



BSBPEF501

ASSESSOR GUIDE

Manage personal and professional development

Assessment 2 of 2

Project

Assessment Instructions

Task overview

This assessment task is divided into 3 parts:

- Part A: Manage team goals and planning
- Part B: Personal and professional development
- Part C: Manage team health and wellbeing

Read each question carefully before capturing your responses as indicated.

Additional resources and supporting documents

To complete this assessment, you will need to access and apply the following documents:

- CBSA Business Plan
- CBSA Project Governance Plan
- CBSA Personal and Professional Development (PPD) Policy and Procedure
- PPD Form_Frankie
- PPD Form_Joey
- PPD Form template
- CBSA Health and Wellbeing (H&W) Policy and Procedure



Assessment Information

Submission

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

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

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



Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

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



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

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



Please consider the environment before printing this assessment.

For this assessment, you will be performing in the role of a Project Manager working at Complete Business Solutions Australia (CBSA), a business consulting firm. You are presented with scenarios where you will engage in activities to plan activities and manage personal and professional development for yourself and your team.

The scenarios and instructions below aim to provide you with the opportunity to demonstrate the appropriate skills and knowledge needed to develop and lead your team and apply personal and professional development opportunities for yourself and others within your team.

Part A: Manage team goals and planning



To: You [...@cbsa.com.au]
From: Gavin Stead (gavin.stead@cbsa.com.au)
Date/time: Monday 11:11 a.m.
Subject: Role responsibilities and tasks
Attachment: CBSA Business Plan.pdf
Project Governance Plan.docx

Good morning,

Due to recent business expansion, we are creating a new consulting team for a specific project focused on delivering business services to a new client. I have completed the introduction and key deliverables of the project in the Project Governance Plan document attached to give you an idea of the project scope.

There are a couple of elements of this document that I have not completed that you will need to update. These include:

- Identifying team member responsibilities (section 4)
- Demand prioritisation for corporate, yourself and your team (section 5)
- The CBSA goal-setting framework (section 6)
- Implementation planning instructions (section 6)

Once you have updated the project governance document, please circulate this to your team to provide them with a project overview and to be used to help them document their work goals, plans and activities for this project.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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ATTACHMENTS

- CBSA Business Plan
- Project Governance Plan

Task 1: Team member responsibilities

Review Gavin's email and the attached documents, which can be downloaded from the LMS. Consider the position requirements for a project team member and update **Section 4: Project team member's responsibilities** in the **Project Governance Plan** document. You must identify five key responsibilities of a project team member.

Capture your answer in the space provided within the **Project Governance Plan** document. Save this as yymmdd_yourname_BSBPEF501_02_PART1. You will add more information across Part A, after which you will finalise and submit this document for assessment.

(Approximate word count: 20-50 words in total)

Assessor Instructions

Students must capture five (5) key responsibilities of a generic project team member. These answers will be captured in Section 4 of the Project Governance Plan document.

A sample answer is provided below. Student's answers may vary but must reflect responsibilities that align with project delivery or client delivery against set objectives/goals.

RESPONSIBILITIES	
1.	Contributing to overall project objectives
2.	Completing individual deliverables
3.	Providing expertise
4.	Working with clients to establish and meet business needs
5.	Documenting the process

Task 2: Priority planning

Based on the tasks and demands outlined in **Section 5: Initial planning** of the **Project Governance Plan** document, identify the order each activity needs to be completed based on their priority for the organisation, manager and team members.

Capture your answer in the space provided within the **Project Governance Plan** document. Save this as yymmdd_yourname_BSBPEF501_02_PART1. You will add more information across Part A, after which you will finalise and submit this document for assessment.

Assessor Instructions

Students must identify the priority order for the tasks to be completed for the organisation, manager and team member as outlined.

These answers will be captured in Section 5 of the Project Governance Plan document.

A sample answer is provided below. Student's answers must reflect the priority order as set out below.

TASK/ DEMANDS	PRIORITY
ORGANISATION	
Activate and file contract (Governance)	4
Confirm billing/costing in line with CBSA Business Plan (Governance)	1
Coordinate contract signing (Governance)	3
Finalise contract for project – ready for signing (Legal)	2
MANAGER	
Facilitate PPD opportunities for team members	4
Engage project team and support them in identifying their work goals, plans and activities	2
Commence project delivery	5
Identify Personal and Professional Development (PPD) gaps for team members	3
Identify project team – roles and responsibilities	1
TEAM MEMBERS	
Seek feedback from Manager to ensure work goals, plans and activities are appropriate	2
Develop work goals, plans and activities in line with responsibilities	1
Commence work in line with project deliverables	4
Identify Personal and Professional Development (PPD) gaps for self in line with responsibilities	3

Task 3: Team member planning

In line with **Section 6: Implementation planning** in the **Project Governance Plan** document, identify a five-step organisational framework for setting work goals and develop clear instructions to support team members to set work goals, create a plan and develop activities. Make sure your instructions outline the SMART goal-setting criteria captured in this framework.

Capture your answer in the space provided within the **Project Governance Plan** document. Save this as `yymmdd_yourname_BSBPEF501_02_PAT1.pdf`. You will add more information across Part A, after which you will finalise and submit this PDF document for assessment.

(Approximate word count: 20-50 words in total)

Assessor Instructions

Students must provide a five-step goal-setting framework to be applied to the planning process for team members. Instructions on how to apply this to develop work goals, plans and activities also need to be captured.

These answers will be captured in Section 6 of the Project Governance Plan document.

