ASSESSOR GUIDE

MANAGE MEETINGS

Assessment 3 of 3

Project/Roleplay

Assessment Details

Task overview
This assessment task is divided into two parts:

- **Part A: Prepare for a short informal meeting**
  In this task, you must prepare for an informal meeting by:
  - developing a meeting agenda (BSBTWK503_03_Agenda_Student name)
  - preparing an Email to distribute the agenda to meeting participants (BSBTWK503_03_Agenda email_Student name)
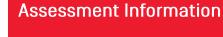- **In Part B: Chair a short informal meeting**
  In this task, you must:
  - Chair the short informal meeting
  - Email participants of the meeting outcomes (BSBTWK503_03_Outcomes_Student name).

Additional resources and supporting documents

To complete this assessment, you will need:

- Access to your learning materials
- Access to a computer and the internet
- Access to Microsoft Word (or a similar program)
- Access to a mobile phone (Part B)
- CBSA Meeting Agenda Template (accessible via the LMS)
- CBSA Meeting Minutes Template (accessible via the LMS)
- CBSA Email Template (accessible via the LMS)
- Two peers/classmates to play the role of the other informal meeting participants (Part B)

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.

Part A: Prepare for an Informal Meeting

To begin this part, read the following email and then complete the tasks that follow. You are to continue playing the role of the HR Manager, Glenda Williams.

To:	Glenda Williams (glenda.williams@cbsa.com.au)
From:	Gavin Stead (gavin.stead@cbsa.com.au)
Date/time:	Wednesday 12:27 p.m.
Subject:	Team Building Exercises

Good afternoon Glenda,

Following a recent management meeting, it was decided that the organisation needed to introduce some activities to ensure that team morale remains positive. Please set up a social calendar so your team can do some fun things out of work hours to build team morale.

Please meet with your team informally to get some ideas. They should be inexpensive (under $30 per person) and not too far away from the local area.

Each social activity can be held on the last Friday of the month, and I want to try this for the next three months to see how it goes.

Kind regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

Steps

Based on the email, you are to complete the following tasks:

Step 1

Set up the meeting.

- You will need to create a meeting agenda using the Meeting Agenda Template, identifying at a minimum:
    - o the required attendees from your department,
    - o items for discussion, and
    - o the location, date, and time of the meeting.
- The purpose of this meeting is to set up a social calendar for your team. You will need to research the internet and find two social activities that might be fun for your team to do after work. Print out copies of your suggested activities so you can distribute them at the meeting.

Step 2

- You need to email the agenda to your team members to notify them of the meeting. You should use the organisation's Email Template, ensuring your email details the relevant information, including:
    - o specifying who the email is to
    - o specifying who the email is from
    - o specifying the date and time you sent the email
    - o specifying the subject
    - o specifying that the meeting agenda is attached
    - o the body of the email detailing the purpose of the meeting
    - o requesting your attendees to confirm their availability.
- You must also copy Gavin Stead into the email to verify the meeting requirements with him.

To:	[enter text]
From:	Glenda Williams (glenda.williams@cbsa.com.au)
Date/time:	[enter text]
Subject:	[enter text]
Attachment:	[enter title of attachment or delete]

To [enter text],

[enter body of email]

The email must specify:

- that the email be delivered to their two team members (Ian Banks and Zane O'Brien) and copy Gavin Stead in
- that the email is from themselves (Glenda Williams)
- the date and time that they sent the email
- a relevant subject (for example, social calendar, social activities, team meeting or similar)
- that the Meeting Agenda is attached
- students must complete the message body of the email, including the purpose of the meeting (to brainstorm potential social activities the team could engage in after hours to build team morale and agree on three suitable activities for the team to undertake)
- a request for attendees to confirm their availability.

