



BSBPEF502

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Develop and use emotional intelligence

Assessment 2 of 2

Project



Assessment Instructions

Task overview

This assessment task is divided into three (3) parts.

- Part A: Emotional Intelligence Policy and Procedure development
- Part B: Emotional Intelligence self-assessment
- Part C: Development of emotional intelligence in others

Read each task carefully before capturing your response in the format indicated.

Additional resources and supporting documents

To complete this assessment, you will need:

- Emotional Intelligence Policy and Procedure

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

For this assessment, you will be performing in the role of a Human Resources Officer working at Complete Business Solutions Australia (CBSA), a business consulting firm. You are presented with scenarios where you will engage in activities to support employees and management in relation to the organisation's emotional intelligence policy and procedures.

The scenarios and instructions below aim to provide you with the opportunity to demonstrate the appropriate skills and knowledge needed to develop and promote emotional intelligence in yourself and others.

Part A: Emotional Intelligence Policy and Procedure development



To: HR Officer (HR.Officer@cbsa.com.au)
From: Glenda Williams (glenda.williams@cbsa.com.au)
Date/time: Monday 9:18 a.m.
Subject: Emotional Intelligence
Attachment: Emotional Intelligence Policy and Procedures.pdf

Good Morning,

Emotional intelligence is an important skill for building positive wellbeing in the workplace, primarily because it helps staff to manage their response to stressful situations.

This is achieved through an awareness of our emotions and those of the people around us. Through this awareness we can better identify and respond to stressors, understand and support others and communicate effectively.

In order to introduce our emotional intelligence initiative, we need to develop a policy and procedure document outlining what it is and how we plan to use it. I have started pulling this together but it still has some gaps.

Can you please have a look at the Emotional Intelligence Policy and Procedure document attached and complete the following sections:

- POLICY 1.2 Emotional stressors in the workplace
 - Identify some key emotional stressors in the workplace
- PROCEDURES 2.2.1 Responding to emotional stressors
 - Analyse the key emotional stressors identified above (POLICY 1.2)
 - Suggest some methods to manage (minimise or remove) these stressor
- PROCEDURES 2.2.3 Emotional expression
 - Outline a plan (process) for identifying and navigating situations where a range of emotional expressions may be experienced
- PROCEDURES 3.1 Understanding the effects of personal behaviour and emotions on others
 - Identify some tasks to assist others in understanding the effects of personal behaviour and emotions on others in the workplace
- PROCEDURES 3.2 Opportunities to express thoughts and feelings
 - Identify some opportunities for expressing emotions and feelings in the workplace

Once you have completed this update, can you please email me a copy of the policy document for review - I am particularly interested in seeing what methods you identify for responding to emotional

stressors in the workplace as this will most likely have the biggest practical impact in helping our staff navigate their social interactions.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

<http://www.cbsa.com.au>



ATTACHMENTS

- **Emotional Intelligence Policy and Procedures**

Refer to document link: Emotional Intelligence Policy and Procedures

Task 1: Emotional stressors in the workplace

Review the attached Emotional Intelligence Policy and Procedure document and complete section **POLICY 1.2 Emotional stressors in the workplace**.

Identify three (3) key emotional stressors in the workplace, capturing them in the space provided within the policy document.

[Approximate word range: 2-7 words per stressor]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must identify three (3) key workplace stressors.

Sample answers are provided below – students must provide three (3) answers only. Students' answers may vary, but must identify stress that is commonly caused in a work environment.

- *Heavy workload*
- *Long hours*
- *Unreasonable demands/deadlines*
- *Lack of support/poor leadership*
- *Conflict with team members/manager*
- *Insufficient tools/systems to perform the job*
- *Insufficient training*
- *Job insecurity*

Task 2: Responding to emotional stressors

Review the attached Emotional Intelligence Policy and Procedure document and complete section **PROCEDURE 2.2.1 Responding to emotional stressors**.

Review the key emotional stressors identified in Task 1 (*Emotional stressors in the workplace*) and provide the following for each:

- the cause of the stressor

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- the impact of the stressor
- a method to address (minimise or eliminate) the stressor

Capture the three (3) stressors, analysis of causes and impacts and the method to manage them in the space provided within the policy document.

[Approximate word range: 40-80 words per stressor]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must capture three (3) methods for managing workplace stressors. Students must reflect analysis and solutions based on the stressors they identified in POLICY 1.2 Emotional stressors in the workplace.

Sample answers are provided below – students must provide three (3) answers only. Students' answers may vary, but must capture the stressor, identify the cause and impact and suggest a method to minimise or eliminate the stressor.

Stressors	Methods	
<i>Heavy workload/ unreasonable demands/ deadlines</i>	Cause	<i>Team under resourced or overcommitting to deliverables</i>
	Impact	<i>Creates pressure to deliver</i>
	Method	<i>Ask for help/get some support – Reach out to others to help with tasks as appropriate. This may involve bringing someone else in or contracting elements out.</i> <i>OR</i> <i>Set boundaries – Set times that you are available and stick to them, clarify what you are able/willing to get done realistically and stick to that deliverable.</i>
<i>Long hours</i>	Cause	<i>Poor organisation skills</i>
	Impact	<i>Confusion and missed deadlines</i>
	Method	<i>Clear planning – By taking time up front to plan out tasks and timelines, it can be easier to manage delivery within the timeline, or identify issues (too much work) that can be escalated/managed.</i>
<i>Conflict with team members/manager</i>	Cause	<i>Differing priorities/demands</i>
	Impact	<i>Creates tension and resistance to support each other</i>
	Method	<i>Talk to team member/manager – Let them know your priorities and ask them to clarify theirs to see if a mutually beneficial solution can be found.</i>
<i>Insufficient tools/systems to perform the job</i>	Cause	<i>Poor planning</i>
	Impact	<i>Inefficiencies and delays with delivery – takes longer to achieve the same outcome</i>

	Method	<i>Talk to management – Let them know the conditions you are working under and the impact. Work with them to identify and implement efficiencies where available.</i>
<i>Burn out</i>	Cause	<i>Prolonged period of working too hard (long hours, pressurised deadlines, no breaks etc.)</i>
	Impact	<i>Can create physical symptoms such as headaches and lowered immunity/ susceptibility to illness.</i>
	Method	<i>Schedule time to recharge/look after yourself – Make time to step away from work and do something for you. This will help to create some balance and may even help you to put your work stress into perspective.</i> <i>OR</i> <i>Track your stressors – By tracking your stressors, you can develop a plan for how to respond to/overcome/address them when they occur in the future.</i>

Task 3: Emotional expression [Range]

a: Review the attached Emotional Intelligence Policy and Procedure document and complete section **PROCEDURE 2.2.3 Emotional expression [Range]**.

Outline a three [3] step plan for identifying and navigating situations where staff may experience a range of emotional expressions. For each step in the plan, include a key question to consider in order to support completion of the step.

Capture the three [3] step plan and supporting questions in the space provided within the policy document.

[Approximate word range: 10-20 words per step]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must briefly describe the three [3] steps to identify and respond to emotional expressions in the workplace, and a question to support delivery of each step.

Students' answers must capture the steps and questions outlined.

1.	<i>Identify the emotional expression</i>	<i>What is the emotion that is being displayed?</i>
2.	<i>Apply reason to emotion</i>	<i>What is the underlying cause of the emotion?</i>
3.	<i>Respond to emotional expression</i>	<i>How can you best neutralise the emotion and redirect to the task at hand?</i>

b: Read the case study and complete the task below.

Case Study

You are holding a one-on-one meeting with Alex, a CBSA Business Consultant who reports to you. During Alex's status update, as he was talking about missing an unreasonable deadline that the client had set for stage one of a large project, he starts to talk louder and faster. His tone changes and he starts to complain about the client rather than provide details on his delivery timeline.

Using the plan for identifying and navigating situations where staff may experience a range of emotional expressions captured in Part A Task 3, review and apply this plan to the case study by answering each of the plan questions.

Capture your answer in the space provided below.

[Approximate word count: 75 words in total]

STEP	APPLIED TO CASE STUDY: Alex (CBSA Business Consultant)
1.	
2.	
3.	

ASSESSOR INSTRUCTIONS: Students must capture the plan as set out in the case study. Students' answers must reflect the details as set out in the sample answers below.

NOTE: Step 3 response must cover both validation/acknowledgement of the emotional response and resolution of the problem/cause outlined in the case study.