Sample answers are provided below. Students' answers may vary but must clearly reflect the five-step goal-setting framework identified. Instructions must capture the tasks to be completed to develop each of the plan elements in line with the goal-setting framework. Step 2 of the work goal element must identify the SMART goal-setting criteria as reflected.

GOAL SETTING FRAMEWORK (Word range: Up to 10 words each)		PLAN ELEMENT	INSTRUCTIONS (Word range: 25-55 words each)
1.	Determine the outcome you want to see	Work goal	Review the client's introduction and key deliverables to identify what it is they need to achieve. Consider this in relation to your role and responsibilities for delivery.
2.	Apply the SMART goal-setting criteria		Clarify this goal by applying the SMART criteria. This is: Specific – be precise about what this looks like Measurable – make sure it can be monitored and measured. Achievable – make sure it can be achieved. Realistic – make sure it is realistic within the resources and constraints. Time-focused – capture timeframes for the completion of the goal.
3.	Create an action plan	Plan	The action plan breaks the goal down into smaller milestones in order to group and prioritise the achievement of key elements. It needs to capture the milestones and key deliverables in line with resource and time considerations.

4.	Take action	Activities	<p>A list of activities required to achieve each of the milestones in the action plan needs to be captured. These activities are specific tasks and actions allocated to individual resources with allocated timeframes.</p> <p>These need to be completed and reported on so that delivery of the action plan can be monitored.</p>
5.	Assess your success	Post implementation review	<p>Key measurables as set in the goal setting stage need to be monitored and reported back to determine the success of the overall project in achieving its goals.</p> <p>Depending on the project this type of review may occur before the project is delivered on completion and/or at scheduled points after delivery.</p>

Task 4: Assess and provide feedback to Frankie

Frankie is the NGP Project Administrator. This role involves assisting with project management and ensuring the project's daily functions run smoothly. The duties of a project administrator include:


- Task tracking – track tasks to make sure deadlines are met
- Process documentation – write and organise project documentation
- Resource management – ensure the project stays within budget
- Meeting administration – schedule and take meeting notes

In line with the goal-setting framework in the **Project Governance Plan** document, review the proposed work goals, plans and activities proposed by Frankie (below), then provide feedback and support to guide Frankie on the development of effective work goals specific to the role of Project Administrator. Include the following in your reply:

- Assess the goals sent by Frankie for alignment with the organisational goals
- Clarify the key organisational goal for the NGP project
- Outline the role of the Project Administrator
- Articulate the roles' key responsibilities
- Provide guidance (with reference to appropriate CBSA documentation) on setting tailored work goals.

Submit your feedback and support in an email using the template provided below.

(Approximate word count: 350-400 words)

	To:	You [...@cbsa.com.au]
	From:	Frankie (Frankie@cbsa.com.au)
	Date/time:	Thursday 9:15 a.m.
	Subject:	Work goals, plans and activities
	Attachment:	N/A

Hi,

Thanks for circulating the Project Governance Plan document and instructions on setting work goals, plans and activities.

As the project administration support, my role is very simple. Please find attached my planned activities, as requested.

- Schedule and coordinate regular project meetings.
- Create and circulate meeting minutes.
- Administrative tasks for project team members as needed.

Please let me know if this is what you need.

Kind Regards,

Frankie



CBSA Business Consultant - Administration

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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

Assessor Instructions

Students must capture feedback and support on the development of work goals for Frankie, the Project Administrator. This is to be captured as a reply email to Frankie. The following information must be captured in the email:

- Feedback on the work goals sent through that identifies it as incomplete/not detailed enough, not aligned to the organisational goals, or delivering on the core components of the role.
- Clarification of the key organisational goals to be supported - support clients and profitability
- Clarification of the role - Project Administrator
- Clarification of the roles key responsibilities - task tracking, process documentation, resource management and meeting administration
- Guidance on how to set tailored work goals – the five-step process.
- Reference to additional resources to support work goal development, including the CBSA Project Governance Plan and possibly the CBSA Business Plan.
- An example of how to apply this to their role should be included.

A sample answer is provided below. Students' answers may vary but must include feedback and support in developing work goals as outlined above.

		Email Template
To:	Frankie (Frankie@cbsa.com.au)	
From:	<<Add your name and position title here>>	
CC:		
Date/time:	Thursday 10:30am	
Subject:	Work goals, plans and activities - Feedback	
Attachments:	Project Governance Plan.docx	
<p>To Frankie,</p> <p>Thank you for your email.</p> <p>In setting your goals, plans and activities, you must ensure these align to supporting the organisation's goals, your role and responsibilities. This includes the following:</p> <ul style="list-style-type: none"> • Organisational goals <ul style="list-style-type: none"> ○ Support our clients ○ Achieve delivery of the project within the profit ratio set out in the CBSA Business Plan • Role <ul style="list-style-type: none"> ○ Project Administration • Responsibilities <ul style="list-style-type: none"> ○ Task tracking – track tasks to make sure deadlines are met ○ Process documentation – write and organise project documentation ○ Resource management – ensure the project stays within budget ○ Meeting administration – schedule and take meeting notes 		

I can see some of the basic elements of your role captured in the activities you suggested; however, you need to work through the five steps outlined in [Section 6: Implementation planning](#) of the **Project Governance Plan** document (see attached) for implementation planning/goal setting framework.

These include:

- Determining what you want to see
- Applying the SMART goal-setting criteria
- Create an action plan
- Take action
- Assess your success

So, if you look at these steps with the CBSA goals, your role and your responsibilities in mind, you should be able to set more meaningful work goals.

