



BSBOPS402

Coordinate business operational plans

Assessment 2 of 3

Case study



Assessment Instructions

Task overview

This assessment task is divided into four [4] tasks. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Learning Resources
- Orientation Session Presentation
- Launch New Fitness Program - Operational Plan
- Launch New Fitness Program - Resource Requirement Proposal
- Recommendations for Variation Presentation
- Support Plan Template
- Sydney Staffing
- Organisational Chart
- Recruit and Onboard Employees – Policy and Procedures
- Acquiring Physical Resources and Services – Policy and Procedures
- Unsatisfactory Project Performance – Policy and Procedures
- Maintain Records for Operational Plans – Policies and Procedures

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.

Case study

For this assessment, you will play the role of Jacinta Scotts, Sydney Centre Manager [Bounce Fitness].

Bounce Fitness is made up of four fitness centres. The Head office is currently established in Cairns, Queensland. The other centres are in Brisbane [Queensland], Sydney [New South Wales] and Melbourne [Victoria].

There is a new program that has become increasingly popular in the last few months called Functional Fitness Fusion, and many gym members have expressed interest in it, but Bounce Fitness does not offer classes for this program yet. So, you and your team decided to launch this new fitness program in the Sydney Centre.

You will be required to prepare, implement and review an operational plan to launch the new fitness program.

Below are the details of what was discussed with your team members in regard to the Functional Fitness Fusion that will help you with the preparation, implementation and review of the operational plan:

Operational Plan: New Fitness Program Launch - Functional Fitness Fusion

Objective: Successfully introduce a new fitness program to attract a wider range of members and enhance the gym's offerings.

Program Description: The "Functional Fitness Fusion" program is designed to offer a comprehensive and dynamic approach to fitness by combining functional training, HIIT (High-Intensity Interval Training), and flexibility exercises.

Requirements:

You will need to hire a new fitness instructor who specialises in this area as no one can currently develop and teach the class. You will need someone with In-depth knowledge and experience in functional training principles, including understanding movement patterns, body mechanics, and exercises that mimic real-life activities. The instructor will need to have at least 3 years of experience in HIIT and functional training and a Certificate III in Fitness or equivalent.

You will also need to ensure a room is available for the class requirements. For 20 people to attend such a class, you will need at least a 50m² room.

The equipment required is loop bands, dumbbells, kettlebells, medicine balls, jumping ropes, and yoga mats.

Implementation:

Bounce Fitness will implement a program testing strategy to launch the new fitness program. A specific group of members will participate in the pilot program. This group should be diverse in fitness levels and goals to capture a range of perspectives. By utilising the pilot program and gradual rollout approach, Bounce Fitness will effectively introduce and refine a new fitness program, enhancing member engagement and ensuring a successful launch.

The first pilot program needs to be rolled out in 3 months. The pilot program will run for 3 weeks, with 2 classes per week. After these 3 weeks, feedback will be gathered and analysed before the new fitness program becomes available to all gym members.

Budget: \$5,000

Task 1

- a) Your first task is to consult Martin Saunders, the assistant manager, and Laura Irish, the Manager of HR, to identify the resource requirements for the operational plan. Before the meeting, you will need to write down the requirements you identified after reading the case study in the space below:

Assessor instructions: Students's responses must reflect the content in the sample answer below.

Resource Requirements

Human resources: <<Insert your response here>>

Hire a new fitness instructor who specialises in this area, as no one can currently develop and teach the class.

Physical resources (Equipment): << Insert your response here>>

The equipment required is loop bands, dumbbells, kettlebells, medicine balls, jumping ropes, and yoga mats.

Space requirements: <<Insert your response here>>

Ensure a room is available for the class requirements. For 20 people to attend such a class, we will need at least a 50m² room.

During the meeting, you will need to:

- Discuss the resource requirements you identified that are required for the new program
- Clarify that there is a room available according to the requirements
- Discuss the rest of the physical equipment required and identify what is missing and what will need to be acquired. Ask Martin to confirm what is available and what is not.
- Confirm exactly what will be purchased and what the space requirements will be.
- Discuss the need for the new fitness trainer and the skills and attributes that he or she will need to possess for the successful implementation and delivery of the new program.
- Ensure the language used is suitable for your audience.