Kind regards,

Glenda Williams

Human Resources Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

Assessment checklist:

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

		Y	N
1	Developing a meeting agenda **(BSBTWK503_03_Agenda_Student name)**.	☐	☐
2	Preparing an Email to distribute the agenda to meeting participants **(BSBTWK503_03_Agenda email_Student name)**.	☐	☐

Part A: Assessor Instructions

Purpose of the Part

This part is designed to ensure that the student can meet informally with several people and gain agreement on the outcomes of that meeting.

Reassessment Arrangements

If the student does not demonstrate the skills and knowledge required for this task, you must discuss the areas for further development with the student and arrange a time for reassessment. This may involve rerunning the informal meeting or the student revising their written documentation. Provide the student guidance on what needs to be reassessed and how.

Guidance to Assessors about this Part

The student will continue in the role of Glenda Williams, the HR Manager. Glenda's team consists of Ian Banks (Contract Specialist) and Zane O'Brien (HR Consultant).

Use the following checklist to ensure that the student has sufficiently created a meeting agenda and communicated this to all required parties.

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is unsatisfactory (U) and requires resubmission.

Assessor instructions: All sections/questions must be completed. Refer to the email templates for sample answers and benchmarks.

		S	U

1	**Prepare a meeting agenda in line with the meeting's purpose**
	Look for:
	   • The student must specify a location, date and time for the meeting.
	   • The student identified and interpreted information from the task email
	   • The student must specify the topics for discussion. This could include:
	      ○ introduction of a social calendar to increase staff morale
	      ○ brainstorming ideas for potential activities.
		☐	☐

2	**Identify and invite meeting attendees**
	Look for:
	   • The student must specify the team members involved, Zane O'Brien, Ian Banks and Glenda Williams (self).
	   • Gavin Stead must be copied in
		☐	☐

3	**Contact participants and confirm meeting with them**
	Look for:
	   • The email must:
	      ○ specify that the email is to be delivered to Zane O'Brien, Ian Banks – Gavin Stead is to be copied in
	      ○ specify that the email is from themselves (as Glenda Williams)
	      ○ specify the date and time that they sent the email (which should be three days before when the meeting occurred)
	      ○ specify the subject (it must be relevant to the meeting topic, such as meeting to discuss morale-boosting ideas)
		☐	☐

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is unsatisfactory (U) and requires resubmission.

Assessor instructions: All sections/questions must be completed. Refer to the email templates for sample answers and benchmarks.

		S	U
	- students must complete the message body of the email, including the purpose of the meeting (introduction of a social calendar to increase staff morale, brainstorming ideas for potential activities, etc.) - that the agenda is attached (as this is an informal meeting, there are no style requirements or templates the student must adhere to for this). - request the attendees to confirm their availability - The student follows CBSA procedures by using: - CBSA Email Template		

Part B: Chair an Informal Meeting (Observation)
Steps

Step 1

Now it is time to run your meeting. You are required to run an informal meeting with two of your peers/classmates, who will play the roles of your two team members.

- You must set up the meeting area or login into the virtual meeting before it starts.
- Provide copies of your suggested activities to the other attendees.

Role play instructions

The role-play/meeting must include at least Number [x] participant/s, must not exceed [x] minutes duration and must address all elements of the Observation Checklist below.

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 cannot 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 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.

Step 2

Start the meeting on time. During the meeting, you will need to:

- explain the purpose of the meeting
- put forth your findings and hand out the copies of suggested activities
- encourage your team to brainstorm a range of different ideas (try to get at least two ideas from each person)
- take note of each idea that is put forth
- take a vote of the three best ideas
- take note of the three chosen activities
- be professional and respectful at all times
- keep the meeting on track (even though you don't have an agenda, it is important not to waste time)
- adjourn the meeting.

Note: Even though this is an informal meeting, you should still stick to your responsibilities as the Chair. Remember to use good communication strategies, such as clarifying anything that is not clear, giving your team your full attention, encouraging people to contribute and being positive and supportive of your team's suggestions.