An example of this for your position, if we look at the responsibility of task tracking, may include the following:

- **Determining what you want to see** – Clear tasks, prioritised, assigned and tracked on a scheduled basis in line with time and budget (to meet profit ratio) requirements.
- **Applying the SMART goal-setting criteria** – **Manage tasks in an online system that can be time and resources assigned and tracked with key milestones reported** to the Project Manager weekly. This goal is specific, measurable, achievable, realistic and time driven.
- **Create an action plan** – Identify key milestones and capture them. **Work** with team members to identify and capture smaller tasks to be assigned.
- **Take action** – Create the tasks in the CBSA tracking system and assign as agreed.
- **Assess your success** – Review key milestone reporting to determine project tracking/overall success.

Apply the above process/steps to your other key responsibilities to determine your key work tasks, plans and activities. If you have any questions or concerns when completing this task, please reach out for further support.

Kind regards

<<Add your name here>>



<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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

Task 5: Assess and provide feedback to Joe

Joey is the NGP Project Human Resources (HR) Consultant. This role involves assisting with the HR elements of the project plan deliverables. The duties of a project HR consultant include:


- Develop a workforce plan
- Creating client position descriptions
- Recruitment of resources in line with the workforce plan
- Onboarding of new recruits including contract generation and payroll integration

In line with the goal setting framework in the **Project Governance Plan** document, review the proposed work goals, plans and activities proposed by Joey (below), then provide feedback and support to guide Joey on the development of effective work goals specific to the role of Project HR Consultant. Include the following in your reply:

- Assess the goals sent by Joey for alignment to the organisational goals
- Clarify the key organisational goal for the NGP project
- Outline the role of Project HR Consultant
- Articulate the roles key responsibilities
- Provide guidance (with reference to appropriate CBSA documentation) on setting tailored work goals.

Submit your feedback and support in an email using the template provided below.

(Approximate word count: 350-400 words)

	To:	You [...@cbsa.com.au]
	From:	Joey (Joey@cbsa.com.au)
	Date/time:	Thursday 9:53 a.m.
	Subject:	Work goals, plans and activities
	Attachment:	N/A

Hi,

I am pulling together some work goals, plans and activities for my role in this project as requested, but I am not sure I am on the right track so thought I would try one and ask for confirmation.

For developing a workforce plan I have:

- Meet with client.
- Confirm functions needed.
- Identify roles needed.
- Tabulate total workforce requirements.

Please provide feedback on the above before I complete the rest of my work goals.

Kind Regards,

Joey



CBSA Business Consultant – Human Resources

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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

Assessor Instructions

Students must capture feedback and support on the development of work goals for Joey, the Project HR Consultant. This is to be captured as a reply email to Joey. The following information must be captured in the email:


- Feedback on the work goals sent through that identifies it as incomplete/not detailed enough (no timelines or measures etc.).
- Clarification of the key organisational goals to be supported - support clients and profitability
- Clarification of the role - Project HR Consultant
- Clarification of the roles key responsibilities – developing a workforce plan, creating PDs, recruitment of resources, onboarding including contracts and payroll integration.
- Guidance on how to set tailored work goals – the five-step process.
- Reference to additional resources to support work goal development including the CBSA Project Governance Plan and possibly the CBSA Business Plan.
- An example on how to apply this to their role should be included.

A sample answer is provided above (Part A Task 5) based on the Project Administrator role. Students must include feedback and support in developing work goals as outlined above to align to this individual/role.

Task 6: Manage team priorities using technology

Using [Monday.com](https://monday.com), create an account and task board based on the activities outlined in Frankie and Joey's plans above. Use the following instructions to complete this task.

Instructions:

1. Go to [Monday.com](https://monday.com)
2. Select "Create a new account" (unless you already have one you can use)
3. Select "Work" as your reason for logging in
4. Select "2-5" people on your team and select "20-49" people at your company
5. Select "Operations" to manage first
6. Select "Project Management" to focus on first
7. Select "Remind me later" on the page to invite your teammates to build your workflows together
8. Name your board "BSBPEF501"
9. Select "Tasks" as one of the items you would like to manage
10. List three tasks to add to the board based on three of Joey's tasks in Part A Task 5. E.g.
11. Create two groups (e.g. milestone, time frame, subject, specialty area) to better organise tasks. E.g.
12. Watch the Monday.com tutorial to learn and get inspired by the options and functionality of the tool.
13. Update your tasks as follows:
 - a. Create at least one more task based on Frankie's tasks in Part A Task 4
 - b. Ensure tasks are in the correct *group*
 - c. Assign Joey and Frankie's tasks on the board. Use your login as one of these roles and add at least one other person to assign the other roles tasks to as follows:
 - i. Use the *Invite members*  icon on the left navigation bar
OR
 - ii. Click on the + sign in the *Person* column of your board
NOTE: You will need to assign this to an email address. It is recommended you use a **second personal email address or use a friend's email address for this. No action is required by this login – it is just so you can set up a second person to allocate tasks to.**
 - d. Update the status for each task
 - i. Update the first task as *Working on it*
 - ii. Create a new label using the status drop-down and selecting "Edit Labels". Update the grey label to *Not yet started* and assign this to the remaining tasks.
14. Update the due date for each task by entering a date every two days – e.g. The first task will be due in 2 days, the second task will be due in 4 days, the third task will be due in 6 days, etc.

Take a screenshot or snipping of your task board once created and paste it in the space provided below. Make sure you capture all elements of your browser to show the board name, both groups and all four assigned and dated tasks.

Assessor Instructions

Students must complete the steps above to create a board that reflects the unit code (BSBPEF501) as the board name, a minimum of 4 tasks based on the roles of Joey and Frankie as captured in Part A Tasks 4 and 5, in two groups (these may be milestone, time, subject or specialty focused), assigned and dated as appropriate.