The meeting must not exceed 20 minutes in duration.

Assessor instructions: Students must participate in a role play with two [2] others following the instructions provided.

Role play instructions

In this task, you will participate in a role/play meeting with two [2] others. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.

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

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

Peers 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.

Participants' briefing instructions:

Martin Saunders, Assistant Manager

- Listen to the student discussing the requirements.
- Confirm that all equipment is available except for the loop bands and the yoga mats. Suggest that 20 (packs of 5) of loop bands are being purchased and 20 new yoga mats.
- When the student is discussing the skills and attributes of the new fitness trainer, add your ideas in regards to his soft skills: for example, being approachable, empathetic, and able to build rapport with participants,
- Be polite and speak clearly

Laura Irish, HR Manager

- Listen to the student discussing the requirements.
- When discussing the room availability, mention the importance of ensuring that enough space is allocated for participants to safely move and use these items without overcrowding. And suggest that a 70 m² room is available.
- In regards to the new fitness trainer, request from the student to send you a set of criteria in order to develop a job advertisement.
- Be polite and speak clearly

Recording instructions

Your role play must be recorded with all participants 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 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.

ASSESSOR OBSERVATION CHECKLIST

Students are required to upload a video of themselves and two [2] others engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 20 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO		ASSESSOR COMMENTS
Task checklist			
Did the student:			
<ul style="list-style-type: none">Discuss the resource requirements you identified that are required for the new program			<i>The student must discuss all the requirements mentioned in the case study, including physical and human resources and space requirements</i>
<ul style="list-style-type: none">Clarify that there is a room available according to the requirements			<i>The student must clearly state that there is a room available to accommodate 20 participants</i>
<ul style="list-style-type: none">Discuss the rest of the physical equipment required and identify			<i>The student must mention all the equipment requirements: loop bands, dumbbells, kettlebells, medicine balls, jumping ropes,</i>

what is missing and will need to be acquired. Ask Martin to confirm what is available and what is not.				<i>and yoga mats. The student will also need to ask Martin to confirm the availability of the resources.</i>
<ul style="list-style-type: none"> Confirm exactly what will be purchased and what the space requirements will be 				<i>The student will need to confirm exactly what will need to be purchased and the space requirements.</i>
<ul style="list-style-type: none"> Discuss the need for the new fitness trainer and the skills and attributes that he or she will need to possess for the successful implementation and delivery of the new program. 				<i>The student must discuss the need to hire a new fitness trainer and the skills and attributes the new trainer must possess.</i>
<ul style="list-style-type: none"> Ensure the language used is suitable for your audience. 				<i>The student must use language appropriate for the audience. E.g.: professional and clear tone and respectful language.</i> <i>Also, they must take into consideration the suggestions and input provided by the stakeholders.</i>

b) Now, you will need to develop an operational plan for launching the New Fitness Program using the **Operational Plan** template provided in your resources. Instructions on how to develop the plan are included in each section of the Operational Plan template. Once you complete your plan, you will need to save it as **Launch New Fitness Program - Operational Plan** and submit it. **To identify and assign responsibilities, you will need to use the Sydney Staffing and Organisational Chart.**

Assessor instructions: Students must develop an operational plan for launching the New Fitness Program using the **Operational Plan** template provided in their resources. Instructions on how to assess the competency of the student's plan, as well as sample answers, are included in each section of the **Launch New Fitness Program - Operational Plan - Assessor Guide**.

c) The HR Manager has requested that you develop a Resource Requirement Proposal to be presented to all the relevant stakeholders for you to get approval for acquiring the resources needed for the successful implementation of the plan. Use the **Resource Requirement Proposal** template provided in your resources. Once you complete your proposal, you will need to save it as **Launch New Fitness Program - Resource Requirement Proposal** and submit it. Bounce Fitness is using the [Commercial Fitness Equipment | Commercial Grade Gym Equipment for Sale](#) to purchase all the gym equipment. To identify and assign responsibilities, you will need to use the **Sydney Staffing and Organisational Chart**.

