions in sections 3.3 through 3.7 including providing all required evidence in a suitable format for evidentiary RTO purposes (or if using own RTO’s assessment tools provides all required evidence and assessment instruments)? | | | | Yes  No |
| Assessment task result | | Is a reassessment or resubmission required? | | |
| Satisfactory  Not Satisfactory | | Yes  No | | |
| Resubmission notes | | | | |
| Feedback | | | | |
| Assessor name | Assessor signature | | Date | |

# Assessment task 3 – Review assessment processes

## Instructions

This assessment task involves you reviewing the assessment process you completed in section 3 by seeking feedback on the assessment process from each of your five candidates. (Your assessor will also provide you with feedback after witnessing you administering the assessments.) A summary of all five candidates’ feedback is to be recorded in section 4.2. You must then complete the self-reflection questions in section 4.3.

### Decision-making rules

To achieve a satisfactory result, you must answer all questions correctly and ensure that the number of examples stated in the question is met.

### Context of assessment

This assessment task may be completed in either the classroom or workplace environment. Submissions must be made in written form unless reasonable adjustments are approved by the RTO manager. Submissions may be handwritten or in soft copy

## Feedback

Summarise the feedback provided by each of your five assessment candidates.

|  |  |  |
| --- | --- | --- |
| **Candidate** | **What went well?** | **What can be improved?** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

## Self-reflection

Conduct a reflection on your own performances for the five assessments conducted by reviewing the three questions below, writing a one to two paragraphs for each question.

|  |  |
| --- | --- |
| **Questions** | **Self-evaluation** |
| What worked well? |  |
| What went wrong? |  |
| How could you improve? |  |

Based upon the feedback received from your five assessment candidates, and by self-reflection on your own performance noted above, what are the top three things you will concentrate on to improve your assessment practices? A minimum of one paragraph for each must be completed.

|  |  |
| --- | --- |
| **#** | **Priorities** |
| 1 |  |
| 2 |  |
| 3 |  |

List at least two other relevant people who you would consult with in the workplace about improving your future assessment practices. Why would you consult these people?

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |

## 4.4 Assessor’s marking checklist for assessment task 3

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Instructions to assessors: This checklist is used to record your evaluation of the candidate’s evidence provided in task 3.  When completing this checklist you must ensure that:   * Each checklist item is assessed against the criteria listed. * An assessment result of ‘Yes’ or ‘No’ is recorded on the right of the checklist. * Feedback is provided to the student. * The candidate is advised of the assessment result. | | | | |
| **Checklist item:**  Did the Candidate: | | | | **Result** |
| 1. Submit a summary of the five candidates’ feedback? | | | | Yes  No |
| 2. Provide self-reflection in one to two paragraphs per question (reflective of the 5 assessments conducted)? | | | | Yes  No |
| 3. List at least three areas they will concentrate on to improve their assessment practices? | | | | Yes  No |
| 4. List two workplace personnel for consulting about improving future assessment practice and explain why? | | | | Yes  No |
| Assessment task result | | Is a reassessment or resubmission required? | | |
| Satisfactory  Not Satisfactory | | Yes  No | | |
| Resubmission notes | | | | |
| Feedback | | | | |
| Assessor name | Assessor signature | | Date | |

**APPENDIX 1** **– BSBPEF202 TIME MANAGEMENT PLAN TEMPLATE**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time Management Plan** | | | | | |
| Your name |  | | | | |
| Describe your work role (minimum of 2 or 3 sentences) |  | | | | |
| Describe the goal for your work role (minimum of 2 or 3 sentences describing the purpose of the role) |  | | | | |
| Who have you discussed/agreed this plan with (you must discuss and agree on this with someone relevant) |  | | | | |
| Tasks (minimum of 5) | | Expected completion[[1]](#footnote-1) | Started | Completed | Meet expected time |
| 1. | |  |  |  | Yes  No |
| 2. | |  |  |  | Yes  No |
| 3. | |  |  |  | Yes  No |
| 4. | |  |  |  | Yes  No |
| 5. | |  |  |  | Yes  No |
| What are relevant organisational policies and procedures[[2]](#footnote-2) to your work role (at least one must be mentioned) | |  | | | |
| Which of these task/s is the highest priority and explain why? | |  | | | |
| Identify at least one potential problem[[3]](#footnote-3) that may arise and indicate how you could manage this if it happens | |  | | | |
| What is at least one digital tool that you will use and explain how this would be beneficial | |  | | | |
| Organise to review this with a colleague and look for possible opportunities to improve your performance. Who will you meet with and when? | |  | | | |
| Did you need to make any adjustments while completing this – if so, what were they and why? | |  | | | |