A sample answer is provided below.

<<Insert screenshot here>>

Workspace

Main workspace

+ Add

Filters

Search

BSBPEF501

VR

VR

BSBPEF501

Please confirm your email address: veronica.ritchie@edify.com.au [Resend email](#)

Workflows center Activity 10/1 Invite / 5

BSBPEF501

Add your board's description here [See More](#)

Main Table

New Task Search Person Filter Sort Hide

Planning

Task	Person	Status	Date	
Develop a workforce plan		Working on it	Dec 24	
Create position descriptions		Not yet started	Dec 26	
Create task tracking system	VR	Done	Dec 23	
+ Add Task				

Implementation

Task	Person	Status	Date	
Recruit workforce		Not yet started	Dec 31	
+ Add Task				

Part B: Personal and professional development



To: You [...@cbsa.com.au]
From: Glenda Williams (glenda.williams@cbsa.com.au)
Date/time: Thursday 12:34 p.m.
Subject: Team PPD
Personal and Professional Development Policy and Procedure
Attachment: PPD Form Template
PPD Form_Frankie
PPD Form_Joey

Good afternoon,

Following on from Gavin's request to build out and implement a Personal and Professional Development (PPD) policy and procedure, I have drafted the attached policy and would like you to use it to document PPD opportunities for yourself and facilitate access to PPD opportunities for your team.

To support this process, I have attached the following:

- The Personal and Professional Development Policy and Procedure document: For information and procedures relating to this program.
- A PPD Form for Frankie and Joey So you can support them in conducting their own development opportunities.
- A PPD Form Template: This is for you to complete your own PPD.

When completing your own PPD, consider the feedback received in your last project deliveries post-implementation review. Key highlights from this process included:

- **Project outcomes:**
 - o **Overall:** The overall project outcomes were met which is impressive due to the scope of the project and the resources available.
 - o **Timeline:** There were some minor delays in some milestones early on; however, the timeline was adjusted so that this time could be recouped throughout the project.
 - o **Budget:** While the budget was met, there was also a delay in confirming this due to the invoice submission process followed (each team member submitting their own costs/invoices with some going astray).
- **Team engagement:** Overall, team members felt engaged in the process, with sound communication a key factor in this. Due to some of the project delivery timelines, however, they felt significant stress that impacted their health and well-being. This was evidenced through increased absences linked to long hours, poor sleep, reduced exercise and poor diet.
- **Customer satisfaction:** The client was satisfied with the delivery of the project and communication throughout. They received a clear and logical handover and have reportedly been able to take this function forward with their own team successfully. The Managing

Director was particularly impressed and is undergoing a review of other programs and opportunities in their business that they may be able to engage us to implement or enhance.

Once you have completed your own PPD Template, we can meet to discuss your PPD plan and look to implement this where possible.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



ATTACHMENTS

- Personal and Professional Development Policy and Procedure
- Personal and Professional Development Form
 - BSBPEF501_02_PPD Form Template.docx
 - BSBPEF501_02_PPD Form_Frankie.docx
 - BSBPEF501_02_PPD Form_Joey.docx

Task 1: Team member's personal and professional development

Review Glenda's email and the Personal and Professional Development Policy and Procedure attached. Based on the project goals, plans and activities and individual team member role requirements, review the Personal and Professional Development Forms for Frankie and Joey and complete the following:

- Provide comments/ feedback related to the individual's assessment and development opportunity recommendation. For at least one of the team members, this must include identification of an additional development opportunity for future inclusion.
- Facilitate access to the proposed development opportunities for each through completion of the Approval section of the form.

Capture your answer in the Approval section of the individual PPD forms for Frankie and Joey as provided. Once complete, save these as "*yymmdd_yourname_BSBPEF501_02_PBT1_Frankie.pdf*" and "*yymmdd_yourname_BSBPEF501_02_PBT1_Joey.pdf*" and submit as PDF documents for assessment.

(Comment word range: 50-90 words)

Assessor Instructions

Students must complete the Approval component of Joey and Frankie's PPD forms and submit them for assessment as follows.

Students must provide commentary and/ or feedback on Frankie and Joey's PPD recommendations, capturing notes on at least one additional development opportunity for one team member for future consideration/ skill expansion.

To facilitate access to the proposed personal and professional development opportunities, the student must complete the entire approval section of the form.

A sample answer is provided below. The fields should be completed as captured below, with the **comment's** variable. Comments may include those captured but can be anything as long as they acknowledge the opportunities and, in at least one case for one team member make further/ future development recommendations.

Approval - Frankie

Manager name	<<Student name>>
Manager title	Project Manager
Manager comments Outline any additional comments and/ or suggestions relating to the opportunities/ implementation plan above. (Word range: 50-90 words)	I feel a stronger understanding of the finance process is a worthwhile development opportunity. Excel is a great skill to utilise both at work and outside of work. I feel this is a great skill for further development. Once you have developed your excel skills, it is worth considering completion of training using Access or Power BI for even better data management and utilisation.
Manager Signature	<< <i>Student name</i> >>
Date Approved	1/1/xx

Approval - Joey

Manager name	<<Student name>>
Manager title	Project Manager
Manager comments Outline any additional comments and/ or suggestions relating to the opportunities/ implementation plan above. (Word range: 50-90 words)	Development through access to industry consultation is a highly valuable resource. I believe that networking in this context is worthwhile. Once you have built some networks, I would recommend looking into the seminars on offer through this organisation to see if there are any more formal opportunities worth pursuing. Presentation skills are useful in all roles and while I feel Toastmasters is a large undertaking, it will certainly support the gap you have identified.
Manager Signature	<< <i>Student name</i> >>
Date Approved	1/1/xx

Task 2: Own personal and professional development

Review Glenda's email and the Personal and Professional Development Policy and Procedure attached. Based on your last project post-implementation review complete your own Personal and Professional Development plan using the PPD Form Template provided.