Assessor instructions: Students must develop a Resources Requirement Proposal using the template provided. Instructions on how to assess the competency of the student's plan, as well as sample answers, are included in each section of the **Launch New Fitness Program - Resource Requirement Proposal - Assessor Guide**.

d) You will need to participate in a role-play with the HR Manager and the Finance Manager of Bounce Fitness to present your Resource Requirement Proposal

During the meeting, you will need to:

- Discuss every part of your proposal
- Explain that you had a meeting with the HR Manager and the Assistant Manager, and you identified and agreed on the resource requirements.
- Explain how you conducted your research and why you chose the specific resources, products, space.
- Ensure the language used is suitable for your audience.

The meeting must not exceed 15 minutes in duration.

Assessor instructions: Students must participate in a role play with two (2) others following the instructions provided.

Role play instructions

In this task, you will participate in a role/play meeting with two (2) others. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

Peers 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.

Participants' briefing instructions:

Steve Brinkley, Finance Manager

- Listen to the student discussing the requirements.
- Approve the proposal
- Be polite and speak clearly

Laura Irish, HR Manager

- Listen to the student discussing the requirements.
- Approve the proposal
- In regards to the new fitness trainer, request from the student to send you a send of criteria in order to develop a job advertisement as discussed in your previous meeting
- Be polite and speak clearly

Recording instructions

Your role play must be recorded with all participants 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 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.

ASSESSOR OBSERVATION CHECKLIST

Students are required to upload a video of themselves and two [2] others engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.				
ACTIVITY	SATISFACTORY YES / NO		ASSESSOR COMMENTS	
Task checklist				
Did the student:				
<ul style="list-style-type: none"> Discuss every part of their proposal 				<i>The student must discuss every part of their proposal, including physical and human resources and space requirements</i>
<ul style="list-style-type: none"> Explain that they had a meeting with the HR Manager and the Finance Manager, and they identified and agreed on the resource requirements 				<i>The student must refer to the previous meeting they had with the Hr Manager and the Assistant Manager and mention the agreement between the parties.</i>
<ul style="list-style-type: none"> Explain how you conducted your research and why you chose the specific resources, products, space. 				<i>The student must explain the process they followed to research and decide on the products, services and space that will be required.</i>
<ul style="list-style-type: none"> Ensure the language used is suitable for your audience. 				<i>The student must use language appropriate for the audience. E.g.: professional and clear tone and respectful language.</i> <i>Also, they must take into consideration the suggestions and input provided by the stakeholders.</i>

Task 2

a) As per Laura Irish, the HR Manager’s request to assist with recruiting, you will need to develop a set of criteria for the job description of the new fitness trainer that needs to be hired. Read the case study, analyse the requirements and write five (5) criteria you think are essential for the position in the table below.

Assessor Instructions: Students will need to identify and provide five (5) criteria that they find essential for the role based on the information they have collected so far.

Students' wording may vary, but the identified criteria need to relate specifically to the case study and requirements of the new fitness program. Criteria relating to soft skills such as: friendly and approachable will also be accepted as correct, as these were suggestions provided by Martin Saunders during Task 1a Role play.



Criteria

1. <<Insert your response here>>
2. <<Insert your response here>>
3. <<Insert your response here>>
4. <<Insert your response here>>
5. <<Insert your response here>>

Sample answer:

1. In-depth knowledge and experience in functional training principles
2. Approachable, empathetic, and able to build rapport with participants
3. Understanding movement patterns and body mechanics
4. Certificate III in Fitness or equivalent
5. Three (3) years of experience in HIIT and functional training

- b) After 2 weeks, a new fitness instructor was hired, and according to the **Recruit and Onboard Employees – Policy and Procedures**, it is your responsibility as the Centre Manager to conduct the orientation session of the onboarding procedure.

You will need to participate in a role-play with John Smith and have an orientation session covering company culture, policies, and procedures. The HR department has created an **Orientation Session Presentation** that you must go through with the new employee.

During the meeting, you will need to:

- Go through every slide of the Orientation Session Presentation
- Ask John Smith if he has any questions and address them.
- Confirm John Smith knows what the next steps will be moving forwards
- Ensure the language used is suitable for your audience.

The meeting must not exceed 15 minutes in duration.

Assessor instructions: Students must participate in a role play with one (1) other, following the instructions provided.

Role play instructions

In this task, you will participate in a role/play meeting with one (1). These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

Peers 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.

