BSBPMG534

ASSESSOR GUIDE

# MANAGE PROJECT HUMAN RESOURCES

## Assessment 5 of 7

Project

Version 1

# Assessment Instructions (general)

## Task overview

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

- Part A – Identify project human resources and project activities (project)
- Part B – Meeting with the project team
- Part C – Team training

Read the case study and complete each part.

## Additional resources and supporting documents

To complete this assessment, you will need:

- CBSA policy and procedures (available via the CBSA website)
- CBSA Project HR Plan – Project B (attachment)
- New office project charter (supporting document attachment)

## 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:

a. the processes for conducting the assessment (e.g. allowing additional time)
b. 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.

## Task instructions (for the student) Part A: Identify project human resources and project activities

In this task, you will draft a plan that outlines the human resources required for the Adelaide Branch Office project.

Case study: Read the following e-mail and complete the following steps.

| | |
|---|---|
| To: | Zane O'Brien (zane.obrien@cbsa.com.au)) |
| From: | Gavin Stead (gavin.stead@cbsa.com.au) |
| Date/time: | Tuesday 8.05 a.m. |
| Subject: | Adelaide Branch Office Project |
| Attachment: | Project Human Resource Plan Template.docx, New Office Project Charter.docx ***(supplied as supporting documents)*** |

Good morning Zane,

As you would be aware, we have been expanding quite quickly and are finding there are many new clients in South Australia. The Board has agreed to set up an office in the state, and you have been brought into our business initially to project manage the development and implementation of new office premises in Adelaide. Some work has already been started, including some sections of the Project Charter, which is still in draft and has some gaps but will give you some further information.

The Board is keen to keep within budget and be able to get us up and running in the Adelaide office within a year. They are also keen to ensure the office is environmentally sustainable to be in line with organisational goals.

You will need to source staff from our personnel here at the Head Office, and you will need to ensure the department managers can release the staff to work on the project. I would assume this would have to be under flexible arrangements and possibly short-term secondment – a month for short jobs as we are on strict timelines for a number of projects to complete in the same year – Glenda may be able to help you with this further. However, the Board indicated they were willing to employ a team member who will be working (initially) from their home in Adelaide. This has already been put in motion, and Glenda (HR Manager) assures me by the end of this week, the Adelaide candidate, Paris Morales, will be on Board.

I would like you initially to concentrate on the human resources side of the project and to put together a project team inclusive of Paris and determine the project team member roles. You will need to draw up a draft Project Human Resources Plan (I have attached the template for you) and then meet with your team to agree on the roles to be completed. Just to remind you of the e-mail from HR recently noting the template has been changed and additional information is now required to be included.

I would expect this should be completed within the next couple of weeks.

I know we will be keeping in touch over the project, and I look forward to working with you.

Kind regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

## Steps

1. Use the **CBSA Project HR Plan – Project B** to draft a project human resources plan. The template provides guidance on the information that needs to be communicated.

   Your Assessor will check that you have:

   - Used clear language
   - Industry-related terminology
   - Followed the appropriate report structure
   - Used appropriate punctuation, grammar and correct spelling.

2. Prepare an e-mail to the Project Sponsor and department heads of the team members to:

- Provide a background of the project
- Who is the project manager and team leader
- The staff member who is already part of the team
- Request for release of the staff member
- Why the staff member is needed for the project
- Time staff member is required to commit to the project
- The commitment required of the staff members
- Length of the project, including the months they will be needed and any potential team training exercise

| | |
|---|---|
| To: | |
| From: | |
| Date/time: | |
| Subject | |

Salutation

E-mail body

Student name

### Submission instructions

Submit your assessment via the LMS.

## Assessor instructions Part A: Identify project human resources and project activities

### Purpose of task

This part is designed for the student to demonstrate they can as a project manager, plan project human resources, allocate roles to, and communicate and gain agreement for relevant persons.

### Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

The student must do the following:

- Complete all sections of the **Project Human Resource Plan** appropriately, and the information must be directly related to the scenario and CBSA policy and procedure and organisational chart. There will be some variations in relation to the human resources selected and their role.
- Use the Project Human Resource Plan template. See **BSBPMG534 SD ASSESSOR CBSA Project HR Plan – Project B V1.0** for guidance on assessing the task. The content will vary, and the guidance is an example only. You will need to accept variations of this.