NOTE: Once completed, you will use this PPD to complete Part B Task 3.

Include the following in your form:

- Your employee details, reflecting your role as Project Manager and your reporting manager as Glenda for this process. Use the date you complete the form for the Date field.
- Identify two goals based on your post-implementation feedback for self-assessment. Reflect on the feedback provided on your strengths and weaknesses as required. Include one personal and one professional goal in your self-assessment. Your personal goal can reflect a skill needed to support your role (in line with the information provided), however it can have a second, personal application benefit. You may create your own personal application component.
- Create a development plan capturing two development opportunities to address the team engagement gaps and one other gap based on the feedback provided. These opportunities must relate to the goals (one personal and one professional) as outlined above. The development plan must include the following information:
 - Identify the *Area for development* – skill or knowledge
 - The *Development opportunity* – how you plan to address the development area
 - A step-by-step *Plan to implement* the development opportunity outlined, including how and when each step will be achieved.

NOTE: The *Date* will stay blank until the development opportunity is completed.

NOTE: At least one of the goals and development opportunities must address the Team engagement area with a focus on identifying and implementing techniques to manage team health and well-being. This will be used to support the completion of Part C, Tasks 1 and 2.

Capture your answer in the PPD Form Template. Save this as `yymmdd_yourname_BSBPEF501_02_PBT2` You will add more information for Part C Task 2 below, after which you will finalise and submit this document for assessment.

(Word counts are included in the template where appropriate.)

Assessor Instructions

Students must complete a PPD Form Template and submit it for assessment as follows.

Students must complete the following sections of the PPD Form for themselves based on the information provided by Glenda as follows:

- Employee details: Capturing their own name, title as Project Manager, manager as Glenda Williams and date as the day they completed the form.
- Self-assessment: Conduct a self-assessment based on two goals from the information on the previous projects post-implementation review as provided by Glenda. You must address one personal and one professional goal. The personal goal must support a skill development that will benefit your role with the personal component to be fabricated by the student. NOTE: One of the goals must relate to the Team engagement information. The information from Glenda includes the following:

- **“Project outcomes:**
 - **Overall:** The overall project outcomes were met, which is impressive due to the scope of the project and the resources available.
 - **Timeline:** There were some minor delays in some milestones early on; however, the timeline was adjusted so that this time could be recouped throughout the project.
 - **Budget:** While the budget was met, there was also a delay in confirming this due to the invoice submission process followed (each team member submitting their own costs/invoices with some going astray).
- **Team engagement:** Overall, team members felt engaged in the process, with sound communication a key factor in this. Due to some of the project delivery timelines, however, they felt significant stress that impacted their health and well-being. This was evidenced through increased absences linked to long hours, poor sleep, reduced exercise and poor diet. (THIS MUST BE INCLUDED AS A GOAL)
- **Customer satisfaction:** The client was satisfied with the delivery of the project and communication throughout. They received a clear and logical handover and have reportedly been able to take this function forward with their own team successfully. The Managing Director was particularly impressed and is undergoing a review of other programs and opportunities in their business that they may be able to engage us to implement or enhance.”
- **Development plan:** Students must identify two development opportunities to address the team engagement gaps and one other gap based on the feedback above. These opportunities need to address a gap from the information provided by Glenda and relate to a personal skill and a professional one.

Students have captured this answer in the PPD Form Template, renamed it as yymmdd_yourname_BSBPEF501_02_PBT2.pdf, and submitted it for assessment. This document reflects the answers for this task (see “Employee details”, “Self-assessment” and “Development Plan” section) and Part C Task 2.

A sample answer is provided below. Answers may vary, but they must address the requirements as set out above.

Employee details

Name	<<Student name>>
Position	Project Manager
Reporting manager	Glenda Williams
Date	1/1/xx

Self-assessment

Goal 1 What is your key objective, plan, activity? (Word count: Up to 20 words)	Development of health and wellbeing initiatives to support own personal health and wellbeing as well as team engagement.
Strengths What was done well? (Word count: Up to 30 words)	Overall team members felt engaged in the process with sound communication a key factor in this.

<p>Weaknesses</p> <p>What can be done better? (Capture any skill and/ or knowledge gaps for development to achieve this goal.) (Word count: Up to 50 words)</p>	<p>Due to some of the project delivery timelines employees had periods where they felt stress, impacting their health and wellbeing. This was evidenced through increased absences linked to long hours, poor sleep, reduced exercise and poor diet.</p>
<p>Goal 1</p> <p>What is your key objective, plan, activity? (Word count: Up to 20 words)</p>	<p>Time management</p>
<p>Strengths</p> <p>What was done well? (Word count: Up to 30 words)</p>	<p>The project was achieved within the timeline set and agreed with the client.</p>
<p>Weaknesses</p> <p>What can be done better? (Capture any skill and/ or knowledge gaps for development to achieve this goal.) (Word count: Up to 50 words)</p>	<p>Early timeline development created delays in delivery against some key milestones. Some adjustments were made to deliverables to recoup this time. However, this impacted future tasks and created stress in the workplace.</p>