Participants' briefing instructions:

John Smith, New Fitness Instructor

- Listen to the student presenting the Orientation Session Presentation.
- Ask questions to clarify sections that you did not understand
- Confirm your understanding of the next steps
- Be polite and speak clearly

Recording instructions

Your role play must be recorded with all participants 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 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.

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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.

ASSESSOR OBSERVATION CHECKLIST

Students are required to upload a video of themselves and one (1) other engaged in a short meeting.
 The participants must be fully briefed as outlined in the role play instructions.
 The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS
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Task checklist

Did the student:			
<ul style="list-style-type: none"> Go through every slide of the Orientation Session Presentation 			<i>The student must discuss every part of the Orientation Session Presentation</i>
<ul style="list-style-type: none"> Ask John Smith if he has any questions and address them. 			<i>The student must address any questions in relation to the [resentation</i>
<ul style="list-style-type: none"> Confirm John Smith knows what the next steps will be moving forwards 			<i>The student must confirm John's understanding of the next steps</i>
<ul style="list-style-type: none"> Ensure the language used is suitable for your audience 			<i>The student must use language appropriate for the audience. E.g.: professional and clear tone and respectful language.</i>

c) According to the **Acquiring Physical Resources and Services – Policy and Procedures**, after your Resource Requirement Proposal is approved, you will need to send an email to Steve Brinkley, the Finance Manager, attach your proposal and request them to acquire the physical resources for your operational plan. In your email, you must include:

- The purpose of your email
- The due date you would like the resources to be acquired by
- A reference to the attachment
- Ensure your writing style matches the purpose of your email and the audience

To write your email, use the template provided below.

[Approx. word count: 50 – 100 words]

Assessor Instructions: The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager.
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Acquiring Physical Resources
Attachments:	<<Add the name of any attachments here>> Resource Requirements Proposal

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Steve,

I am sending you this email to inform you of the physical resources that will need to be acquired for the new fitness program.

The resources were discussed and agreed upon during our meeting last week.

According to the operational plan's timeframes, we will need to have the resources by the end of this week.

I have attached the approved Resource Requirements Proposal with all the details about the products that need to be purchased.

If you have any questions, please do not hesitate to contact me.

Regards,

Jacinta Scotts

Centre Manager

Regards,

<<Add your name here>>

<<Add your job position here>>

d) According to the **Acquiring Physical Resources and Services – Policy and Procedures**, you will need to access and update the **Classes Equipment Use and Maintenance Log** to support efficient, cost-effective and safe use of resources.

Assessor Instructions: The students will need to fill out the **Classes Equipment Use and Maintenance Log**. More instructions for the assessor, as well as sample answers, are included in the **Classes Equipment Use and Maintenance Log – Assessor Guide**.

e) The Finance Department, which is currently dealing with purchasing the requested equipment, advised you that the supplier does not have the equipment in stock, and it will take 4 extra weeks to organise the delivery of the products. Due to the delay, they offered a 20% discount to compensate Bounce Fitness for the inconvenience caused. This will now cause an issue with the implementation of the operational plan. You will need to have a meeting with Martin Saunders, the Assistant Manager, to discuss the adjustments to the operational plan.

During your meeting, you will need to:

- Discuss the issue
- Provide suggestions on how to encounter the contingency
- Suggest that Martin will be monitoring the delivery of the new equipment
- Agree on how you will manage the contingency
- Update the **Launch New Fitness Program – Operational Plan** (contingencies and action plan sections)

After your meeting, you will need to save and submit the updated plan separately as **Updated Plan – Contingencies**.

Assessor instructions: Students must participate in a role play with one [1] other, following the instructions provided.

Instructions in regard to the updated operational plan are included in the **Launch New Fitness Program – Operational Plan – Assessor Guide**.

Role play instructions

In this task, you will participate in a role/play meeting with one [1]. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

Peers 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.

Participants' briefing instructions:

Martin Saunders, Assistant Manager

- Listen to the student presenting the issue.
- Offer your opinion in regards to how the contingency can be managed
- Agree on how the contingency should be managed
- Accept the suggestion to monitor the delivery of the equipment.
- Be polite and speak clearly

Recording instructions

Your role play must be recorded with all participants 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 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.