  **NOTE: Although there will be some items that are similar to Project A, this project is longer and more complex and, therefore, will have different human resource needs. It is important the student does not just copy the information from Project A directly into Project B's plan. There should also be differentiation in the training offered and the rewards and acknowledgement sections from Project A.**

  There are also additional sections in Project B's plan to be completed.
- *Write an e-mail to the Project Sponsor and department heads of the team members. The student must:*
- *use the CBSA e-mail template*
  - using appropriate language for requesting the release of staff, e.g. business-like, respectful, asking, not demanding
  - using paragraphing, sentencing, punctuation and bullets (as required) to improve the readability of the e-mail
  - spelling project terminology and person's names correctly
  - outlining the purpose of the e-mail, including at a minimum:
    - background to the project
    - who is the project manager and team leader (Zane O'Brien)
    - the staff member already part of the team (Paris Morales)
    - request for release of the staff member
    - why the staff member is needed for the project
    - time staff member is required to commit to the project
    - the commitment required of the staff members.
  - the length of the project

  - the months they may be needed and any potential team training exercise
- request for a response by a set time.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

## Marking criteria Part A: Identify project human resources and project activities

### Assessment submission checklist

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

| Part A: Identify project human resources and project activities | | |
|---|---|---|
| 1. | CBSA Project HR Plan – Project B | ☐ |
| 2. | E-mail | ☐ |

### Assessment marking criteria

Assessor instructions: All sections must be completed.

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is not yet satisfactory (NYS) and requires resubmission.

| | MARKING CRITERIA | Satisfactory (S) | Not Yet Satisfactory (NYS) |
|---|---|---|---|
| 1. | The student submitted a draft human resource plan using the CBSA template and: | ☐ S | ☐ NYS |
| | • Outlined the outcomes and deliverables of the project | ☐ S | ☐ NYS |
| | • Explained the purpose of the HR plan | ☐ S | ☐ NYS |
| | • Described the methods used to determine human resource requirement | ☐ S | ☐ NYS |
| | • Outlined and developed a work breakdown structure | ☐ S | ☐ NYS |
| | • Described and recorded how they estimated the required number of staff for the project | ☐ S | ☐ NYS |
| | • Illustrated the human resource needs for the project | ☐ S | ☐ NYS |
| | • Completed a RACI matrix | ☐ S | ☐ NYS |
| | • Outlined the tools and techniques used to analyse project team skills, knowledge and competency needs | ☐ S | ☐ NYS |
| | • Incorporated key performance indicators for the project team and for the individual project team members | ☐ S | ☐ NYS |
| | • Identified the project team and their roles and responsibilities | ☐ S | ☐ NYS |
| | • Described the impact of legislation and organisational policy on the project | ☐ S | ☐ NYS |
| | • Explained the method of project team member acquisition | ☐ S | ☐ NYS |
| | • Outlined project staffing assumptions and constraints | ☐ S | ☐ NYS |
| | • Summarised how the team and individual work performance would be monitored, reviewed and improved | ☐ S | ☐ NYS |
| | • Outlined the team member engagement strategy | ☐ S | ☐ NYS |
| | • Outlined the purpose for and determined the training and development opportunity for the project team members | ☐ S | ☐ NYS |
| | • Refer to the process to resolve project team conflict resolution if it occurs and refer to the appropriate CBSA policy and procedure | ☐ S | ☐ NYS |

| | | | |
|---|---|---|---|
| | • Explained the importance of a recognition and rewards system for project team members | ☐ S | ☐ NYS |
| | • Identified two recognition and reward methods for the project | ☐ S | ☐ NYS |
| | The student's written communication in the report included:<br>• clear language<br>• Industry-related terminology<br>• appropriate report structure<br>• appropriate punctuation, grammar and correct spelling. | ☐ S | ☐ NYS |
| 2. | The student submitted an e-mail to the Project Sponsor and department heads of the team members and:<br>• Provided background of the project<br>• Who is the project manager and team leader<br>• The staff member who is already part of the team<br>• Requested for release of the staff member<br>• Why the staff member is needed for the project<br>• Time staff member is required to commit to the project<br>• The commitment required of the staff members<br>• Length of the project, including the months they will be needed and any potential team training exercise | ☐ S | ☐ NYS |

## Task instructions (for the student) Part B: Meeting with the Project Team

In this task, you are required to prepare for and meet with your project team to discuss the HR plan via a role-play and advise relevant persons of the outcome of the meeting. You will need access to two people to participate in the role play, and these can be peers or other students. One of the people will be your assessor, who will act in the role of Paris Morales, Business Development Specialist – Adelaide.