Development plan

<p>Area for development</p> <p>(Word count: Up to 10 words each)</p>	<p>Development opportunity</p> <p>(Word count: 10-30 words each)</p>	<p>Plan to implement</p> <p>(How and when will this be achieved?)</p> <p>(Word count: 60-110 words each)</p>	<p>Date completed</p>
<p>Health and wellbeing initiatives</p>	<p>Identify and implement techniques to support health and well-being. These can be applied to myself and the team/ workplace.</p>	<ul style="list-style-type: none"> • Conduct research into health and well-being initiatives – over a two-week period • Develop recommendations of health and well-being initiatives to apply to the team/ workplace – at the end of a two-week period • Gain management approval to implement – two days after the recommendation • Implement/ deliver health and well-being techniques to the team – over a two-month period • Monitor the program to determine the impact of health and wellbeing initiatives against employee engagement – at one-month post-delivery, six months post-delivery and at the end of each project 	

		<ul style="list-style-type: none"> • Complete reflection to identify the impact of initiatives on myself – at one month post-delivery, six months post-delivery and at the end of each project 	
Time management skills	<p>Attend a time management course to build time management skills.</p> <p>Time management course: Essentials – One day face-to-face or Zoom/online training session \$590-\$620.</p>	<ul style="list-style-type: none"> • Confirm approval of course attendance (time and cost) – next 2 days • Enroll in course – within a week of approval • Attend enrolled session – as scheduled • Complete reflection to identify key skills developed – within a week of completing the course • Apply to current and future project scope and delivery processes – immediately post post-course completion • Monitor to determine the impact on project delivery against minor and major milestones - at one-month post-delivery, six months post-delivery and at the end of each project 	

Task 3: Seek feedback on development needs – ROLE PLAY

Using your completed PPD Form from Part B Task 2 above, you need to meet with your manager (Glenda) to discuss your proposed personal and professional development recommendations and request feedback on your development needs.

For this session, you are to conduct a meeting with a participant playing the role of Glenda (or Glen if appropriate). This session must go for a maximum of 5 minutes.

During this session, you are required to:

- a. Discuss your self-assessment and proposed gaps and development opportunities as captured in your PPD form.
- b. Demonstrate active listening and questioning to seek and receive feedback from Glenda on your development needs as identified.
- c. Discuss measures of personal work performance to be achieved.

The participant (Glenda) must provide feedback on the development needs identified. This must include reference to:

- Positive outcomes against the delivery of the previous project as outlined in the overall results and strong customer satisfaction input.
- Overall approval of the PPD Form recommendations as captured.
- A need to look at improving employee engagement in a way that supports team members physically and emotionally as a priority.
- A request that the student complete a development task whereby they identify techniques to manage team health and well-being for implementation. If this is already captured in the PPD Form, then support this development as a priority. NOTE: This task will be completed as Part C Task 1 below.
- Set competency standards for achievement of the implementation of the health and wellbeing task as set out. This would be a reduction in staff absence and an increase in staff satisfaction in the annual employee engagement survey.

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

- Use of appropriate language and nonverbal cues to seek and receive feedback.
- Use of listening and questioning skills to clarify or confirm understanding.

Role play instructions

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

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

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

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

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

Participant role outline

Glenda Williams (HR Manager)

(NOTE: You may address the HR Manager as Glen or Glenda Williams as preferred by your participant.)

- Manager level positions
- Must provide feedback and recommendations
- Must reference the following through the meeting:
 - Positive outcomes against the delivery of the previous project as outlined in the overall results and strong customer satisfaction input.
 - Overall approval of the PPD Form recommendations as captured.
 - A need to look at improving employee engagement in a way that supports team members physically and emotionally as a priority.
- Must also:
 - Request the student complete a development task whereby they identify techniques to manage team health and wellbeing for implementation. If this is already capture in the PPD Form, then support this development as a priority.
 - Set a competency standard for achievement of the implementation of the health and wellbeing task as set out. This would be a reduction of staff absence and an increase in staff satisfaction in the annual employee engagement survey.

Option 1: Peer participant

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

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

Option 2: Fellow student participants

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

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

Recording instructions

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

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

Submission instructions:

- Save the recording and name the file using the following naming convention:
yymmdd_yourname_BSBPEF501_02_PBT3
- Submit the recording together with your assessment.

Observation Checklist: Emotional Intelligence Consultation		
The student being assessed must:	Satisfactory/ Not Yet Satisfactory	Assessor Comments
Discuss their self-assessment and development plan as set out in their PPD Form with the HR Manager.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Demonstrate active listening and questioning in order to seek and receive feedback on their development needs as identified.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Discuss measures of personal work performance to be achieved.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Gain approval of the overall PPD Form.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Agree priority development task of identifying and implementing techniques to manage health and wellbeing of the team.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Agree to the competency standards set for achievement of the priority development opportunity.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Use of appropriate language and nonverbal cues to seek and receive feedback.	S <input type="checkbox"/> NYS <input type="checkbox"/>	
Use of listening and questioning skills to clarify or confirm understanding.	S <input type="checkbox"/> NYS <input type="checkbox"/>	

Assessor Instructions

Students must record a meeting to review their PPD Form and gain feedback and approval from the HR Manager (Glen or Glenda Williams). During this session, students are required to:

- a. Discuss your self-assessment and proposed gaps and development opportunities as captured in your PPD form.
- b. Demonstrate active listening and questioning to seek and receive feedback from Glenda on your development needs as identified.
- c. Discuss measures of personal work performance to be achieved.

The participant (Glenda) must provide feedback on the development needs identified. This must include reference to:

- Positive outcomes against the delivery of the previous project as outlined in the overall results and strong customer satisfaction input.
- Overall approval of the PPD Form recommendations as captured.
- A need to look at improving employee engagement in a way that supports team members physically and emotionally as a priority.
- A request that the student complete a development task whereby they identify techniques to manage team health and wellbeing for implementation. If this is already captured in the PPD Form, then support this development as a priority.
- Set competency standards for achievement of the implementation of the health and wellbeing task as set out. This would be a reduction of staff absence and an increase in staff satisfaction in the annual employee engagement survey.