ASSESSOR OBSERVATION CHECKLIST

Students are required to upload a video of themselves and one [1] other engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS
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Task checklist

Did the student:			
<ul style="list-style-type: none"> Discuss the issue 			<i>The student discussed the issue as was presented in the case study</i>
<ul style="list-style-type: none"> Provide suggestions on how to encounter the contingency 			<i>The students provided suggestions on how to encounter the contingency</i>
<ul style="list-style-type: none"> Suggest that Martin will be monitoring the delivery of the new equipment 			<i>The student politely asked Martin to monitor the delivery of the new equipment</i>
<ul style="list-style-type: none"> Agree on how you will manage the contingency 			<i>The student agreed on how the issue will be managed with Martin</i>
<ul style="list-style-type: none"> Update the plan (contingencies and action plan sections) 			<i>The student updated the plan according to the instructions provided</i>
<ul style="list-style-type: none"> Ensure the language used is suitable for your audience 			<i>The student must use language appropriate for the audience. E.g., professional and clear tone and respectful language.</i>

Task 3

Case Study

The new fitness program was tested as planned with a small group of people for 3 weeks, 2 classes per week. The participants enjoyed the classes overall, but they felt that the fitness level of the participants was not taken into consideration. Some of the exercises were too difficult, and beginners could not keep up. The participant said that the fitness instructor was very approachable and helpful and explained each exercise clearly. The equipment used and the space provided were good. The suggested time for the delivery of the class, which was 5:30 p.m., was a big problem as many participants were struggling to get there on time after work. That resulted in a 20 % drop in attendance after the third class. The following responses were collected through the feedback:

Did the class meet your expectations?

62 % said no

18 % said yes

20% I am not sure

Would you recommend this class to your friends?

57 % said no

41 % said yes

2 % said I am not sure

- a) Fill out the productivity and performance table by collating the information provided in the case study and determining the operational and productivity performance.

Assessor Instructions: The students will need to fill out the table below. Their responses will need to reflect the content in the sample answer provided below.

Productivity and Performance Table	
Rate the following four [4] aspects of the plan according to the information provided in the case study:	
The fitness instructor	Satisfactory <input checked="" type="checkbox"/> Not Satisfactory <input type="checkbox"/>
The equipment used and the space	Satisfactory <input checked="" type="checkbox"/> Not Satisfactory <input type="checkbox"/>
The class' content	Satisfactory <input type="checkbox"/> Not Satisfactory <input checked="" type="checkbox"/>
The suggested time for the delivery of the class	Satisfactory <input type="checkbox"/> Not Satisfactory <input checked="" type="checkbox"/>
Answer the following two questions according to the information provided in the case study:	
Did it meet the majority of participants' expectations	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Will the majority of participants recommend it to friends?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

Overall, were the productivity and performance of the plan satisfactory? Did the plan achieve its objective?

Yes No

Explain the reason for your response.

[Approx. word count: 20 – 50 words]

<<Insert your response here>>

The productivity and the performance of the plan were not satisfactory as it did not achieve its objective of attracting a wider range of members.

- b) You will need to create two [2] KPIs for every aspect of the plan and assess its performance based on this. Use the table below to complete this task.

Assessor Instructions: The students will need to fill out the table below.

The KPIs they will select for each aspect may vary, but they will need to ensure that align with the objectives of the plan.

The suggestions for the KPIs that were not met may vary, but they need to be relevant to the KPI they refer to.

The student must identify “Class’ content and delivery time” as not being met in order for this to be a satisfactory response.

Aspect	KPI (Key Performance indicator)	Was it met?	Suggestions for the KPIs that were not met
The fitness instructor	<<Insert your response here>> <ul style="list-style-type: none"> Approachable and helpful Provided clear instructions and guidance 	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	<<Insert your response here>>
The equipment used and the space	<<Insert your response here>> <ul style="list-style-type: none"> The equipment is clean and not worn out The space is enough for safe delivery of the class 	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	<<Insert your response here>>
The class’ content and delivery time	<<Insert your response here>> <ul style="list-style-type: none"> The class content is designed for all fitness levels The delivery times take into 	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	<<Insert your response here>> <ul style="list-style-type: none"> Ask the fitness instructor to reassess the content of the class and modify it to meet different fitness levels

	consideration participants' needs		<ul style="list-style-type: none"> Discuss and change the class time based on the feedback received from the participants or multiple class times for different groups
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c) According to **Unsatisfactory Project Performance – Policy and Procedures**, the first step to rectify unsatisfactory performance is to organise a meeting to discuss what was identified and rectify it with all the relevant stakeholders. Use the email template below to send an email to Martin Saunders, the Assistant Manager, and John Smith, the Functional Fitness Fusion. In your email:

- Explain that you reviewed the feedback received and create a table with KPIs for each aspect of the plan
- Attach the KPIs table and inform them of your attachment
- Request a meeting to discuss unsatisfactory performance and rectify the issues.
- Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 50 – 100 words]

Assessor Instructions: The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Martin Saunders, Assistant Manager John Smith, Fitness Instructor
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> KPIs
Attachments:	<<Add the name of any attachments here>> KPIs Table

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Martin and John,

After an analysis of the feedback received, I created a KPIs table to assess the performance of the plan, and it was identified that some aspects of the plan did not perform satisfactorily.

I have attached the KPIs table to this email for your review.

I would like to request a meeting to discuss the performance of the New Functional Fitness Fusion Class and rectify the issues. Please let me know of your availability to organise the meeting.

If you have any questions, please do not hesitate to contact me.

Regards,

Jacinta Scotts

Centre Manager

Regards,

<<Add your name here>>

<<Add your job position here>>

d) John reached out to you and said that he is very stressed and overwhelmed with the outcome, and he would like to have a meeting with you to get your support and guidance on how to approach the situation. During your meeting, you will need to:

- Actively listen to John's explanation of his feelings
- Help him open up and feel safe to express himself
- Set up a plan with him using the **Support Plan Template**
- Agree on how you will proceed moving forward
- Ensure the language you use is suitable for the audience

After the meeting, you will need to save and submit the plan as **Support Plan – John**.

Assessor instructions: Students must participate in a role play with one [1] other, following the instructions provided.

Instructions in regard to the Support Plan Template that will be used are included in the **Support Plan – Assessor Guide**.

Role play instructions

In this task, you will participate in a role/play meeting with one [1]. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

Peers 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.

Participants' briefing instructions:

John Smith, Fitness Instructor

During the meeting, you will need to show signs of stress and anxiety, such as taping your fingers and avoiding eye contact.

- Discuss how feel about the negative outcome of the program's content.
- Go through the Support Plan with the student and decide on each section together
- Agree on how you will proceed moving forward
- Be polite and speak clearly

Recording instructions

Your role play must be recorded with all participants 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 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.

ASSESSOR OBSERVATION CHECKLIST

Students are required to upload a video of themselves and one (1) other engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS
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Task checklist

Did the student:			
<ul style="list-style-type: none"> Actively listen to John's explanation of his feelings 			<i>The student will need to show signs of active listening, such as nodding, making eye contact and using verbal cues such as "I see," "I understand," or "Tell me more."</i>
<ul style="list-style-type: none"> Help him open up and feel safe to express himself 			<i>The students use open-ended questions to reassure John that he can safely express himself and avoid judgement or criticism.</i>
<ul style="list-style-type: none"> Set up a plan with him using the Support Plan Template 			<i>The student will need to set up a plan with John, going through all the sections</i>
<ul style="list-style-type: none"> Agree on how you will proceed moving forward 			<i>The student will need to agree on the steps moving forward with John</i>
<ul style="list-style-type: none"> Ensure the language you use is suitable for the audience 			<i>The student must use language appropriate for the audience. E.g., professional and clear tone and respectful language.</i>

Task 4

Case Study

After your meeting with Martin and John (organised in Task 3c – email), you decided the following:

- The program will have to be redesigned to address all fitness levels. John will work on recreating the content. This action will take 5 working days. That will result in delaying the final launch of the program to a wider audience. The plan is already 4 days overdue.
- Martin will rearrange the class schedule, offering 2 morning classes and 2 evening classes per week. This will result in more sessions for the fitness instructor and an adjustment to his contact and payment. John is currently getting paid for 2 classes per week.
- You agreed that it is a good idea to try the new approach for an extra 2 weeks. With the adjustments specified, you will be over budget by \$340.