**APPENDIX 2 – BSBPEF202 ASSESSMENT INSTRUMENT 3 (MARKER’S GUIDE)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **THIS ASSESSOR VERSION INCLUDES ASSESSOR GUIDANCE – NOT FOR CANDIDATE EYES** | | | | | |
| **BSBPEF202 Assessment Instrument 3 – Questions** | | | | | |
| Assessment Name | | Task 3 – Question instrument | | | |
| Unit of Competency | | BSBPEF202 Plan and apply time management | | | |
| Assessment Context | | This assessment can be completed in a classroom, workplace, or independent learning environment. | | | |
| Candidate Name | |  | | | |
| Date of Assessment | |  | | | |
| Instructions to assessor | | **General assessment information:**  Inform candidate of the Not Competent and complaints and appeals process, ensure the candidate is ready for the assessment.  **Explanation of task:**  Inform the candidate of the assessment process – they need to complete all the questions in writing below (this can be done electronically or by hand using a pen and then scanned in).  **Reasonable adjustment:**  These questions can be given and answered verbally if required  **Duration**  The candidate will have 30 mins to complete the questioning instrument. They may ask you for more time if needed  **Instructions regarding assessment records:**  Where questions are not answered satisfactorily, the assessor can rephrase questions and allow candidate to re-address their answer/s - then make notes reflecting this.  Record results as S (satisfactory) or NS (not satisfactory) in the questioning instrument. Make comments when relevant and provide feedback to the candidate on the outcome of the assessment.  Check the model answers for consistency with making judgements. Model answers and guidance is provided to the assessor in their marking guide | | | |
| Instructions to candidate | | **Explanation of task:**  You need to answer all the following questions, your answer needs to be at least one to two sentences each. Check with the assessor if you are unsure of these instructions or to clarify what the questions are asking.  If you are completing these in writing electronically or by hand, please submit to your assessor once completed.  You will have 30 mins to complete the questions. You may ask your assessor if you need more time to complete the assessment  **Reasonable adjustment:**  These questions can be given and answered verbally if required | | | |
| Evidence required and decision-making rules | | All questions must be answered and be satisfactory for the task to be satisfactory. Each answer must be one to two sentences in length (unless otherwise specified). | | | |
| Unit references  (e.g., PC1.1, KE2, etc.) | Question | | Answer (Insert model answers / assessor guidance in this version) | Results (S/NS) |
| KE2 | Summarise why each of the following features of a time management plan are beneficial:   * List of tasks * Timeframes/deadlines | | Examples of suitable answers could include:  List of tasks - To have a clear record of what you need to complete and monitor your progress (also helps you prioritising)  Timeframes – so you can be clear on required time and follow up on progress, helps keep you on track |  |
| PC1.3, KE1 | Explain why you should use a to do list to when planning your job tasks | | To-do lists are predominantly motivating because it gives a clear idea of what is to be accomplished each day. They can also ensure you clearly know from where to resume work the following day. |  |
| PC1.3, KE1 | Explain why setting a timeframe for completing job tasks is important | | This will stop you from spending too long on tasks by setting clear timeframes on when to do this by. This will help keep you focussed and on track. |  |
| PC1.3, KE1 | How can you use an online calendar or similar apps to help you manage your time regarding job tasks? | | These can give you reminders for upcoming tasks or dates that are less frequent, so deadlines and tasks do not get missed. They can be factored into your day.  Calendar- by putting in the job tasks, on the date required to be completed, using reminders programmed in  Apps -answer will be depending on what apps the candidate mention |  |
| PC2.2 | If you were asked to complete a job task and couldn’t fit it in your day, what could you do to manage this situation?   1. Complete the job anyway 2. Talk to your supervisor 3. Do nothing 4. All of the above | | b) talk to your supervisor |  |
| PC1.3, KE1 | If you had a lot of job tasks for that day to complete and your supervisor gave you one that you couldn’t complete, what would you say to your supervisor? | | It’s okay if you don’t want to upset anyone but only agree to deadlines that you can handle. If your to-do list is already full and you receive a request to complete an additional task on the same day, decline it- suggested wording could include – “I already have X to do and cannot complete that and the new task today – is it OK to finish tomorrow or did you want to get someone else to do this?”. |  |
| Assessment result | | Satisfactory  Not Satisfactory | | | |
| Resubmission req’d? | | Yes  No | | | |
| Resubmission notes | |  | | | |
| Feedback to candidate | |  | | | |
| Assessor name | |  | | | |
| Assessor signature | |  | | | |
| Candidate signature | |  | | | |