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

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

Part C: Manage team health and wellbeing



To: You [...@cbsa.com.au]
From: Glenda Williams (glenda.williams@cbsa.com.au)
Date/time: Monday 3:21 p.m.
Subject: Health and Wellbeing – PPD opportunity
Attachment: Health and Wellbeing Policy and Procedure

Hello,

Following on from our meeting last week and in line with your PPD, I think the identification and implementation of techniques to manage team health and wellbeing needs immediate attention.

To get this happening, can you please complete the following tasks:

- Research and identify two techniques to support team health and well-being.
- Develop a communication presenting this information to your project team to implement effectively immediately.
- Lead by example – include examples of how you also plan to apply these techniques for inclusion in your team communication.

When identifying your techniques, remember you need to measure your work performance based on the success of these initiatives as part of managing your team. This will be captured through a reduction in employee absences and staff satisfaction rating as captured in the employee engagement survey.

To kick this off, I have attached a copy of CBSA's Health and Wellbeing Policy and Procedure. This includes some high-level and relatively generic options. You can use this as a jumping point but will need to conduct further research on each option and how to apply it.

Once you have identified some techniques for implementation, choose two that you can communicate directly to your current project team about in order to get this implemented asap.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



ATTACHMENTS

- Health and Wellbeing Policy and Procedure

Task 1: Identify and implement health and well-being techniques

Review Glenda’s email and the Health and Wellbeing (H&W) Policy and Procedure attached. Based on this policy document and in line with Glenda’s feedback on your PPD, complete the following:

- Research and identify one technique/ program to support an individual’s health and one technique/ program to support an individual’s well-being to be applied to your current project team
- Present this information in a table to be circulated to your project team via email.
- Include an example of how you plan to implement the techniques outlined to support your personal health and well-being.
- Direct the team to consider and implement the techniques shared effective immediately.


Cover the following technique information in your communication:

- Technique – the name and a brief description of the technique/ program
- Process – how to apply the technique/ how the program works
- Potential benefits – positive impacts the technique/ program can create

The CBSA Health and Wellbeing Policy and Procedure must be referenced as attached in the “Attachments” and “Content” sections of the email as supporting documentation.

Capture this communication in the email template below. Detail the techniques in the tables provided within the content of the email template.

(Approximate word count: 100-140 words for the content of the email excluding the techniques table)

 <div style="text-align: right; margin-top: 20px;">Email Template</div>	
To:	<<Add audience here>>
From:	<<Add your name and position title here>>
CC:	<<Add names and position title of carbon copy email recipients here (leave blank if none)>>
Date/time:	<<Add the time and date of the email here>>
Subject:	<<Add the subject of the email here>>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>

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

<<Add message here>>

Technique/ Program for Health Name and a brief description. (Approximate word count: Up to 25 words)	
Process How to apply the technique. (Approximate word count: 40-60 words)	
Potential benefits How the technique will help support your health. (Approximate word count: 20-40 words)	

Technique/ Program for Wellbeing Name and a brief description. (Approximate word count: Up to 25 words)	
Process How to apply the technique. (Approximate word count: 40-60 words)	
Potential benefits How the technique will help support your wellbeing. (Approximate word count: 20-40 words)	

Kind regards

<<Add your name here>>



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

Assessor Instructions

Students must research and identify one technique to support health and one technique to support wellbeing for individuals within the workplace.

These techniques are to be presented to the project team for implementation via email. In the email students must also include an example of how they, as the Project Manager, would implement the techniques provided and direct the team to implement these techniques effective immediately.


Each technique/ program must include the following information:

- A name and brief description
- The process for applying it
- The potential benefits

This information must be captured in the tables provided within the email template.

The CBSA Health and Wellbeing Policy and Procedure must be **referenced as attached in the “Attachments” and “Content”** sections of the email as supporting documentation.

A sample answer is provided below. Answers may vary; however they must address the requirements as set out above.

	Email Template
To:	Project Team
From:	<<Student name>> - Project Manager
CC:	
Date/time:	Wednesday 4:09 p.m.
Subject:	Health and wellbeing
Attachments:	CBSA Health and Wellbeing Policy and Procedure
<p>Hi all,</p> <p>I understand that during the delivery of our last project, the team were under a fair amount of pressure.</p> <p>In line with the CBSA Health and Wellbeing Policy and Procedure, I have conducted research into health and wellbeing techniques and programs that we may apply to improve our overall health and wellbeing.</p> <p>As a start, I have identified the following opportunities that we can implement immediately to improve our environment and overall comfort.</p>	

Technique/ Program for Health Name and a brief description. (Approximate word count: Up to 25 words)	Ergonomic update Conduct a review of your ergonomic set-up and work structure.
Process How to apply the technique. (Approximate word count: 40-60 words)	This includes the following: <ul style="list-style-type: none"> - Review your workstation: Properly position your chair, desk, display, mouse and keyboard - Incorporate movement into your routine: Schedule set times for stretches, short walks, and even walking meetings - Take brief and frequent breaks: Schedule regular alarms for screen breaks and posture adjustments (standing up).
Potential benefits How the technique will help support your health. (Approximate word count: 20-40 words)	Ergonomics are used to limit stress on your body. In particular, this can improve your posture, limit repetitive motion injuries, reduce eye strain and minimise back pain.