1. Identify the emotional expression – What is the emotion that is being displayed? *Anger/frustration*
2. Apply reason to emotion – What is the underlying cause of the emotion? *Being given an unreasonable/unachievable timeframe*
3. Respond to emotional expression – How can you best neutralise the emotion and redirect to the task at hand? *Validate Alex's anger/frustration "it can be quite stressful when someone sets unreasonable expectations", agree a new reasonable timeframe for the current task "when do you think you can deliver against the current task?", a plan to update the client, agree how to stop it from happening/set client expectations for the future and check that Alex understands and is comfortable with the plan going forward.*

C: Read the case study and complete the task below.

Case Study

You have met with Alex above and agree that the timeframes for stage one of a large project as provided by the client (Jae) and agreed by the CBSA Project Manager (Ash) are not realistic. This is only stage one of the project and stage two and three still need to be planned out.

You meet with Jae and Ash to update them and they do not respond well.

It turns out Jae was two-weeks late in briefing CBSA on the work and was pushing to meet the original deadline so as not to have to let her Manager know that she dropped the ball. So when told that the deadline will not be met she starts to go pink in the face and stammer her words. She is insistent that this is all Alex's fault for not working faster and Ash's fault for not raising issues with the timeline during the project scope process, insisting that the agreed timeline be met.

While Ash has the authority to change the timeline and/or resources applied to the project, he has his own key performance indicators that require certain client satisfaction ratings. With Jae already blaming him he is worried about unofficially accepting any responsibility by changing the timeline and upsetting Jae further which may impact his annual performance bonus, so he is defensive claiming the timeline was appropriate as he continues to agree with everything Jae says.

Using the plan for identifying and navigating situations where staff may experience a range of emotional expressions captured in Part A Task 3, review and apply this plan to the case study by answering each of the plan questions for Jae (Client) and Ash (CBSA Project Manager).

NOTE: Step 3 will be similar for both parties as the solution to be applied relates to the issue overall, however it must show elements of focus on addressing each individuals' emotions being demonstrated in the meeting.

Capture your answer in the space provided below.

[Approximate word count: 75 words in total]

STEP	APPLIED TO CASE STUDY: Jae (Client)
1.	
2.	
3.	

STEP	APPLIED TO CASE STUDY: Ash (CBSA Project Manager)
1.	
2.	
3.	

ASSESSOR INSTRUCTIONS: Students must capture the plan as set out in the case study for both Jae (Client) and Ash (CBSA Project Manager). Students' answers must reflect the details as set out in the sample answers below.

NOTE: Step 3 response must cover both validation/acknowledgment of the emotional response and resolution of the problem/cause outlined in the case study.

NOTE: Step 3 will be similar for both parties however must include specific elements to address the emotions of each party [see underline in sample answers].

JAE (Client)

1. Identify the emotional expression – What is the emotion that is being displayed? *Worry, fear and blaming.*
2. Apply reason to emotion – What is the underlying cause of the emotion? *Worried that she will be "found out" by her manager, fear of getting in trouble and blaming to try and get out of trouble.*
3. Respond to emotional expression – How can you best neutralise the emotion and redirect to the task at hand? *Acknowledge that this issue should have been raised by CBSA during the projects scoping by CBSA. Reiterate calmly and clearly that the deadline is not achievable so a solution needs to be found. Suggest that some of this time be made up in stage two and or three of the project through increased resourcing as a way of staying on track with the larger project so Jae can save face with her manager. Agree a plan to involve yourself and the Business Consultants in future planning to ensure it doesn't happen again.*

ASH (CBSA Project Manager)

1. Identify the emotional expression – What is the emotion that is being displayed? *Fear and defensive.*

2. Apply reason to emotion – What is the underlying cause of the emotion? *Worried there will be negative financial implications (client satisfaction/performance bonus). Defensive of the initial timeline as to accept a change would be to accept responsibility/agree it was wrong.*
3. Respond to emotional expression – How can you best neutralise the emotion and redirect to the task at hand? *Agree that this should have been raised during the projects scoping process. Reiterate calmly and clearly that the deadline is not achievable so a solution needs to be found. Suggest that some of this time be made up in stage two and or three of the project through increased resourcing as a way of staying on track with the larger project so Ash can save face with the client. Clarify that you are not blaming him, but are interested in moving forward so you need to agree to involving yourself and the Business Consultants in future planning to provide Ash additional insight (support) to ensure it doesn't happen again.*

Task 4: Understanding the effects of personal behaviour and emotions on others

Review the attached Emotional Intelligence Policy and Procedure document and complete section **PROCEDURE 3.1 Understanding the effect of personal behaviour and emotions in others.**

Identify and briefly describe three (3) tasks or activities to help staff understand the effects of their personal behaviour and emotions on others, capturing them in the space provided within the policy document. These effects can be positive or negative but must direct staff to consider the impacts of their behaviour and emotion on others and be applied to the work environment.

NOTE: One (1) example activity is already included – you must add three (3) more.

[Approximate word range: 45-90 words per task]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must identify three (3) tasks or activities to help staff understand the effects of their personal behaviour and emotions on others.

Sample answers are provided below – Students are provided with one (1) answer already (all staff-quiz), however must provide three (3) additional answers only. Students' answers may vary, but must identify tasks or activities that staff can do in the context of the workplace that will direct them to consider the impacts of their behaviour and emotions on others. These can be positive or negative.

Task/ activity		Brief description
*	Self-assessment	<p>Complete the “Self-Assessment Form” found at Appendix A.</p> <p>Complete a process of self-reflection against set emotional intelligence criteria with a focus on critically evaluating your behaviour and emotions in certain circumstances.</p> <p>Identify areas of strength and weakness.</p> <p>Consider how your behaviour and emotions in the scenario impacted others and the overall outcome and draw your strengths and weaknesses from this.</p> <p>Use this information to understand your emotional triggers and form the basis of your areas for improvement.</p>
*	Complete quiz (Example provided)	Complete the all-staff quiz called “Understanding the effects of our behaviours and emotions” found at Appendix B.

		Review the scenarios provided, consider the emotions of the key character and how they behaved in the interaction. Then consider and identify how this has most likely impacted those around them.
1.	<i>Self-reflection</i>	<p><i>Record a meeting or interaction where a passionate topic/task was discussed. Review the recording and recall any strong emotions you felt during the session.</i></p> <p><i>When you experienced these, how did you behave? What was your body language? What was your language and tone like?</i></p> <p><i>Now look at how others in the session responded in relation to your comments, behaviour and emotions. Did their posture change? Did their language or tone change? Did they seem to display any emotions of their own?</i></p>
2.	<i>Seek formal feedback</i>	<p><i>Ask a mentor, manager or peer to meet with you to discuss the impacts of your personal behaviour and emotions in relation to a specific experience.</i></p> <p><i>Discuss the emotions you felt during the experience, your resulting behaviour and how this may have impacted others.</i></p> <p><i>Ask them for their point of view on how the same scenario played out and was received/perceived by others.</i></p>
3.	<i>Workshop</i>	<p><i>Run a workshop with the team where a scenario is provided and played out by team members. Then work together to review and discuss the key behaviours and emotions demonstrated in the role play and the effect these had on others in the role play.</i></p> <p><i>Another answers may be:</i></p> <p><i>Regular feedback: Incorporate a component of emotional intelligence review into regular manager/staff 1:1 catch ups based on current work activity and pressures.</i></p> <p><i>Discuss any areas of concern or high emotion, related interactions, behaviours witnessed, underlying emotions and the impact that this has had on others involved. Capture or reference all impacts that have been flagged or escalated by others where appropriate.</i></p>

Task 5: Opportunities to express thoughts and feelings

Review the attached Emotional Intelligence Policy and Procedure document and complete section **PROCEDURE 3.2 Opportunities to express thoughts and feelings.**

Identify three (3) opportunities for individuals to express their thoughts and feelings in the workplace, capturing them in the space provided within the policy document. These can be formal or informal, but must reflect a safe and professional environment for this type of discussion.

[Approximate word range: 10-20 words per opportunity]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must identify three (3) opportunities available to allow others to express their thoughts and feelings in the workplace.

Sample answers are provided below – Students must provide three (3) answers only. Students' answers may vary, but must reflect a safe and professional environment for this type of discussion.