**APPENDIX 3 – BSBPEF202 ASSESSMENT PLAN**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Unit of competency | | | BSBPEF202 Plan and apply time management | | | | | |
| 2. Target group summary | | | The unit applies to individuals working under direct supervision. These individuals apply basic skills and knowledge in a broad range of work settings. They are typically 16-20 year olds with no work experience looking to enter the workforce or commencing traineeships / school based VET courses. They may also be mature age entering the workforce for the first time. | | | | | |
| 3. Purpose and context/s of the assessment | | | This unit describes how to implement time management processes to organise and complete work tasks. It also addresses skills and knowledge to seek and review feedback for performance improvement regarding time management and use technology appropriate to the task.  The unit applies to individuals working under direct supervision. These individuals apply basic skills and knowledge in a broad range of work settings.  This assessment can be completed in a classroom, workplace, or independent learning environment. | | | | | |
| 4. ASSESSMENT MAPPING | | | | | | | | |
| Matrix key | | | QUES: Questioning (Written or Verbal) PROD: Production of an Item  PORT: Portfolio of Documents OBSV: Observation  THRD: Third-party observation | | | | | |
| Unit of competency criteria | | | | Assessment instruments | | | | |
| Type[[4]](#footnote-4) | Ref[[5]](#footnote-5) | Criteria text | | QUES | PROD | PORT | OBSV | THRD |
| PE | PE1 | The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to: develop and implement at least one time management plan with support of relevant personnel. | |  | X |  |  |  |
| PE2 | In the course of the above (developing and implementing one time management plan), the candidate must: complete each work task within specified timeframe, seeking opportunities to use digital tools where applicable | |  | X |  |  |  |
| PE3 | In the course of the above (developing and implementing one time management plan), the candidate must: seek and use feedback from others to monitor and improve work performance. | |  | X |  | X |  |
| PC | 1.1 | Discuss and agree on work goals and plans with assistance from relevant personnel | |  | X |  | X |  |
| 1.2 | Identify relationship between own work goals and plans, and organisational goals and plans | |  |  |  | X |  |
| 1.3 | Research time management techniques and strategies | | X |  |  |  |  |
| 1.4 | Plan and prioritise work tasks within allocated timeframes | |  | X |  |  |  |
| 2.1 | Perform tasks according to designated timelines and instructions | |  | X |  |  |  |
| 2.2 | Seek assistance from colleagues when difficulties arise in achieving allocated tasks | | X |  |  |  |  |
| 2.3 | Identify factors affecting work plan | |  | X |  | X |  |
| 2.4 | Communicate progress on work plan to relevant personnel according to organisational policies and procedures | |  |  |  | X |  |
| 3.1 | Seek feedback on time management from relevant personnel | |  | X |  | X |  |
| 3.2 | Record changes to time management approach according to task instructions | |  | X |  |  |  |
| 3.3 | Identify and plan opportunities for improvement in discussion with colleagues | |  |  |  | X |  |
| KE | KE1 | time management techniques and strategies | | X | X |  |  |  |
| KE2 | features of a time management plan | | X |  |  |  |  |
| KE3 | organisational standards, policies and procedures relevant to own work role | |  | X |  |  |  |
| KE4 | relationship between own work goals and plans and organisation’s goals and plans | |  |  |  | X |  |
| KE5 | factors affecting work progress and performance improvement techniques | |  | X |  |  |  |
| FS[[6]](#footnote-6) | FS1 | Reading - Identifies and interprets textual information to determine and adhere to organisational and task requirements | |  | X |  |  |  |
| FS2 | Writing - Completes required documents using organisational formats | |  | X |  |  |  |
| FS3.1 | Oral communication - Uses listening and questioning techniques to seek information and confirm understanding | |  |  |  | X |  |
| FS3.2 | Oral communication - Participates in verbal interactions using language and features suitable to audience and context | |  |  |  | X |  |
| FS4 | Numeracy - Interprets numerical information related to timeframes | |  | X |  |  |  |
| FS5 | Enterprise and initiative - Complies with organisational policies, procedures and standards | |  | X |  |  |  |
| FS6.1 | Planning and organising - Prioritises work and completes activities within designated timeframes | |  | X |  |  |  |
| FS6.2 | Planning and organising - Identifies and solves routine problems | |  | X |  |  |  |
| FS7 | Selects appropriate digital tools to complete tasks | |  | X |  |  |  |