- a) You will need to develop recommendations for variation to the operational plan and present them to Steve Brinkley, the Finance Manager and Laura Irish, the HR Manager.

To develop your presentation, you will need to use the **PowerPoint Presentation Template** provided. In your presentation, you will need to include all the points mentioned in the case study.

Your presentation should not exceed 6 slides. You will need to have the following:

- Title page slide
- Presentation of the KPIs that were not met
- Recommendations for variation
- Explanation of how the recommendations of variation will affect the timeframes and the budget of the plan
- Closing slide – You can design this slide by asking if the audience has any questions, feedback
- Save your presentation as **Recommendations for Variation Presentation**.

Assessor Instructions: Students will need to create a PowerPoint Presentation using the template provided. In their presentation, they will need to cover all the points provided in the instructions for this task. More instructions for the assessor are provided in each slide of the **Recommendations for Variation Presentation – Assessor Guide**.

- b) You will need to send an email to Steve Brinkley, the Finance Manager and Laura Irish, the HR Manager and attach your presentation to gain approval for your recommendations for variation. Use the template below to write your email. In your email, you should:

- Explain the reason for your email
- Attach the presentation and inform them of your attachment
- Request their review and approval of the recommendations for variation presented to them.
- Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 50 – 100 words]

Assessor Instructions: The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager Laura Irish, HR Manager
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Recommendations for Variation
Attachments:	<<Add the name of any attachments here>> Recommendations for Variation Presentation

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Steve and Laura,

I sending you this email to inform you that after reviewing the performance of the operational plan and meeting with Martin and John, I developed recommendations for variation presentation.

I have attached the presentation to this email for your review.

I would like to request your review and approval of the recommendations for variation presented to you.

If you have any questions, please do not hesitate to contact me.

Regards,

Jacinta Scotts

Centre Manager

Regards,

<<Add your name here>>

<<Add your job position here>>

- c) Steve and Laura approved your recommendations for variation. According to the **Maintain Records for Operational Plans – Policies and Procedures**, you will now need to update the Recommendations for Variation section in the Updated Plan – Contingencies. You will need to save and submit the updated plan separately as **Updated Plan – Recommendations for Variation**.

Assessor Instructions: The students will need to update the Recommendations for Variation section in the Updated Plan – Contingencies.

Instructions in regard to the updated operational plan are included in the **Launch New Fitness Program – Operational Plan – Assessor Guide**.

- d) After three weeks of the implementation of the recommendations, the functional fitness fusion program was still underperforming, and after a meeting with Martin and John, you decided to cancel it. John will still stay on board, delivering the HIIT class that attracts more and more participants each week.

You will need to send an email to Steve Brinkley, the Finance Manager and Laura Irish, the HR Manager and inform them of the operational performance of the plan and your decision. In your email, you should:

- Discuss the operational performance of the Functional Fitness Fusion program
- Inform them of your decisions and ask for their approval
- Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 50 – 100 words]

Assessor Instructions: The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager Laura Irish, HR Manager
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Cancellation of the Functional Fitness Fusion Program
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Steve and Laura,

I sending you this email to inform you that the operational performance of the new Functional Fitness Fusion Program is still unsatisfactory, and after a meeting with Martin and John, we decided to cancel it.

I would like John to stay on board as the HIIT classes have become very popular, and HIIT is within his area of expertise.

I would like to request your approval for these two actions.

If you have any questions or you would like to discuss further, please do not hesitate to contact me.

Regards,

Jacinta Scotts

Centre Manager

Regards,

<<Add your name here>>

<<Add your job position here>>

Assessment checklist:

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

1	Task 1 a) Role play b) New Functional Fitness Fusion - Operational Plan c) Resource Requirements Proposal d) Role Play Presentation	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2	Task 2 a) List of criteria b) Role play - Orientation c) Email d) Equipment Use and Maintenance Log e) Role Play - Updated Plan – Contingencies	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3	Task 3 a) Operation productivity and performance table b) KPIs table c) Email d) Role Play and Support Plan	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4	Task 4 a) Recommendations for Variation – PowerPoint b) Email c) Updated Plan - Variation Recommendations d) Email	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



Congratulations you have reached the end of Assessment 2!

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