1.	<i>Direct staff to the Employee Assistance Program (EAP) so that they can obtain counselling from qualified professionals.</i>
2.	<i>Create an open-door policy/open environment so workers can come to you with any issues.</i>
3.	<p><i>Conduct team building exercises or workshops aimed at openly sharing thoughts and feelings across the team.</i></p> <p><i>Other answers may include:</i></p> <ul style="list-style-type: none"> - <i>Conduct an employee satisfaction/pulse survey to capture staff's thoughts, feelings, and experiences</i> - <i>Develop a mentor program that incorporates a safe space for discussion around individuals' thoughts and feelings.</i>


Task 6: Email requesting feedback

Send an email to Glenda Williams requesting she review and approve the updated Emotional Intelligence Policy and Procedure document.

Direct Glenda to the sections completed in line with her original email and ask her to provide specific feedback in line with the methods you identified for responding to emotional stressors in the workplace.

Submit this using the template below and attach the updated documents (reference it in the attachments and the content of the message).

[Approximate word count: 50 words in email content]

 <p style="text-align: right;">Email Template</p>	
To:	<<Add name(s) and position title of main email recipients here>>
From:	<<Add your name and position title here>>
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>

To <<Add email recipient(s) name here>>,
<<Add message here. Add as much space as necessary.>>

Kind regards

<<Add your name here>>




<<Add your job position here>>
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
<http://www.cbsa.com.au>

Assessor instructions: Students must prepare an email to send to the Human Resources Manager using the Email Template.

The email must specify:

- the email be delivered to Glenda Williams
- the email is from themselves in the role of HR Officer
- the date and time that they sent the email
- a relevant subject [such as Emotional Intelligence Policy and Procedure]
- the reason for the email [such as: please find attached updated policy and procedure document... please provide feedback on the methods for responding to emotional stressors included...]
- the attachments must be included [Updated Emotional Intelligence Policy and Procedure]
- student must specify their job position that they are role playing [Human Resources Officer].

A sample answer is provided below. however alternative answers are acceptable as long as they address the assessor instructions above.

 Email Template	
To:	<i>Glenda Williams (HR Manager)</i>
From:	<i><<Students name and position title here>></i>
CC:	
Date/time:	<i><<Add any time and date of the email here>></i>
Subject:	<i>Emotional Intelligence Policy and Procedure</i>
Attachments:	<i>Emotional Intelligence Policy and Procedure.pdf</i>
<i>To Glenda,</i>	
<i>I have reviewed and updated the Emotional Intelligence Policy and Procedure as requested.</i>	

Can you please review updates including:

- POLICY 1.2 Emotional stressors in the workplace
- PROCEDURES 2.2.1 Responding to emotional stressors
- PROCEDURES 2.2.3 Emotional expression [range]
- PROCEDURES 3.1 Understanding the effect of personal behaviour and emotions on others
- PROCEDURES 3.2 Opportunities to express thoughts and feelings

In particular I would appreciate your feedback on the methods I identified for responding to emotional stressors in the workplace.

Kind regards

<<Students Name>>



HR Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

<http://www.cbsa.com.au>

Part B: Emotion Intelligence self-assessment



To: HR Officer (HR.Officer@cbsa.com.au)
From: Glenda Williams (glenda.williams@cbsa.com.au)
Date/time: Thursday 12:19 p.m.
Subject: Emotional Intelligence – self assessment
Attachment: Emotional Intelligence Policy and Procedures.pdf

Good afternoon,

Thank you for the work you completed on the Emotional Intelligence Policy and Procedure document.

In particular I was happy with the methods for responding to emotional stressors you identified in procedure section 2.2.1.

As the next piece towards finalising this process, I included some information on conducting an emotional intelligence self-assessment in the policy and procedure [Procedure 1. Assessing your emotional intelligence]. This is split into two parts and should capture a personal assessment, as well as application of a formal emotional intelligence evaluation tool for consideration.

Before we launch this policy wider, I was hoping we could do a test run through of the process with you. This would involve the following steps:

1. Developing evaluation criteria for assessing your emotional strengths and weaknesses

2. Assessing your emotional strengths and weaknesses (a self-assessment and using the evaluation tool)
3. A consultation to identify and discuss areas for improvement of your own emotional intelligence

If you could make time to do the first two steps and then we can meet to complete the third step together, that would be great.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

<http://www.cbsa.com.au>



ATTACHMENTS

- **Emotional Intelligence Policy and Procedures**

Refer to document link in Part A: Emotional Intelligence Policy and Procedures

Task 1: Develop evaluation criteria

Access the *Emotional Intelligence Policy and Procedure* document [continued from Part A of this assessment].

Procedure section *1. Assessing your emotional intelligence*, section *1.1 Self-Assessment* outlines the process for setting meaningful evaluation criteria. Review this section and then access the *Self Assessment Form* found at Appendix A.

In the spaces provided within the template in the appendix, fill in your name, position title and the date. Then determine and complete the following sections:

- *Evaluation Criteria 1* including the *Emotional Intelligence element* and the *evaluation criteria* [statement] you are assessing yourself against.
- *Evaluation Criteria 2* including the *Emotional Intelligence element* and the *evaluation criteria* [statement] you are assessing yourself against.

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

A completed form is included below [with Part B Task 2b] with full assessment instructions and sample answers for each.

Task 2: Complete self-assessment

Access the *Emotional Intelligence Policy and Procedure* document.

a: Procedure section *1. Assessing your emotional intelligence*, section *1.1 Self-Assessment* outlines the benefits and considerations for completing a self-assessment of your emotional intelligence. Review this section and then access the *Self Assessment Form* found at Appendix A.

In the spaces provided within the template in the appendix, complete the following sections:

- *Strengths* for each of the Evaluation Criteria you set, including an *example* and your *self-assessment* of how this meets your evaluation criteria statement.
- *Weaknesses* for each of the Evaluation Criteria you set, including an *example* and your *self-assessment* of how this does not meet your evaluation criteria statement.
- *Area for improvement* for each of the Evaluation Criteria you set based on any weaknesses identified. Include at least one (1) *personal emotional trigger* that has impacted your self-assessment and one (1) *area for improvement*.

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

A completed form is included below (with Part B Task 2b) with full assessment instructions and sample answers for each.

b: Procedure section *1. Assessing your emotional intelligence*, section *1.2 EI Evaluation Tools* outlines the evaluation criteria and test tool for a formal Emotional Intelligence evaluation tool. Review this section and then complete the formal Emotional Intelligence evaluation tool using the link provided in the policy document (section 1.2.2 and in the template at Appendix A).

Once completed, access the *Self Assessment Form* found at Appendix A.

In the spaces provided within the template in the appendix, complete the following sections of the *External Evaluation Tool*:

- *Outcome* to capture a screen shot of your external evaluation tool outcomes. This is a table with the results of each evaluation element out of 10, based on the answers you provided in the test.
- *Analysis of results* for one (1) EI element includes identifying the EI element and then comparing your personal assessment of your strengths and weaknesses against that element, against your results in the external evaluation tool. Provide a brief outline of the outcomes of the two (2) assessment types and then a short comment on whether the results are aligned or different and a reason for why this is the case. NOTE: The self-assessment and external evaluation tool may not identify the same strengths and weaknesses - they are both just tools to facilitate self-reflection.

ASSESSOR INSTRUCTIONS: THE ANSWER FOR PART B Task 1, 2a and 2b ARE CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT, APPENDIX A, SELF ASSESSMENT FORM.

Students must complete the form as included below with full assessment instructions and sample answers for each.

SELF-ASSESSMENT FORM	
<p>Students must identify two (2) evaluation criteria by EI element, then complete a self-assessment identifying a strength and a weakness, providing an example for each. They are then to complete an external evaluation and compare the results.</p> <p>A sample answer for each section is captured by strength and weakness below. Students' answers will be unique but must address the assessor instruction components captured in the sections below.</p>	
Name:	<<Student name>>
Position Title:	<<Position Title>>
Date:	<<Date of evaluation>>