During the meeting, your assessor will be looking to see that you can:

- lead the meeting and ensure it is focused and time efficient
- participate in verbal exchanges using appropriate style, tone and vocabulary for the audience, context and purpose
- listen for specific information during the meeting
- ask questions and listen to responses to clarify understanding
- select the appropriate form, channel and mode of communication for the meeting
- cooperate with others as part of familiar activities, playing an active role in facilitating group interaction
- reach a consensus amongst the team on three activities to run.

Step 3

Notify attendees of the outcome.

- Use the Email Template to write an informal email to the meeting attendees that briefly details what happened at your meeting. Make sure you list each date of your social activity and what your team will do. Proofread your email and make sure it is free of errors and accurately reflects your discussions and outcomes, ensuring that you:
  - specify who the email is to
  - specify the date and time you sent the email
  - specify the subject.
- Report the outcome of the meeting and detail the social activities that will be taking place, including the dates, location, and cost per person.

To:	[enter text]
From:	Glenda Williams (glenda.williams@cbsa.com.au)
Date/time:	[enter text]
Subject:	[enter text]
Attachment:	[enter title of attachment or delete]

To [enter text],

The email must specify:

- the email be delivered to their two team members (Ian Banks and Zane O'Brien)
- the date and time that they sent the email
- a relevant subject (for example, social calendar, social activities, team meeting or similar)
- students must complete the email's message body, including listing each date of the three social activities and what the team will do for each. This must accurately reflect the discussion at the meeting. The dates of the activities will be documented for the next three Fridays from the day of the meeting. The cost per person must be under $30. The locations must be in the local area

Kind regards,

Glenda Williams

Human Resources Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

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Assessor Instructions for Assessment Part B

Purpose of the Task

This part is designed to ensure that the student can meet informally with several people and gain agreement on the outcomes of that meeting.

Reassessment Arrangements

If the student does not demonstrate the skills and knowledge required for this task, you must discuss the areas for further development with the student and arrange a time for reassessment. This may involve rerunning the informal meeting or the student revising their written documentation. Provide the student guidance on what needs to be reassessed and how.

Guidance to Assessors About This Part

The student will continue in the role of Glenda Williams, the HR Manager. Glenda's team consists of Ian Banks (Contract Specialist) and Zane O'Brien (HR Consultant).

The meeting can occur at a time and location of the student's choosing.

The student must bring the two activities they found while researching to this meeting. These ideas should meet Gavin's guidelines: under $30 per person and within the local area.

If the student has difficulty assembling peers or classmates, provide assistance.

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To provide an opportunity for students to promote participation, discussion, problem-solving and resolution and participate in verbal exchanges using appropriate style, tone and vocabulary for the audience, the following role-play descriptions are available. Please provide to students and role-play participants before they begin:

- **Zane** likes the idea of the social calendar; he loves going out and having a good time. He has several ideas, some great, some not so great. Quite a few ideas should be beyond the budgeted amount and outside the local area. Some of the ideas may also not be ones others would welcome as they may be interest-specific. Zane should be enthusiastic and not take any offence or concern when the student has to refuse some of his ideas. One idea must be to go out for dinner, but it must be a particular cuisine. Zane and Ian get along well but have different interests. Zane can find Ian frustrating but can approach him respectfully. Zane should try to talk Ian around to the idea of the social calendar.

  Zane is also easily distracted by his phone, which he should have in his pocket.

- **Ian** isn't overly keen on the idea of the social calendar. He will find ways to veto Zane's ideas (e.g., he doesn't like a specific type of cuisine if Zane mentions going for dinner, doesn't like sports or live bands, etc.). He will soften to the idea of the social calendar and admit that he likes one of the ideas presented by the student. Ian should come up with one idea that would be suitable and within the budget (for example, trivia night at a local pub, helping out with a charity, etc.). Ian should come across as being quiet and reserved in nature, the opposite of Zane.

  Ian will roll his eyes when he sees Zane checking his phone.