**Role play instructions**

The role-play/meeting must include at least two participant/s, must not exceed 15 minutes duration and must address all elements of the Observation Checklist below. One of the participants will include the assessor. Organise a suitable time with your assessor.

In this task, you will participate in a role/play meeting with others. These may be resourced using one of the following options:

1. Peer/s who you are already working with, in the industry your qualification relates to.
2. Fellow student/s who will play the role of a team member. Please contact your fellow student/s via the Discussion Forum and coordinate your role play with them directly.

If you are unable to find a participant/s to play the role of the other team member/s, contact your assessor via the Discussion Forum, who will discuss options for pairing up with another student/s to complete this task.

**Option 1: Peer/s participant**

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

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

**Option 2: Fellow student/s participant**

Fellow student/s 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.

Student/s 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 participant/s at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with 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.

Include this recording as part of your assessment submission.

Scenario: The departmental managers have responded to your e-mail. They have agreed to release their staff so long as you identify exactly when they are needed and remind them a week out from the time they are required.

You are now required to meet with your project team. Your assessor will arrange a time and place suitable for the meeting.

You will attend the meeting in the role of Zane O'Brien, Human Resources Consultant. Your assessor will role-play one of the Adelaide team members, Paris Morales, with two other people/students/assessors role-playing the other team members you have selected.

**Prior to the meeting:**

- Make sure the project HR plan is completed.
- Think about what objections the team members may bring to the table.
- Consider what will be non-negotiable team roles and responsibilities.
- Work out a team goal to present to the team.

**At the meeting,** you will need to be able to:

- Introduce yourself and your role.
- Outline the project, the project goal, timeline and deliverables.
- Briefly outline the draft HR plan – you may wish to provide the team with a copy.
- Outline the project team roles and responsibilities.
- Negotiate the team roles where there is a difference of opinion.
- Ask the team members for feedback and input
- Outline the team goal and then discuss, identify and obtain agreement from the team for two KPIs for the team (not individual team members). These KPIs will be added to the HR plan after the meeting.

During the meeting, your assessor will also be looking to see if you:

- clearly explained the project HR plan and team roles
- used non-verbal language to convey meaning to verbal exchanges
- asked open and/or closed questions to confirm the information given to team members is understood
- asked an open question to find out the opinion of the team members on the allocation of the roles
- paraphrased to confirm understanding when appropriate
- used active listening skills, i.e. in response to any questions asked or opinions given
- asked a question of the team members to confirm the changes to be made
- used questioning to obtain agreement on actions to be taken

**After the meeting:**

- Make the changes and amendments and add any additions to the draft HR plan and submit as the final copy. Clearly show where you made the changes and/or additions to the plan; for example, include a different colour text or font.
- Use the CBSA e-mail template to write an e-mail to the project sponsor summarising the meeting and attaching the plan. Include:
  - one learning and development need for the team you have identified at the meeting
  - why do you see the learning and development need as important? You can add that you will look to organise training for this in the near future.
  - a comment about the rewards and recognition section in the HR plan.

In your e-mail, your assessor will be looking to see you:

- used the CBSA e-mail format
- used language and structure appropriate to an e-mail to the Project Sponsor, Gavin Stead
- included the purpose of the e-mail
- only include information relevant to the reason for the e-mail.

| | |
|---|---|
| To: | |
| From: | |
| Date/time: | |
| Subject | |

Salutation

E-mail body

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

### Submission instructions

Submit a recording of your role play/observation via the LMS.

## Assessor instructions Part B: Meeting with the Project Team

There is no submission due date for this task. Students may submit this task when they are ready.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

## Purpose of task

This part is designed for the student to demonstrate they can participate in a range of verbal exchanges appropriate to the audience and seek agreement on parts of the HR plan.