Purpose of self-assessment:	Assess emotional strengths and weaknesses against evaluation criteria.	
Evaluation Criteria 1 Identify the evaluation criteria [statement] you are assessing yourself against. Include the Emotional Intelligence [EI] element that this statement relates to.		
EI Element (2 words)	Assessor Instructions: Students must include one EI element that forms the basis of their evaluation criteria. The EI elements must be one of the following options: <ul style="list-style-type: none">- <i>Self-awareness</i>- <i>Self-management</i>- <i>Social awareness</i>- <i>Relationship management</i>	
Evaluation Criteria (Word range: 10-20 words)	Assessor Instructions: Students must identify an evaluation criteria or benchmark statement to assess themselves against in relation to the EI element identified above. The evaluation criteria must be relevant [reflect correct/best practice way of doing things] and effective [support them in achieving their goals]. Sample answers are provided below (see Sample Answer section). Alternative answers are acceptable, but they must meet the criteria set out in the Assessor Instructions above. Students must only capture one [1] evaluation criteria in this space for assessment.	
Strengths Document assessment of your strengths against the evaluation criteria above. Provide at least one example of an interaction with a co-worker, identifying your emotions and the emotions of others during the scenario to support your assessment.		
Example (Word range: 70-110 words)	Scenario	Assessor Instructions: Students must provide an example of an interaction that reflects them showing strength in relation to their chosen evaluation criteria.
	Your emotions	Students must include identification of their emotions and the emotions of others during the scenario provided.
	Emotions of others	Sample answers are provided below. Alternative answers are acceptable but must represent a positive example of them demonstrating strength in their emotional response as related to the evaluation criteria identified and include the identification of the emotions of themselves and others involved in the scenario.
Self-assessment (Word range: 50-70 words)	Assessor Instructions: Students must complete a self-assessment of their strengths in relation to their chosen evaluation criteria. Students must consider their emotions and the emotions of others as identified in the scenario as part of their self-assessment. Sample answers are provided below. Alternative answers are acceptable but must reflect an appropriate self-assessment (strength) for an individual based on the evaluation criteria, example and emotions of all parties as presented.	
STRENGTH SAMPLE ANSWERS	EVALUATION CRITERIA: <i>I am able to identify my emotions in order to understand how they impact my behaviour [Self-awareness]</i> EXAMPLE:	

SCENARIO: I was asked to run some analysis on my teams sales recently and as I felt that this was not part of my job I was reluctant to do the work. This was because I resented being asked to do someone else's work.

The analyst who normally completes this work was on extended sick leave so there was no one else to do it. Once I realised there was no appropriate alternative, I was less resentful and was actually able to get the task done quickly.

YOUR EMOTIONS: Frustration/anger

EMOTIONS OF OTHERS: Frustration/disappointment/stress

SELF ASSESSMENT: By recognising my emotion [resentful] and the impact it was having on my behaviour [reluctance] I was able to remove my emotion from the task at hand and came to realise the underlying and unbiased business need.

This made me feel less resentful and I was able to complete the task successfully.

EVALUATION CRITERIA: I am able to control my impulsive feelings and behaviours [Self-management]

EXAMPLE:

SCENARIO: In my product management meeting the other week, a client misquoted me saying I had agreed to changing the teams project timeline, despite me explicitly disagreeing with the proposed change as it was unachievable/unreasonable. This made me quite angry and as they pushed on saying that I was "wrong", I got angrier and angrier.

Realising this was not the correct forum [multiple clients were in the meeting] to clear up the issue I stated that this was not my understanding and that I was happy to meet offline to discuss our previous agreement [which was in the last meetings minutes] and next steps.

YOUR EMOTIONS: Anger/resentment

EMOTIONS OF OTHERS: Confusion/embarrassed/anger

SELF ASSESSMENT: By controlling my anger I was able to stay calm in the meeting, saving face with our other clients and minimise the impact of the disruptive client on others.

I was also able to then meet separately with the client where I could show them what had previously been agreed and they were happy to continue with that.

EVALUATION CRITERIA: I have and am able to demonstrate empathy for others [Social awareness]

EXAMPLE:

SCENARIO: A team member came to me with concerns regarding their ability to achieve the current tasks timeline. During the conversation I was able to determine that they had a sick child and would need to take unplanned leave which is why they were unlikely to meet the deliverable.

I understood that this was likely to be creating more stress for the team member who was already quite upset at having a sick child so I spoke to

them about what extra time and/or support they needed. By allowing them to have three extra days to complete the work they felt it was much more achievable, so the timeline was updated as such.

YOUR EMOTIONS: Worry/concern/empathy

EMOTIONS OF OTHERS: Scared/embarrassed/stressed

SELF ASSESSMENT: *By considering the pressure I would feel in the same circumstances I could appreciate the team members stress and worry.*

By discussing what felt more achievable and allocating this additional time they were relieved that their work was no longer a pressure so they could take the time needed with their child and then complete the task.

EVALUATION CRITERIA: *I communicate clearly using a range of methods appropriate to my audience (Relationship management)*

EXAMPLE:

SCENARIO: *While communicating project deliverables recently, I received questions from multiple stakeholders asking me to clarify the details relating to the scope and timeline.*

I set up a project team meeting and spoke them to identify the gaps and clarify the details required.

I then updated all relevant documentation with any missing or unclear information addressed and recirculated the project deliverables document, asking for confirmation/feedback from all stakeholders to ensure that everyone understood the details.

YOUR EMOTIONS: Frustration/stress

EMOTIONS OF OTHERS: Confusion

SELF ASSESSMENT: *My initial communication received follow up queries so I made time to discuss the details with those impacted directly in order to understand any gaps in my communication which I then addressed both in my conversation and then again by updating and recirculating the documentation.*

I asked for additional feedback/queries should anyone have any to ensure that the new documentation was now clear.

Weaknesses

Document assessment of your weaknesses against the evaluation criteria above.

Provide at least one example of an interaction with a co-worker, identifying your emotions and the emotions of others during the scenario to support your self-assessment.

Example
[Word range: 70-110 words]

Scenario

Your emotions

Emotions of others

Assessor Instructions: Students must provide an example of an interaction that reflects them showing weakness in relation to their chosen evaluation criteria.

Students must include identification of their emotions and the emotions of others during the scenario provided.

Sample answers are provided below. Alternative answers are acceptable but must represent a negative example of them demonstrating weakness in their emotional response as related to the evaluation criteria identified and include the identification

		of the emotions of themselves and others involved in the scenario.
Self-assessment (Word range: 50-70 words)	<p>Assessor Instructions: Students must complete a self-assessment of their weakness in relation to their chosen evaluation criteria. Students must consider their emotions and the emotions of others as identified in the scenario as part of their self-assessment.</p> <p>Sample answers are provided below. Alternative answers are acceptable but must reflect an appropriate self-assessment (weakness) for an individual based on the evaluation criteria, example and emotions of all parties as presented.</p>	
WEAKNESS SAMPLE ANSWERS	<p>EVALUATION CRITERIA: I am able to identify my emotions in order to understand how they impact my behaviour [Self-awareness]</p> <p>EXAMPLE:</p> <p>SCENARIO: I was asked to run some analysis on my teams sales recently but I didn't feel this was my job or that I should be the one to have to do it. I was feeling quite frustrated and put upon so I did not complete the analysis as required.</p> <p>I was then in a meeting the following week where this information was needed where I advised them it was out of the scope of my role so I had not completed it. It was there I was told that the analyst who normally completes this task was on extended sick leave which is why the task had come to me, as a last resort.</p> <p>YOUR EMOTIONS: Anger/resentment</p> <p>EMOTIONS OF OTHERS: Confusion/embarrassed/anger</p> <p>SELF ASSESSMENT: By not taking the time to recognise my emotion [resentment] and the impact it was having on my behaviour [reluctance] I was not able to remove my emotion from the task at hand.</p> <p>This led to me not doing it despite the quite reasonable nature of the request and resulted in me being unprepared and embarrassed when the information was needed.</p> <p>EVALUATION CRITERIA: I am able to control my impulsive feelings and behaviours [Self-management]</p> <p>EXAMPLE:</p> <p>SCENARIO: In my product management meeting the other week, a client misquoted me saying I had agreed to changing the teams project timeline, despite me explicitly disagreeing with the proposed change as it was unachievable/unreasonable. This made me quite angry and as they pushed on saying that I was "wrong", I got angrier and angrier pushing back more and more until it was an incoherent screaming match that needed to be ended by a third-party.</p> <p>YOUR EMOTIONS: Anger/resentment</p> <p>EMOTIONS OF OTHERS: Confusion/embarrassed/anger</p>	

SELF ASSESSMENT: I lost control in the meeting which resulted in some very unprofessional and embarrassing behaviour that I will not be able to erase from attendees (peers and clients) minds.

This resulted in a very unprofessional public interaction that resolved nothing, even though I was later able to find documentation supporting my point of view. My relationship with that client cannot be repaired.

EVALUATION CRITERIA: I have and am able to demonstrate empathy for others [Social awareness]

EXAMPLE:

SCENARIO: A team member came to me with concerns regarding their ability to achieve the current tasks timeline as their child was sick and needed to attend a few medical appointments that would impact their work hours. I was so frustrated by their lack of drive to meet this deadline that I pushed back saying that if they did not make up their time/deliver, I would have no alternative but to put them on performance management.