Assessment checklist:

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

		Y	N
1	Chairing an informal meeting	☐	☐
2	Emailing participants of meeting outcomes (BSBTWK503_03_Outcomes_Student name)	☐	☐

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Part B: Assessment Marking Criteria
Guidance to Assessors

Use the following checklist to ensure that the student successfully led the informal meeting.

	During the demonstration of skills, the student has satisfactorily (S) or unsatisfactorily (U) facilitated a discussion and debate on ideas with team members and:	S	NYS
1	Conducted/chaired/managed an informal meeting. Look for: • Welcomed Ian and Zane and explained the purpose of the meeting. • Started the meeting by presenting their activities and asking for feedback/thoughts. • Kept the meeting on track and made efficient use of time (especially considering there was no formal agenda). • Achieved consensus amongst the team.	☐	☐
2	The student promoted participation, discussion, problem-solving and resolution of issues. Look for: • Cooperated with others as part of everyday activities. • Actively facilitated group interaction. • Treated team members with respect. • Listened to ideas and encouraged new ones. • Showed interest in activities that are being mentioned. • Was respectful and sensitive when dealing with activities over budget, not appropriate or not local. • Considered the others' personalities and how they interact. • Kept an eye on behaviour that could lead to conflict or issues. • Role modelled professional behaviour. • Actively drove discussion, discouraging distraction, defused potential for conflict or other issues, encouraged participation etc.	☐	☐
3	The student used appropriate style, tone and vocabulary for the meeting Look for: • Used appropriate style, tone and vocabulary for the audience, context and purpose. • Ensured communication remained polite and respectful, even though the meeting was informal • Used a respectful and calm approach when dealing with clashes and problems within the group. • Showed enthusiasm and interest when ideas were raised. • Respectfully and politely addressed ideas that weren't appropriate or relevant.	☐	☐

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During the demonstration of skills, the student has satisfactorily (S) or unsatisfactorily (U) facilitated a discussion and debate on ideas with team members and:

		S	NYS
4	The student listened for specific information during meetings. Look for: • listening for information and identifying other ideas from it, etc. • Listened for ideas with promise and activities where the student can infer these will be over budget or not in the local area. • Listened to the undertones of conversation between attendees.	☐	☐

5	The student asked questions to clarify understanding.
	Look for:
	• Questioned Ian and Zane about the costs of the activities or where the activities are
	• Used questioning to determine who is on board with an activity
	• Used active questioning:
	   o open questions to draw more information and engage the pair
	   o closed questions to eliminate an activity or move forward.
	• Encouraged team to answer questions honestly and openly.
		☐	☐

6	Reported the meeting outcomes and detailed the social activities that will be taking place, including the dates, location and the cost per person.
	
	Look for:
	• Followed CBSA procedures by using the CBSA Email Template
	• Specified who the email is to (two team members Ian Banks and Zane O'Brien, and copies Gavin Stead in)
	• Specified who the email is from (Glenda Williams)
	• Specified the date and time it was sent.
	• Provided a relevant subject (e.g., social calendar, social activities, team meeting or similar)
	• Body of message included:
	   o listing each date of the three social activities and what the team will be doing for each
	   o accurately reflects the discussion at the meeting
	   o the dates of the activities (the next three Fridays from the day of the meeting)
	   o the cost per person must be under \$30
	   o the locations must be in the local area
	• Email is free of errors and accurately reflects discussions and outcomes.
		☐	☐

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Assessment checklist:

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

Part A: Prepare for an Informal Meeting		
1	Developing a meeting agenda **(BSBTWK503_03_Agenda_Student name)**	☐
2	Preparing an Email to distribute the agenda to meeting participants **(BSBTWK503_03_Agenda email_Student name)**.	☐
Part B: Chair an Informal Meeting		
1	Chairing an informal meeting	☐
2	Emailing participants of meeting outcomes **(BSBTWK503_03_Outcomes_Student name)**.	☐

Congratulations, you have reached the end of Assessment 3!