## Guidance to assessor about the task

The Assessor is to arrange/confirm a suitable time and place with the student to conduct the role-play. The assessor is to negotiate with the student the number of people to attend the meeting based on the project team organisation chart the student has submitted in their HR plan. Script has only been given for three team members plus the student (project manager). It is acceptable for the project manager to say at the meeting that a team member is not available and how they will get their approval and feedback on the HR plan.

The meeting should occur in a place simulating a meeting room and be where the time is uninterrupted.

The meeting can occur face to face or via electronic video programs. However, you will need to simulate Paris Morales as joining the meeting from the Adelaide office. This may be a simple teleconference, zoom or a room divider to give the impression of not being in the room with other team members.

### Note to assessor:

As Assessor, it will be important to make sure you know exactly what the student is to get out of the meeting so they can continue to complete the other tasks in this assessment.

Advice has been provided; however, not all aspects may have been covered. As other students may be taking on the roles of team members, it is suggested a draft copy of each students' HR plan is submitted prior to the meetings held. As well, it is suggested that students who have already had their meetings become team members for future student assessment meetings. Alternatively, you might choose another assessor or appropriate person to role-play team members. These strategies are to minimise disadvantaging the students who are first to attend and lead their meetings.

### Information about the role-play – the meeting

The student will role-play the position of Zane O'Brien, Human Resources Consultant

The Assessor will role-play the position one of Paris Morales, Business Development Specialist – Adelaide

Another Assessor or suitable person will role-play the other two team members as selected by the student

### Role-play script

**Team member 1 (Assessor):** role-play a team member who has had wide project team experience as a team member

- Identify one role/responsibility/accountability outlined in the HR plan you are not comfortable with and question why it has been allocated to them and not to someone else.
- Ensure there is some change that will need to be made.
- Select one role in the HR plan the student has listed as non-negotiable and say something like: 'I can't see the reason why it is so – can you please explain it to the team?'
- Be prepared to add KPIs for the team if necessary, ensuring there are performance measurements for communication, e.g. 'The team will respond to any external or internal communication regarding the project within 24 hours'.
- Be prepared to add a KPI for members about sustainable work practices if it is not included in the student's project HR plan. You might say: 'Since there is so much about global warming and part of CBSA goals are for employees to work in a sustainable work manner, what do you think about including a KPI related to sustainable practices when working on the project?' e.g. 'Minimise the amount of printing of e-mails and other documents'; 'shred and recycle paper whenever possible'.

**Team member 2 – to role-play Paris Morales (Student or another assessor/person)**

- Ask a question about the time commitment for the people who are not working full time on the project and what might happen if they cannot make team meetings or training or meet timelines.
- During the meeting, a couple of times, sound exasperated and ask the project manager or another team member to repeat what they said, e.g. 'I'm sorry, but you cut out. Could you repeat that, please?' or 'I only caught the last part of what you were saying – would you mind telling me what you said?' or 'There is a real

crackling on the line – I am only getting every second word. Was that an important point I should know?' or 'Can you speak up? I only heard the first part of the conversation'.

**Team member 3 (Student or another assessor/person)** as applicable for team members selected. It is the first time these team members have been on a project team where they are not full-time but are kept informed and will work as needed.

- Ask a question about how will they know when they are needed and what warning will be given.

**The student must:**

- introduce themselves and their role
- briefly introduce the team members by name and the department they come from
- outline the project, timeline and deliverables
- outline the draft HR management plan
- outline the project team roles and responsibilities
- ask the team members for feedback and input
- negotiate the team roles where there is a difference of opinion
- obtain agreement from the team on the two KPIs for the team (not individual team members).

During the meeting, the student must also:

- confirm decisions made during the meeting and actions to be taken as a result
- be concise and clear when asking a question or giving an answer
- use appropriate non-verbal language, e.g. body language (eye contact, no crossing arms, a nod of the head), tone of voice and speed of delivery
- use interpersonal skills to minimise any misunderstandings such as 'I'm not sure I understand what you are saying' or 'I don't feel we are both feeling the same way about this role'
- use active listening skills (nod head, make eye contact, paraphrase, and use phrases such as 'I see' or 'I like that.') to show understanding, clarify information, acknowledge comments and confirm outcomes
- select and use appropriate conventions and protocols when communicating, such as not interrupting the Project Manager when they are talking, showing respect through tone of voice
- be respectful and patient with all team members, especially the difficulty with Paris simulating a video conference call.