They became so stressed about their child's illness and this additional work pressure that they ended up taking even more leave as they became unwell [migraine] with the deadline not met at all.

YOUR EMOTIONS: Worry/concern/empathy

EMOTIONS OF OTHERS: Scared/embarrassed/stressed

SELF ASSESSMENT: By not considering the pressure the employee was under from their sick child and work pressures, my response added even more pressure. This increased pressure on the employee resulted in them also becoming sick and needing additional leave creating and an even later delivery.

The relationship with this team member also suffered as they do not feel they can come to me because when they did, I did not listen. I suspect they have gone on to share this experience with others and they are also pulling back.

EVALUATION CRITERIA: I communicate clearly using a range of methods appropriate to my audience [Relationship management]

EXAMPLE:

SCENARIO: While communicating project deliverables recently, I received questions from multiple stakeholders asking me to clarify the details relating to the scope and timeline. I responded to each person individually which meant repeating myself as they could not see each others queries or my replies.

As more queries came in I was able to re-consider my original plan and even some of the versions I had clarified in the earlier questioning which created inconsistencies in my messaging.

This increased confusion and meant that from kick off the project team were not working towards the same goal.

YOUR EMOTIONS: Frustration/stress

EMOTIONS OF OTHERS: Confusion/frustration

	<p><i>SELF ASSESSMENT: My initial communication received follow up queries so I addressed them, however my replies were inconsistent and hap-hazard in nature. As more came in I honed my replies, but forgot to advise those I had answered earlier creating multiple versions of the project deliverables.</i></p> <p><i>The added disruption of addressing each set of queries separately was quite frustrating to myself and to the team members who struggled to identify the latest version of information.</i></p>
<p>Evaluation Criteria 2</p> <p>Identify the evaluation criteria [statement] you are assessing yourself against. Include the EI element that this statement relates to.</p>	
<p>EI Element [2 words]</p>	<p>Assessor instructions: As per evaluation criteria 1 and related strength and weakness analysis.</p>
<p>Evaluation Criteria [Word range: 10-20 words]</p>	
<p>Strengths</p> <p>Document assessment of your strengths against the evaluation criteria above.</p> <p>Provide at least one example of an interaction with a co-worker, identifying your emotions and the emotions of others during the scenario to support your self-assessment.</p>	
<p>Example [Word range: 70-110 words]</p>	<p>Assessor instructions: As per evaluation criteria 1 and related strength and weakness analysis.</p>
<p>Self-assessment [Word range: 50-70 words]</p>	
<p>Weaknesses</p> <p>Document assessment of your weaknesses against the evaluation criteria above.</p> <p>Provide at least one example of an interaction with a co-worker, identifying your emotions and the emotions of others during the scenario to support your self-assessment.</p>	
<p>Example [Word range: 70-110 words]</p>	<p>Assessor instructions: As per evaluation criteria 1 and related strength and weakness analysis.</p>
<p>Self-assessment [Word range: 50-70 words]</p>	
<p>Area for improvement</p> <p>Capture and reflect at least one personal emotional trigger that has impacted your self-assessment.</p> <p>Identify at least one area for improvement from the weaknesses you have identified above.</p>	

<p>Emotional trigger [Word range: 10-20 words]</p>	<p>EVALUATION CRITERIA: I am able to identify my emotions in order to understand how they impact my behaviour [Self-awareness]</p> <p>EXAMPLE:</p>
<p>Area for improvement [Word range: 30-60 words]</p>	<p>SCENARIO: I was asked to run some analysis on my teams sales recently but I didn't feel this was my job or that I should be the one to have to do it. I was feeling quite frustrated and put upon so I did not complete the analysis as required.</p> <p>I was then in a meeting the following week where this information was needed where I advised them it was out of the scope of my role so I had not completed it. It was there I was told that the analyst who normally completes this task was on extended sick leave which is why the task had come to me, as a last resort.</p> <p>YOUR EMOTIONS: Anger/resentment</p> <p>EMOTIONS OF OTHERS: Confusion/embarrassed/anger</p> <p>SELF ASSESSMENT: By not taking the time to recognise my emotion [resentfulness] and the impact it was having on my behaviour [reluctance] I was not able to remove my emotion from the task at hand.</p> <p>This led to me not doing it despite the quite reasonable nature of the request and resulted in me being unprepared and embarrassed when the information was needed.</p> <p>EMOTIONAL TRIGGER: Frustration at being asked to do someone else's work.</p> <p>AREA FOR IMPROVEMENT: By identifying my emotions, I am better able to understand and overcome them when appropriate. I also need to look at the background for why something is happening as this context can help to minimise the impact of any initial emotional response.</p> <p>EVALUATION CRITERIA: I am able to control my impulsive feelings and behaviours [Self-management]</p> <p>SCENARIO: In my product management meeting the other week, a client misquoted me saying I had agreed to changing the teams project timeline, despite me explicitly disagreeing with the proposed change as it was unachievable/unreasonable. This made me quite angry and as they pushed on saying that I was "wrong", I got angrier and angrier pushing back more and more until it was an incoherent screaming match that needed to be ended by a third-party.</p> <p>YOUR EMOTIONS: Anger/resentment</p> <p>EMOTIONS OF OTHERS: Confusion/embarrassed/anger</p> <p>SELF ASSESSMENT: I lost control in the meeting which resulted in some very unprofessional and embarrassing behaviour that I will not be able to erase from attendees [peers and clients] minds.</p> <p>This resulted in a very unprofessional public interaction that resolved nothing, even though I was later able to find documentation supporting my point of view. My relationship with that client cannot be repaired.</p> <p>EMOTIONAL TRIGGER: Anger at being accused of doing something I did not/would not do.</p>

AREA FOR IMPROVEMENT: *By controlling this emotion [anger] I am able to redirect the conversation to a more appropriate forum where I can calmly present facts in support of my position without things escalating.*

EVALUATION CRITERIA: *I have and am able to demonstrate empathy for others [Social awareness]*

EXAMPLE:

SCENARIO: *A team member came to me with concerns regarding their ability to achieve the current tasks timeline as their child was sick and needed to attend a few medical appointments that would impact their work hours. I was so frustrated by their lack of drive to meet this deadline that I pushed back saying that if they did not make up their time/deliver, I would have no alternative but to put them on performance management.*

They became so stressed about their child's illness and this additional work pressure that they ended up taking even more leave as they became unwell [migraine] with the deadline not met at all.

YOUR EMOTIONS: *Worry/concern/empathy*

EMOTIONS OF OTHERS: *Scared/embarrassed/stressed*

SELF ASSESSMENT: *By not considering the pressure the employee was under from their sick child and work pressures, my response added even more pressure. This increased pressure on the employee resulted in them also becoming sick and needing additional leave creating and an even later delivery.*

The relationship with this team member also suffered as they do not feel they can come to me because when they did, I did not listen. I suspect they have gone on to share this experience with others and they are also pulling back.

EMOTIONAL TRIGGER: *Frustration at the lack of commitment/dedication of team members/ Other team members not pulling their weight.*

AREA FOR IMPROVEMENT: *By taking the time to consider how the team member is feeling [worried, stressed, stretched between two commitments], I am able to understand how this would make me feel and what I would find helpful. I am then able to approach the discussion [negotiating options] in a more reasonable and mutually beneficial way.*

EVALUATION CRITERIA: *I communicate clearly using a range of methods appropriate to my audience [Relationship management]*

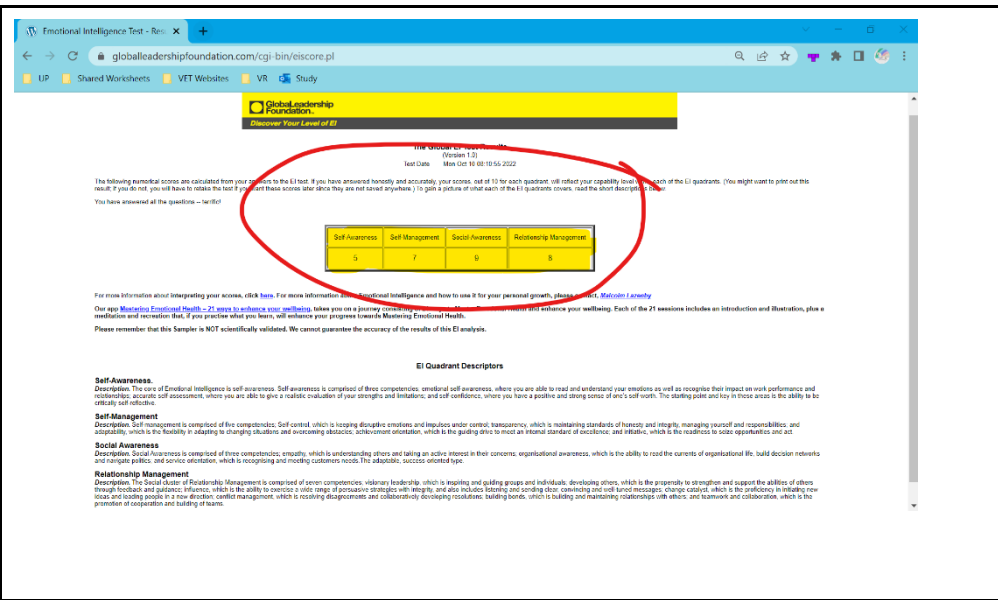
EXAMPLE:

SCENARIO: *While communicating project deliverables recently, I received questions from multiple stakeholders asking me to clarify the details relating to the scope and timeline. I responded to each person individually which meant repeating myself as they could not see each others queries or my replies.*

As more queries came in I was able to re-consider my original plan and even some of the versions I had clarified in the earlier questioning which created inconsistencies in my messaging.