| 5A. Assessment methods and instruments – describe how and when they will be applied | | | Production of an item – required to produce a time management plan, review this with an appropriate person and monitor progress using this plan  Observation – once they have submitted their finished Production of an Item (time management plan) the assessor will observe their oral communication skills whilst also demonstrating their ability to review their plan and performance  Questions – these are some underpinning knowledge questions and can be completed in writing and submitted at any time during the process (including orally during the Observation)  The assessment should be given at the end of the training.  The production of an item they should be given a minimum of 5 days (typically 3-4 weeks) to complete, the observation and questions should typically take 30 minutes each to complete, the observation is conducted once they have finished the production of an item task 9the questions can be completed at any stage). | | | | | |
| 5B. Location | | | Workplace  Classroom  Simulated workplace  Other – specify: | | | | | |
| 6. Applicable  industry or workplace standards or requirements | | | At a minimum the assessment outlines applicable industry/workplace requirements for documentation (legible, clear, spelling and grammar appropriate) and oral communication skills (clear, polite, positive) | | | | | |
| 7. Relevant assessment conditions (from unit) | | | Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.  This includes access to challenges and situations to demonstrate application of performance evidence.  Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards. | | | | | |
| 8. Reasonable adjustments | | | Some of the assessment tasks in the candidate assessment kit can be completed in a simulated, real workplace or independent learning environment. Where indicated, candidates may opt for any of these approaches without disadvantage. All other reasonable adjustments must be approved by the RTO manager | | | | | |
| 9. Contextualisation guidelines provided by the training package author.[[7]](#footnote-7) | | | **Health and safety implications in the industry**  Work health and safety (WHS) requirements are covered either by:  • embedding requirements in the elements/performance criteria of units of competency  • including specific WHS units in qualifications.  In jurisdictions where model WHS laws have not been implemented, RTOs are advised to contextualise units of competency by referring to the existing WHS legislative requirements.  **Contextualisation of units of competency by RTOs**  RTOs may contextualise units of competency to reflect local skill needs. Contextualisation could involve  additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, or specific enterprise requirements. Any contextualisation must ensure the integrity of the outcome of the unit of competency is maintained.  Industry requirements, as described in training or job specifications, can be used to contextualise a unit of competency  BSB CVIG (Business Services Training Package Companion Volume Implementation Guide) Version 7.1 | | | | | |
| 10. Recognition of prior learning (RPL): What modifications to the tools (if any) are necessary for the following recognition scenarios. Will the assessment tool be modified or adapted for RCC / RPL candidates? If so, how? | | | | | | | | |
| 10A. Candidates who claim to have already completed this unit at another RTO | | | Where candidate have already completed this unit through another RTO, authenticate the unit with the  issuing RTO and credit this unit (no additional assessment will be required) | | | | | |
| 10B. Candidates who claim to possess all competencies within the unit of competency but have not completed this unit at another RTO. | | | For RPL, the candidate can replace completed examples with those from their own workplace. Then where there are gaps a third-party report can be obtained or additional questions and evidence required | | | | | |
| 11. Resources for Assessor | | | 1. Assessment instrument #1: Production of an item  2. Time management plan template  3. Assessment instrument #2: Observation instrument  4. Assessment instrument #3: Question instrument (Markers Guide)  5. Record of assessment outcome | | | | | |
| 12. Resources for Candidates | | | 1. Assessment instrument #1: Production of an item  2. Time management plan template  3. Assessment instrument #2: Observation instrument  4. Assessment instrument #3: Question instrument | | | | | |
| 13. Author name | | | (Plenty Training Academic Manager) | | | | | |
| 14. Author date | | | 20/09/2021 | | | | | |

1. This can be either a date or a time – depending on the task and the period over which the plan runs, make sure this is clear in your answer [↑](#footnote-ref-1)
2. For example do you have a job description, are the SOP’s you must follow, are there legal requirements you must comply with? [↑](#footnote-ref-2)
3. Some examples of problems could be a previous task taking longer than expected, internet or another resource being unavailable, new tasks being added [↑](#footnote-ref-3)
4. For example, performance evidence (PE), critical aspects of assessment (CAA), performance criterion (PC), etc. [↑](#footnote-ref-4)
5. For example, *KE1, PE2,* etc. [↑](#footnote-ref-5)
6. Foundation skills (FS) must be listed and must be assessed if not already implicitly assessed by the associated performance criteria (PC). [↑](#footnote-ref-6)
7. Refer to the companion volume / implementation guides linked from each unit of competency at training.gov.au. [↑](#footnote-ref-7)