**After the meeting**

The student must complete the following:

- Submit a final HR plan with the changes suggested at the meeting. They will need to clearly highlight where the changes, amendments, and add any additions to the draft HR plan have been made (different colour/font etc.).
  - There may be some fine-tuning of the KPIs for the team.
  - At least two KPIs for the team must be added to the KPI section in the HR plan
  - There is to be an alteration to one of the team roles/responsibilities/accountabilities.
- Write an e-mail to the Project Sponsor and Project Steering Committee whereby the student:
  - included the purpose of the e-mail
  - summarised the meeting
  - attached the final HR plan
  - outlined at least one learning and development need for the team identified at the meeting
  - included the reason for the learning and development need
  - identified they will organise training in the near future
  - used the CBSA e-mail format

– used language and structure appropriate to an e-mail to the Project Sponsor, Gavin Stead
– only included information relevant to the reason for the e-mail

Accept variations of the following:

| | |
|---|---|
| To: | *Gavin Stead [gavin.stead@cbsa.com.au]* |
| From: | *Zane O'Brien [zane.obrien@cbsa.com.au]]* |
| Date/time: | *Thursday 4.20 p.m.* |
| Subject: | *Adelaide Branch Office Project* |
| Attachment: | *Project Human Resource Plan* |

*Dear Gavin,*

*I have completed a project team meeting with the team members. It was interesting as we had all the head office staff together and Paris in Adelaide. We had a few glitches, and the sound was not fantastic. It is certainly going to be interesting in the future as to how well these meetings will go and how patient the team members are with each other.*

*Other than that, the meeting went well, and all team members agreed to their roles and responsibilities and KPIs. We managed to identify and agree on two KPIs for the team that each team member felt were important to the overall team goal and deliverables. These were around team communication and working as a team and environmentally sustainable work practices, as this, I believe, is one of the goals of the organisation.*

*As an outcome of the meeting, I am considering organising a team learning and development activity as each team member, including myself, is new to each other. I feel if we don't get to know each other and learn how to communicate effectively – that it is n a timely manner and will full disclosure of information, issues or problems – we may face some potential conflict, and the project may be in danger of falling behind schedule. I will let you know my ideas further as I work through my training idea.*

*I would also like to alert you to the awards and recognition section of the HR plan. I firmly believe this is an important part of working as a team and would like you to be involved in recognition of any job well done, especially if the project comes in on time and within budget. We can discuss this further, but it may be simply a congratulatory e-mail from you.*

*Please find attached the final HR plan for the Adelaide Branch Office Project. I would be pleased if you could provide me with some feedback if necessary, and if all is OK, sign off on the plan.*

*Regards,*

*Zane O'Brien*

*Website Design 3D pot making venture for CreatePots – Project Office*

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

CBSA
COMPLETE BUSINESS SOLUTIONS AUSTRALIA

There is no submission due date for this task.

Review all evidence and mark using the assessment checklist and marking criteria listed below.

## Marking criteria Part B: Meeting with the Project Team

### Assessment checklist

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

| Part B: Meeting with the project team | | |
|---|---|---|
| 1. | Final copy of HR plan with amendments and any additions | ☐ |
| 1. | E-mail | ☐ |

## Observation checklist

The assessor observed the student's skills and satisfactorily (S) covered the following criteria or not yet satisfactory (NYS) and requires re-assessment.

| MARKING CRITERIA / OBSERVATION CHECKLIST<br>[To be completed by the Assessor when they watch the video or observe the assessment in real-time as they conduct the assessment] | | Satisfactory (S) | Not Yet Satisfactory (NYS) |
|---|---|---|---|
| 1. | Introduced themselves and their role as project manager | ☐ | ☐ |
| 2. | Outlined the project, project goals, timeline and deliverables | ☐ | ☐ |
| 3. | Briefly and clearly outlined the draft HR resource plan | ☐ | ☐ |
| 4. | Outlined the project team roles and responsibilities | ☐ | ☐ |
| 5. | Negotiated the team roles and responsibilities where there was a difference of opinion | ☐ | ☐ |
| 6. | Asked the team members for feedback on the HR plan | ☐ | ☐ |
| 7. | Presented a team goal to the team for approval | ☐ | ☐ |
| 8. | Discussed, identified and obtained an agreement from the team on at least two KPIs for the team | ☐ | ☐ |

## Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is not yet satisfactory (NYS) and requires resubmission.

| MARKING CRITERIA | | Satisfactory (S) | Not Yet Satisfactory (NYS) |
|---|---|---|---|
| 1. | The student submitted the **final HR plan** and included additions to the draft HR plan as a result of the actions from the meeting with the project team, including:<br>• Changes to the KPIs from the draft plan<br>• An alteration to the team roles/responsibilities/accountabilities | ☐ | ☐ |
| 2. | The student submitted an e-mail to the project sponsor summarizing the outcomes of the meeting with the project team, including:<br>• Attached the final HR plan for approval<br>• Included at least one learning and development need for the team<br>• Outlined the reasoning behind the learning and development need<br>• Identified how the learning and development will occur<br>• Stated that the learning and development will be organised in the near future<br>• Referred to the rewards and recognition section in the HR plan<br>• Completed the organisation (CBSA) e-mail format in full<br>• Use language and structure in the e-mail appropriate to the context of the e-mail and the recipient<br>• Included the purpose for the e-mail | ☐ | ☐ |

| | | | |
|---|---|---|---|
| | • Only include relevant information in the e-mail | | |

## Task instructions (for the student) Part C: Team training

In this task, you will identify and organise team training and learning and development activities and inform your team of your actions.

| **Case study:** |
| --- |
| The departmental managers have responded to your e-mails.<br>They have agreed to release their staff so long as you identify exactly when they are needed and remind them a week out from the time they are required.<br><br>You have been asked to identify and organise learning and development activities to enhance team performance, inform the team of your actions and outline how they will access the training, learning and development. |

Complete the following steps:

### Steps

You will need to document **three different areas of training and development activities** to enhance team performance. To do this:

1. Research both external and internal sources that the training the team is to undertake to develop each of the areas identified. The learning and development activities are at no cost to the project or the team member as they are covered by HR policies for professional development.
2. Decide on and document in a method of your choice three different areas the team may benefit from learning and development activities and how the learning and development will enhance the way your team will work together
3. Check the policy and procedure to ensure any external training is within the allowable individual professional development budget
4. Document comparison between the sources of training with all relevant information (e.g. time, place, objective and goals of training, how and who will arrange it etc.) and select the method that will best suit your team. You must identify different training methods for each area of learning and development to be undertaken by the team.
5. Once you have completed the above, use the e-mail template to write an **e-mail to the team** outlining their learning and development requirements. Inform the team of your actions and the need for them to report back to the team on how they found each activity and how it helped/will help them in improving the team performance after they complete their training

   Your assessor will be looking to see if the e-mail has been written to suit the audience, context and purpose using

   - the CBSA format
   - grammatically correct English and correct spelling
   - appropriate language for written communication with the audience
   - paragraphs, sentences and bullets where it enhances understanding of what is being communicated
   - the purpose of the e-mail.

| | |
| --- | --- |
| To: | |
| From: | |
| Date/time: | |
| Subject | |

Salutation

E-mail body

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

[www.cbsa.com.au](http://www.cbsa.com.au)

CBSA

### Submission instructions

Submit your assessment via the LMS.

## Assessor instructions Part C: Team training

### Purpose of task

This part is designed for the student to demonstrate they can use an appropriate method to communicate ongoing professional development and learning and development activities with their team and advise their team of their actions.

### Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

The student must complete the following:

- Document using a method of their choice, three different areas the team may benefit from learning and development activities. Learning and development options might be around effective distance communication, conflict, team building, problem-solving, and respect for others and their opinions.
- Outline a different training method for each of the three areas of learning and development, e.g. may be online through an external source, face-to-face, external training, coaching in a meeting, team project blog, team project social media page, YouTube, online or face-to-face workshop.
- Include:
  - learning and development that is directly related to enhancing the performance of the project team
  - a description of how each learning and development activity will enhance team performance
  - how the learning and development will enable the team, who are not in the same location, to work together effectively.
- Select training and development methods that clearly show they have taken into account that one member of the team is in Adelaide and full-time while other members of the team are flexible in working on their team tasks while completing their other work commitments.
- Write an e-mail informing their team of the learning and development activities and how to access them, including:
  - using an appropriate format for the e-mail, e.g. CBSA e-mail form
  - addressing the communication to the appropriate recipients

- including a suitable date, subject and complimentary close
- outlining the purpose of the communication, e.g. team learning and development activities to be undertaken by all team members
- outlining any action to be taken and by whom, e.g. all team members, by the end of year/mid year etc.
- using language suitable for the audience
- using punctuation, sentences and bullets to improve understanding of content.