This increased confusion and meant that from kick off the project team were not working towards the same goal.

	<p>YOUR EMOTIONS: Frustration/stress</p> <p>EMOTIONS OF OTHERS: Confusion/frustration</p> <p>SELF ASSESSMENT: My initial communication received follow up queries so I addressed them, however my replies were inconsistent and hap-hazard in nature. As more came in I honed my replies, but forgot to advise those I had answered earlier creating multiple versions of the project deliverables.</p> <p>The added disruption of addressing each set of queries separately was quite frustrating to myself and to the team members who struggled to identify the latest version of information.</p> <p>EMOTIONAL TRIGGER: Frustrated that others do not understand what I feel is clear and logical. Frustrated at the disruptive nature of the questions.</p> <p>AREA FOR IMPROVEMENT: By taking a moment to consider why stakeholders may have questions and the types of questions they have, I can better identify a way to manage their queries and update and communicate a more comprehensive/organised outcome.</p>	
<p>External Evaluation Tool</p> <p>Complete a formal external emotional intelligence evaluation using the following link: Global Leadership Foundation Emotional Intelligence Test.</p> <p>Compare the results against one of the EI element self-assessments captured above confirming if the outcomes support each other or if they differ, offering a reason why this is the case.</p> <p>[NOTE: The self-assessment and external evaluation tool may not identify the same strengths and weaknesses, they are both just tools to facilitate self-reflection.]</p>		
<p>Outcome [Screen shot results]</p>	<p>Assessor instructions: Students must complete the Global Leadership Foundation Emotional Intelligence Test and paste a screen shot of the results as illustrated below.</p> <p>The outcome of the test is not significant however must show that the student has completed the test and result in a score for the following categories between 1-10:</p> <ul style="list-style-type: none"> • Self-awareness • Self-management • Social awareness • Relationship management <p>A sample answer [screen shot] is captured below with the key information required highlighted and captured in the red circle.</p>	

	
<p>Analysis of results for one [1] EI element.</p> <p>Compare the two results [analysis of your strengths and weaknesses above and the external tool outcome] and consider if they confirm or are different and provide one [1] potential reason for this.</p> <p>(Word range: 50-110 words)</p>	<p>Assessor instructions: Using the results above, students must complete an analysis comparing their self assessment to the evaluation tool outcome for one of the EI elements represented in their self-assessment.</p> <p>Students' answers will vary, but must compare the two results for the one EI element selected. The student must confirm if the outcomes support each other or are different and potential reasons why.</p> <p>A sample answer for each [confirmed or different results] are included below.</p> <p>E.g. CONFIRMED RESULTS</p> <p><i>EI element: Self awareness</i></p> <p><i>Results and comparison: My assessment of my self-awareness identified an issue with not taking the time to consider my response and the reasoning/emotions behind this.</i></p> <p><i>This area is also highlighted as an area for improvement in the external evaluation tool which I feel reflects this deficit.</i></p> <p>E.g. DIFFERENT RESULTS</p> <p><i>EI element: Self awareness</i></p> <p><i>Results and comparison: My assessment of my self-awareness showed that I stopped to consider my response to the request and the reasoning/emotions behind this.</i></p> <p><i>This area is highlighted as an area for improvement in the external evaluation tool which is different to my assessment. I was able to take a step back and consider my emotions and their impact in the example provided, however there are circumstances where I do not deliberately take this step meaning that I do not identify my emotion or its impact before reacting. I may need to work on the consistency of this going forward.</i></p>

Task 3: Consultation on areas for improvement

Now that you have completed your self-assessment (step 1 and 2 in Glenda’s email above), it is time to meet with her to identify and discuss areas for improvement of your own emotional intelligence.

For this session you are to host a maximum 5 minute meeting with one [1] participant in the role of Glenda Williams, HR Manager.

During this session you are required to:

- a. Discuss your self-assessment and external evaluation outcomes captured in your self-assessment form.
- b. Examine the examples of interactions with co-workers as covered in your self-assessment form.
 - Identify personal emotional triggers in each of the examples and ask for feedback on this.
 - Discuss appropriate methods for responding to emotional stressors.
 - These examples must demonstrate emotional intelligence in relation to two different work tasks.
- c. Work together to identify at least two [2] improvement areas for your own emotional intelligence.
 - These must include at least one [1] additional area for improvement not captured in your self-assessment form.
 - Include a plan for how to improve your emotional intelligence in each of the two [2] areas raised, incorporating feedback from Glenda.

The participant [Glenda] must provide feedback on the emotional intelligence demonstrated in the examples discussed. This may include reference to:

- the students emotional state in the session and their examples
- the students reactions in the session and their examples
- an awareness of the students needs in their examples
- an awareness of the need of others in their examples

The participant [Glenda] must also:

- show some form of contrary emotion during decision making for the student to respond to (when discussing a solution in relation to their key area of improvement, they need to have an opposing point of view that needs to be considered by the student in decision making), and
- provide an opportunity for the student to promote and demonstrate flexibility and adaptability in their interaction.

During your meeting, you will be assessed on the following:

- Use of appropriate language and nonverbal cues to present information and seek feedback.
- Uses listening and questioning skills to elicit the views of others and to clarify or confirm understanding.
- Identify and show consideration for the emotions of Glenda.
- Apply techniques that promote flexibility and adaptability in your interaction with Glenda.

Role play instructions

The role play/meeting must include at least one [1] participant playing the role of Glenda, must not exceed 5 minutes, and must address all elements of the Observation Checklist below.

The role play/meeting may be resourced using one [1] of the following options:

- A peer who you are already working with, in the industry your qualification relates to.

- A fellow student who will play the role of the HR Manager. Please contact fellow students via the Discussion Forum and coordinate your role play with them directly.

If you are unable to find participants to play the role of the HR Manager, contact your assessor via the Discussion Forum, who will discuss options for pairing up with other students to complete this task.

Participant role outline

Glenda Williams (HR Manager)

[NOTE: Regardless of gender, you may address the HR Manager as Glen or Glenda Williams as preferred by them.]

- Manager level positions
- Must demonstrate active listening and questioning
- Must reference the following through the meeting:
 - the students emotional state in the session and their examples
 - the students reactions in the session and their examples
 - an awareness of the students needs in their examples
 - an awareness of the need of others in their examples
- Must also:
 - show some form of emotion for the student to respond to [excitement about the students assessment or worry about how the student is behaving in the examples], and
 - provide an opportunity for the student to promote and demonstrate flexibility and adaptability in their interaction – this may be through an adjustment to the meeting agenda or to incorporating a new/additional example for consideration in line with feedback being provided.

Option 1: Peer participant

Should you complete this task with a Peer, you must fully brief them, providing them with the context to the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Participants will need to state their name and job title at the start of the recording to inform consent.

Option 2: Fellow student participants

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Students will need to state their name and that they are a student [as their job title] at the start of the recording to inform consent.

Recording instructions

Your role play must be recorded with all participant/s captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the training session. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Submission instructions:

- Save the recording and name the file using the following naming convention:
yymmdd_yourname_BSBPEF502_02_PBT3
- Submit the recording together with your assessment.