Technique/ Program for Wellbeing Name and a brief description. (Approximate word count: Up to 25 words)	Mindful Mondays A weekly mindfulness session involving focused awareness and acceptance of the present.
Process How to apply the technique. (Approximate word count: 40-60 words)	Bring everyone together once a week for a group mindfulness session. Join me once a week to get comfortable and listen to a guided meditation to increase your mindfulness. Where: Conference room A When: Mondays at 11 am How: Get comfortable, sit back and listen.
Potential benefits How the technique will help support your wellbeing. (Approximate word count: 20-40 words)	Mindfulness meditation in the workplace has been linked to improved resilience, mindfulness, motivation, job satisfaction and overall performance while reducing stress, anxiety and burnout.

I will be applying the above techniques myself to manage my own personal health and well-being and look forward to enjoying better balance and improved health and well-being together.

If you have any questions, please let me know.

Kind regards

<<Add your name here>>



<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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

Task 2: Development reflection and measurement of personal work performance



To: You [...@cbsa.com.au]
From: Glenda Williams (glenda.williams@cbsa.com.au)
Date/time: Wednesday 11:10 a.m.
Subject: Health and Wellbeing – impact
Attachment: N/A

Good morning,

You have done well with your PPD task of researching, developing and implementing health and wellbeing initiatives across your team.

As a measure of your work performance in relation to your **team's** engagement, I believe you were waiting on the following information for your team:

- Employee absences: Down by 3.2 days per staff member per annum on average.
- Staff satisfaction (as captured in the employee engagement survey): On average, your team's staff satisfaction rating is 83%. Following implementation of the health and wellbeing techniques this is now at 89%.

Based on these results, as well as your experience completing this development opportunity, please complete the relevant Reflection section of your PPD Form (as commenced in Part B Task 2).

Overall, I feel the program was a success, and I look forward to seeing how you felt this worked as a development opportunity.

Kind Regards,

Glenda Williams

HR Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



Based on the completion of the development opportunity of creating and implementing health and wellbeing techniques to support your team, and in line with **Glenda's email above**, complete the Reflection section of your PPD form as developed in Part B Task 2.

Capture the following details in your reflection:

- Development opportunity undertaken: What the development opportunity entailed
- Development key deliverables or outcomes achieved: What you learnt.
- Personal or professional implications: Did it address the skill gap? What was achieved? Include any supporting program data here.
- Date of reflection: Capture the date you complete this part of the form.

Capture your answer in the PPD Form you commenced in Part B Task 2. Save this as yymmdd_yourname_BSBPEF501_02_PBT2.pdf and submit this PDF document for assessment.

(Word counts are included in the template where appropriate.)

Assessor Instructions

Students must complete a PPD Form Template and submit it for assessment as follows.

Students must complete the Reflection section of their PPD form as started in Part B Task 2. Students must capture their reflections based on the development opportunity of researching and implementing health and wellbeing techniques for their team.

Students must capture the following information in their answers:

- Development opportunities – Development of a health and wellbeing initiative for the team
- Development of key deliverables or outcomes achieved – Identifying what development they experienced through the process.
- Personal or professional implications – This identifies whether they have met their development need or not. Students have also been asked to reflect the improved absenteeism and staff engagement scores in this section as a form of measurement/proof.
- Date of reflection – This is just the date the student completed this section of the form.

Students have captured this answer in the PPD Form Template renamed as yymmdd_yourname_BSBPEF501_02_PBT2.pdf and submitted for assessment. This document reflects the answers for this task (see “Reflection”) and Part B Task 2.

A sample of the Reflections section of the form is provided below. Answers may vary but must capture the requirements outlined above.

Reflection

Development opportunity undertaken <small>(Word count: Up to 10 words)</small>	Development key deliverables or outcomes achieved <small>(What did the development teach you?)</small> <small>(Approximate word count: 20-50 words)</small>	Personal or professional implications <small>(Did this address the development need?)</small> <small>(Approximate word count: 50-70 words)</small>	Date of reflection
Creating and implementing health and well-being techniques to support my team	This opportunity provided me with a chance to: <ul style="list-style-type: none"> - conduct research - develop a core team program - successfully implemented it in my team. 	Based on my personal experience completing this process, I feel better equipped to develop and deliver programs for implementation in the future, closing this skill gap. I have also received positive feedback on the program (reduced absenteeism and increased staff satisfaction) to support my assessment of this program as a success.	1/1/xx

Assessment checklist:

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

Part A: Manage team goals and planning		
1	Team member responsibilities – <i>Project Governance Plan</i> document	<input type="checkbox"/>
2	Priority planning – <i>Project Governance Plan</i> document	<input type="checkbox"/>
3	Team member planning – <i>Project Governance Plan</i> document	<input type="checkbox"/>
4	Assess and provide feedback to Frankie – <i>email</i> template in this document	<input type="checkbox"/>
5	Assess and provide feedback to Joey – <i>email</i> template in this document	<input type="checkbox"/>
6	Manage team priorities using technology – <i>screen shot</i> in this document	<input type="checkbox"/>
Part B: Personal and professional development		
1	Team members persona and professional development – <i>PPD Form_Frankie</i> and <i>PPD Form_Joey</i> documents	<input type="checkbox"/>
2	Own personal and professional development – <i>PPD Form</i> template document	<input type="checkbox"/>
3	Seek feedback on development needs – <i>Recorded role play</i>	<input type="checkbox"/>
Part C: Manage team health and wellbeing		
1	Identify and implement health and wellbeing techniques – <i>email</i> template in this document	<input type="checkbox"/>
2	Development reflection and measurement of personal work performance – <i>PPD Form</i> template document	<input type="checkbox"/>

Congratulations! You have reached the end of Assessment 2.

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