An example e-mail is provided. Accept variations of the following.

To: all team members@cbsa.com.au

From: Zane O'Brien [zane.obrien@cbsa.com.au]]

Date/time: Wednesday 9.15 p.m.

Subject: Team learning and development

Hi team,

I know this will be a busy year getting the project up and running and finishing it within budget and timelines. Additionally, we have a team member – sorry, Paris! – in Adelaide. We need to make sure we work as a team and are inclusive of all members in anything we do.

Therefore, the team learning and development activities I have arranged for the team will all be available online through the CBSA intranet at no cost to any of the team. Please let me know if you cannot access any learning options or if there is a cost to you or your department, and I will attend to this.

There are three learning and development activities. You will be able to do the learning and development activities at any time suited to you and in any location, including at home or at weekends if you wish!! – however, this should not be necessary as the activities are only ten minutes in length and should be able to be completed during work hours.

When you access the activities, your entry and completion will be recorded, and a record will be placed on your HR file under your professional development requirements for the year.

You will also be required to share your experiences with the team in the team meeting following your completion of the team activities and how they have/will help you with working in a team and improving team performance.

- The learning and development and training will be on team communication between different locations, respecting others' views and opinions and dealing with a conflict between team members.

OK – now to the activities and how to access them.

- IT will be sending you an e-mail explaining how to access the learning and development within the next week for the team communication between different locations. Please log on so that you are registered within a week of receiving the e-mail, even if you do not begin the training. Timewise you will need to complete the training by the end of July this year
- You will need to register for the online course for respecting other people's views. Please contact Tracey White, Trainer, on 0476 897 999 to register. This course is going to be run on May 25th at 2.00 p.m. Although I have let Tracey know you will all be attending, you must still register
- The conflict between team members is a course to be taken through a TAFE near you. Please contact me for further details. The course is the same regardless of the state you are in.

Let me know if any of this is going to be an issue for you with the project and your other department workloads.

Cheers, and I look forward to hearing how the learning and development you undertake will benefit our team performance during our team meetings!

Zane O'Brien

Website Design 3D pot making venture for CreatePots – Human Resources Consultant

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

Review all evidence and mark using the assessment checklist and assessment marking criteria.

## Marking criteria Part C: Team training

### Assessment submission checklist

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

| **Part A: Interview and agree on successful applicants** | | |
|---|---|---|
| 1. | Document using a method of your choice | ☐ |
| 2. | E-mail to all team members | ☐ |

### Assessment marking criteria

Assessor instructions: All sections must be completed.

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is not yet satisfactory (NYS) and requires resubmission.

| | **MARKING CRITERIA** | **Satisfactory (S)** | **Not Yet Satisfactory (NYS)** |
|---|---|---|---|
| 1. | The student submitted a document to identify and organise training and development activities for the project team members, including:<br>• Documented three different areas the project team members might benefit from learning and development activities<br>• Documented how the learning and development activities enhance the way the project team will work together<br>• Researched and documented sources of training, learning and development activities with all the relevant information<br>• Compared different sources and methods of training, learning and development | ☐ S | ☐ NYS |
| 2. | Communicate with the project team by:<br>• *Writing an informative e-mail to the project team about team training, learning and development to enhance team performance*<br>• *Explaining the team members will need to report back on their training at team meetings and how it helped/helps with improving team performance*<br>• *Outlining when and how the project team will access the training*<br>• *Using the organisation (CBSA) e-mail format and completing it in full*<br>• *Using language and structure in the e-mail appropriate to the context of the e-mail and the recipient*<br>• *Including the purpose of the e-mail*<br>• *Only including relevant information in the e-mail*<br>• Using appropriate structure, e.g. paragraphs, sentences, bullets | ☐ S | ☐ NYS |

Congratulations, you have reached the end of Assessment 5!