**Observation Checklist:
Emotional Intelligence Consultation**

The student being assessed must:	Satisfactory/ Not Yet Satisfactory	Assessor Comments
Discuss their self-assessment and external evaluation outcomes with the HR Manager.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Examine the examples of interactions with co-workers to identify personal emotional triggers.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Discuss appropriate methods for responding to emotional stressors.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Ask for feedback on their experiences, assessment and areas for improvement and incorporate this in the solutions process.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Work together to identify and plan to address two (2) area for improvement.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Demonstrate an awareness of their own emotional state and react appropriately.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Demonstrate an awareness of their own needs and the needs of others and react appropriately.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Respond appropriately to the HR Managers emotional state.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Promote flexibility and adaptability during their interaction.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Use appropriate language and nonverbal cues to present information and seek feedback.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Use listening and questioning skills to elicit the views of others and to clarify or confirm understanding.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Use appropriate systems [i.e. MS teams or Zoom] to run the session.	S <input type="checkbox"/> NYS <input type="checkbox"/>	

Assessor instructions: Students must record a meeting to consult on areas for improvement in their emotional intelligence with the HR Manager (Glen or Glenda Williams). During this session students are required to:

- a. Discuss their self-assessment and external evaluation outcomes captured in your self-assessment form.
- b. Examine the examples of interactions with co-workers as covered in their self-assessment form.
- c. Work together to identify at least two [2] improvement areas for their own emotional intelligence.
 - o These must include at least one [1] additional area for improvement not captured in your self-assessment form.


Students must specifically address the following elements:

- Discuss their emotional intelligence in at least two [2] examples/scenarios – examples are included in the self-assessment form completed in Part B Task 1, 2a and 2b. Include identification of their emotional triggers and appropriate methods for responding to emotional stressors.
- Identify areas for improvement in their emotional intelligence with a stakeholder – for example, the need to stop and take stock of the motivations/needs of others in a work environment before reacting emotionally themselves.
- Identify personal emotional triggers incorporating feedback from others – for example acknowledging that in understanding the needs of others they may not be as upset by being asked to help out.
- Respond to an emotional expression from the HR Manager – for example if the HR Manager is becoming worried by the behaviours demonstrated by the student, the student may remind them that this exercise is to increase awareness and improve their responses in the future.
- Apply flexibility and adaptability during the interaction based on the emotions of others – for example adjust the meeting plan to fit in with their schedule [time limitations] or promote alternative examples to help address the feedback provided outcome.

The meeting must not exceed 5 minutes [excluding the collection of participant consent at the start of the recording].

Use the observation checklist above to record the outcomes of this task.

Part C: Development of emotional intelligence in others

	To:	HR Officer (HR.Officer@cbsa.com.au)
	From:	Glenda Williams (glenda.williams@cbsa.com.au)
	Date/time:	Monday 2:19 p.m.
	Subject:	Emotional Intelligence Program launch
	Attachment:	Emotional Intelligence Policy and Procedures.pdf

Good afternoon,

I really found that self-assessment process run through invaluable. Thank you so much for doing such a great job of applying the *Emotional Intelligence Policy and Procedure* to complete your self-assessment form and for being so open and honest in our consultation on areas for improvement.

I feel we are now ready to implement the Emotional Intelligence Program and am looking to make this more than just circulation of a policy document.

To really engage people I would like you to develop a quiz to get people thinking about and working to improve their emotion intelligence. I think the best way to do this would be to develop an emotional intelligence quiz that provides staff an opportunity to understand the effect of personal behaviour and emotions on others.

Then we are ready to implement the Emotional Intelligence Program via email to all staff. This communication will need to include the following:

- An overview of the Emotional Intelligence Program
- A link to the Emotional Intelligence Policy and Procedure document
- Implementation timeline:
 - o Within 2 weeks: Completion of the “Develop Emotional Intelligence Quiz” found at Appendix B
 - o Between 2-4 weeks: Team Managers to schedule at least one opportunity for team members to express their thoughts and feelings in line with *Procedure section 3.2*
 - o Between 4-8 weeks: Completion of the “Self-Assessment Form” found at Appendix A,

If you could finalise the quiz and circulate the launch email by Friday, that would be perfect.

Thanks again for all your help.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

<http://www.cbsa.com.au>



ATTACHMENTS

- **Emotional Intelligence Policy and Procedures**

Refer to document link in Part A: Emotional Intelligence Policy and Procedures

Task 1: Develop Emotional Intelligence Quiz

Access the *Emotional Intelligence Policy and Procedure* document [continued from Part A of this assessment].

Appendix B: Develop Emotional Intelligence Quiz provides the template for a single scenario quiz to be created to support the Emotional Intelligence Program launch.

In the spaces provided within the template in the appendix, complete the following sections:

- **Scenario:** Outline a short workplace scenario that incorporates the following components:
 - o A colleague and at least one (1) other participant
 - o Some form of emotional conflict – so that a key emotion and related negative personal behaviours can be identified in the answers.
 - o An element of rigidity on behalf of one party (not being flexible or adaptable) – so that a more flexible and adaptable approach can be identified in the answers.
 - o An element of one sided decision making (not considering the emotions of others) – so that a more considerate decision making process can be identified in the answers.

[Approximate word range: 100-150 words]

- **Answers:** Provide quiz answers for each of the four (4) questions captured below the scenario. These answers must include the following:

- One [1] correct answer for each question. Capture this in line with the green option as indicated in the Answers box
- Two [2] incorrect answers for each question – these must show a lack of emotional intelligence and contradict the correct answer. Capture this in the grey options remaining.

[Approximate word range: 10-40 words per answer option as indicated on template]

ASSESSOR INSTRUCTIONS: THE ANSWER FOR THIS QUESTION IS CAPTURED WITHIN THE EMOTIONAL INTELLIGENCE POLICY AND PROCEDURE DOCUMENT.

Students must provide one [1] short scenario that demonstrates a poor interaction in terms of emotional intelligence. The scenario must involve two [2] or more people, include a form of emotional conflict (so that the emotion and related negative behaviours can be identified), demonstrate rigidity (so that flexible and adaptable options can be identified) and inconsiderate decision making (so that decision making that allows for consideration of the emotions of others can be identified).

Students must then provide three [3] quiz answers for each of the questions captured in the template. This includes one [1] correct answer (in the green field as identified) and two [2] incorrect answers. The correct answers must demonstrate an awareness of emotional intelligence and how to apply flexibility and considerate decision making.

In total students must capture one [1] scenario and for each of the four [4] questions one [1] correct answer and two [2] incorrect answers in the spaces provided.

Sample answers are provided below. Alternative answers are acceptable, but must meet the criteria set out in the Assessor Instructions above.

DEVELOP EMOTIONAL INTELLIGENCE QUIZ					
Name:	[Filled in by staff member completing the quiz]				
Scenario: Outline a short workplace interaction [Word range: 100-150 words]	<p><i>Jane is the Project Manager on a project. George is a Business Analyst working on the analysis and delivery of the project.</i></p> <p><i>Jane called a meeting to discuss the project timeline and advised George that the deadline was to be in four weeks. George felt that this was not enough time and requested this be extended to six weeks to allow for the volume of work he needed to complete.</i></p> <p><i>Jane had already communicated with the client and was not in a position to change the timeline so she cut George off when he tried to raise his concerns and told him that he would just have to work harder to make sure the deadline was met.</i></p> <p><i>George knowing this was not achievable stated that he had better get started then and stormed out of the room.</i></p>				
Question 1:	Identify the key emotion[s] observable in the scenario?				
Answers: Capture the correct answer in "a" [Word range: 10-40 words per option]	<table border="1"> <tbody> <tr> <td>a.</td> <td> <p><i>Jane was worried/stressed about meeting the deadline she has already committed too.</i></p> <p><i>George was frustrated/upset that Jane does not care he cannot meet the deadline/is not listening to his concerns around the deadline.</i></p> </td> </tr> <tr> <td>b.</td> <td> <p><i>Jane was angry at George for not working hard enough.</i></p> <p><i>George feels ambivalent and is just being lazy.</i></p> </td> </tr> </tbody> </table>	a.	<p><i>Jane was worried/stressed about meeting the deadline she has already committed too.</i></p> <p><i>George was frustrated/upset that Jane does not care he cannot meet the deadline/is not listening to his concerns around the deadline.</i></p>	b.	<p><i>Jane was angry at George for not working hard enough.</i></p> <p><i>George feels ambivalent and is just being lazy.</i></p>
a.	<p><i>Jane was worried/stressed about meeting the deadline she has already committed too.</i></p> <p><i>George was frustrated/upset that Jane does not care he cannot meet the deadline/is not listening to his concerns around the deadline.</i></p>				
b.	<p><i>Jane was angry at George for not working hard enough.</i></p> <p><i>George feels ambivalent and is just being lazy.</i></p>				

	c.	<i>Jane was relaxed and not concerned that the client would find out she isn't able to meet her deadline. George was happy to show Jane what he can do to help her meet her deadline.</i>
Question 2:	What personal behaviours are being demonstrated that reflect this emotion?	
Answers: Capture the correct answer in "c" [Word range: 10-20 words per option]	a.	<i>Jane was happy and laughing during the meeting and George was relaxed, reclining in his chair as he listened to the details.</i>
	b.	<i>Jane was screaming at George and George was swearing at Jane and threatening to quit.</i>
	c.	<i>Jane cut George off when he was talking about what he needed and George stormed out of the room.</i>
Question 3:	How could flexibility and adaptability have helped in this scenario?	
Answers: Capture the correct answer in "a" [Word range: 10-20 words per option]	a.	<i>Jane and George could have discussed additional resources (people or tools) that could help to complete the work within the timeline.</i>
	b.	<i>Jane could have taken George off the project and put a different Business Analyst that was less likely to complain.</i>
	c.	<i>Jane could have quit and let George take over the running of the project.</i>
Question 4:	How could decision making better consider the emotions of others?	
Answers: Capture the correct answer in "b" [Word range: 15-40 words per option]	a.	<i>Jane could have indicated that the deadline was not determined by her, but passed down from higher up.</i>
	b.	<i>Jane could have waited until George had finished expressing his concerns so he felt heard and then explained why she was unable to extend the deadline so he could understand her emotions/considerations.</i>
	c.	<i>Jane could have indicated she would see what she could do to diffuse the conversation in the meeting and then confirm the original timeline with George later stating it was not possible to change it.</i>

Task 2: Launch Emotional Intelligence Program

Develop and circulate an email to all CBSA staff to launch the Emotional Intelligence Program.



In order to implement this program, the email must include the following information:

- An overview of the Emotional Intelligence Program
- A link to the Emotional Intelligence Policy and Procedure document
- Implementation timeline and actions required:
 - Within 2 weeks: Review the Emotional Intelligence Policy and Procedure document

- Within 2 weeks: Complete the “Develop Emotional Intelligence Quiz” found at Appendix B and submit a copy to HR
- Between 2-4 weeks: Team Managers to schedule at least one opportunity for team members to express their thoughts and feelings in line with Procedure section 3.2
- Between 4-8 weeks: Complete your own “Self-Assessment Form” found at Appendix A – Team Manager to advise HR when complete

Submit this using the template below and attach the updated documents (reference it in the attachments and the content of the message).

[Approximate word count: 250 words in email content]

 <h2 style="margin: 0;">Email Template</h2>	
To:	<<Add name(s) and position title of main email recipients here>>
From:	<<Add your name and position title here>>
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>
<p>To <<Add email recipient(s) name here>>, <<Add message here. Add as much space as necessary.>></p> <p>Kind regards <<Add your name here>></p>	
 <p><<Add your job position here>> 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222 http://www.cbsa.com.au</p>	


Assessor instructions: Students must prepare an email to all CBSA staff using the Email Template.

The email must specify:

- the email be delivered to ALL STAFF
- the email is from themselves in the role of HR Officer
- the date and time that they sent the email
- a relevant subject (such as Emotional Intelligence Program)
- the reason for the email including the following information:

- An overview of the Emotional Intelligence Program
- A link to the Emotional Intelligence Policy and Procedure document
- Implementation timeline and actions required:
 - Within 2 weeks: Review the Emotional Intelligence Policy and Procedure document
 - Within 2 weeks: Complete the “Develop Emotional Intelligence Quiz” found at Appendix B and submit a copy to HR
 - Between 2-4 weeks: Team Managers to schedule at least one opportunity for team members to express their thoughts and feelings in line with Procedure section 3.2
 - Between 4-8 weeks: Complete your own “Self-Assessment Form” found at Appendix A – Team Manager to advise HR when complete
- the attachments must be included [Emotional Intelligence Policy and Procedure]
- student must specify their job position that they are role playing [Human Resources Officer].

A sample answer is provided below. however alternative answers are acceptable as long as they address the assessor instructions above.

 COMPLETE BUSINESS SOLUTIONS AUSTRALIA	Email Template
To:	<i>All CBSA Staff</i>
From:	<i><<Students name and position title here>></i>
CC:	
Date/time:	<i><<Add any time and date of the email here>></i>
Subject:	<i>Emotional Intelligence Program Launch</i>
Attachments:	<i>Emotional Intelligence Policy and Procedure.pdf</i>
<p><i>--ALL STAFF--</i></p> <p><i>I am excited to announce the launch of the CBSA Emotional Intelligence Program.</i></p> <p><i>WHAT IS IT?</i></p> <p><i>Emotional Intelligence (EI) refers to our ability to understand and manage our emotions in a positive way. EI can relieve stress, help us to communicate better, build better relationships, overcome challenges and neutralise conflict.</i></p> <p><i>WHERE CAN I FIND OUT MORE?</i></p> <p><i>Please review the <u>Emotional Intelligence Policy and Procedure</u> document attached to this email to understand more about EI and how we can apply it to our work.</i></p> <p><i>WHAT DO I NEED TO DO?</i></p> <p><i>Implementation of this program is scheduled to occur over the next two months based on the following activities:</i></p>	

TIMEFRAME	ACTIVITY	CHECK
<i>Within 2 weeks</i>	<i>Review the Emotional Intelligence Policy and Procedure document attached above.</i>	<input type="checkbox"/>
<i>Within 2 weeks</i>	<i>Complete the “Develop Emotional Intelligence Quiz” found at Appendix B in the Emotional Intelligence Policy and Procedure document and submit completed quiz to HR for completion tracking.</i>	<input type="checkbox"/>
<i>Between 2-4 weeks</i>	<i>All TEAM MANAGERS to schedule at least one opportunity for team members to express their thoughts and feelings in line with Procedure section 3.2.</i>	<input type="checkbox"/>
<i>Between 4-8 weeks</i>	<i>Complete your own “Self-Assessment Form” found at Appendix A. [TEAM MANAGERS to advise HR when completed.]</i>	<input type="checkbox"/>

Once you have completed your very own self-assessment, it is recommended that you make time with your manager to capture their feedback and discuss the outcomes/areas for improvement. Once this process is completed, your manager will send HR an email to advise that you have completed your first Self-Assessment Form for tracking purposes only – your actual form will not be captured or kept by HR.

Keep your eye out for more activities and opportunities in this space following on from there.

If you have any questions or comments regarding this program, please contact Human Resources.

Kind regards

<<Students Name>>



HR Officer
 300 Fictional Way, Sydney, NSW 2000
 Phone: 1800 111 222
<http://www.cbsa.com.au>

Assessment checklist:

Students must have completed all tasks within this assessment before submitting. This includes:

Part A – Emotional Intelligence Policy and Procedure development		
Task 1	Emotional stressors in the workplace <i>Policy section 1.2 of the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 2	Responding to emotional stressors <i>Procedure section 2.2.1 of the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 3a	Emotional expression [range] <i>Procedure section 2.2.3 of the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 3b	Applying emotional expression to case study <i>Completed in assessment document – answer space provided</i>	<input type="checkbox"/>
Task 3c	Applying emotional expression to case study <i>Completed in assessment document – answer space provided</i>	<input type="checkbox"/>

Task 4	Understanding the effects of personal behaviour and emotions on others <i>Procedure section 3.1 of the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 5	Opportunities to express thoughts and feelings <i>Procedure section 3.2 of the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 6	Feedback on emotional stressors in the workplace <i>Completed in assessment document – email template</i>	<input type="checkbox"/>
Part B – Emotional Intelligence self-assessment		
Task 1	Develop evaluation criteria <i>Appendix A: Self-Assessment Form template in the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 2a	Complete self-assessment <i>Appendix A: Self-Assessment Form template in the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 2b	Complete external evaluation tool <i>Appendix A: Self-Assessment Form template in the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 3	Consultation on areas for improvement <i>Recorded meeting</i>	<input type="checkbox"/>
Part C – Development of emotional intelligence in others		
Task 1	Develop emotion intelligence quiz <i>Appendix B: Self-Assessment Form template in the Emotional Intelligence Policy and Procedure document</i>	<input type="checkbox"/>
Task 2	Launch Emotional Intelligence Program <i>Completed in assessment document – email template</i>	<input type="checkbox"/>



Congratulations you have reached the end of Assessment 2!

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