



BSBPEF401

## MARKING GUIDE

# Manage personal health and wellbeing

Assessment 3 of 3

Project



## Assessment Instructions

### Task overview

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

- Part A: Develop strategy for managing personal health and wellbeing
- Part B: Monitor performance against key performance indicators
- Part C: Review and update health and wellbeing strategy in line with changing circumstances

Read each question carefully before typing your response in the space provided.

### Additional resources and supporting documents

To complete this assessment, you will need:

- Digital Communication in the Workplace

## 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: Develop strategy for managing personal health and wellbeing

This task requires you to develop strategy for managing personal health and wellbeing.

To begin this task, read the following scenario and email. Complete the instructions that follow.

### SCENARIO

Bounce Fitness are looking to offer a wider variety of class modes in order to reach more potential clients. This would mean adding online classes to the schedule for those sessions that can be done without any specialist equipment.

In the Cairns Bounce Fitness centre, Paul (Centre Manager) has been working hard to schedule and accommodate these extra sessions, while managing a reduction in his Fitness Instructor work hours following a request to cut back on shifts from Ashley and Jim.

**bounce fitness**  
Cairns Centre  
Staffing

*(also Fire Warden)*  
Cairns  
CENTRE MANAGER  
Paul Thomas

*(also Deputy Fire Warden/First Aid)*  
Sally Stowe  
ASSISTANT MANAGER

*(also First Aid)*  
Ashley Jackson  
FITNESS INSTRUCTOR

*(also First Aid)*  
Naomi Hamilton  
FITNESS INSTRUCTOR

*(also First Aid)*  
Lachlan Miller  
FITNESS INSTRUCTOR


Jim Hunt  
FITNESS INSTRUCTOR

David Dawson  
FITNESS INSTRUCTOR

PERSONAL INSTRUCTORS/  
FITNESS INSTRUCTORS

Paul is so busy with all these changes that he has not been able to take any breaks during his day, let alone fit in a lunch break. He has also been working back more and more to get things done and is finding it increasingly difficult to juggle his work life and his personal life.

Paul has raised this with Laura, Human Resources Manager, who has informed him that the company has a Health and Wellbeing Strategy template he can use to help him plan for and manage his health and wellbeing. Laura has recommended that once Paul has trialed this himself that he could pass this tool on to the rest of the team to help them with their own challenges in this space.

Email	
To:	paul.thomas@bouncefitness
From:	laura.irish@bouncefitness
Date:	Monday 20 <sup>th</sup> September
Subject:	Managing personal health and wellbeing strategy
Dear Paul	
<p>I am sorry to hear you are experiencing some challenges in the Cairns Centre. Thank you for reaching out and we are happy to help you develop a strategy that suits you to support your personal health and wellbeing. Please use the template <b>BSBPEF401_03_V1_Personal health and wellbeing strategy</b> and tailor it to your needs. You can use the strategy you have developed as an example to issue to the team in order to help them also manage their own personal health and wellbeing.</p> <p>Once you have completed the strategy, please send it back to me for review by the 27<sup>th</sup> of September.</p>	
<b>Human Resources Manager</b> Laura Irish	
	

**Task 1 - Complete strategy template and scheduling of activities**

For this task, you will assume the role of Paul Thomas and complete the *Personal Health and Wellbeing Strategy* template below.

 <b>Personal health and wellbeing strategy</b>			
SECTION A			
Developed by		Approved by	
<b>Name:</b> [insert your name]	<i>Student Name</i>	<b>Name:</b>	Laura Irish
<b>Position:</b> [insert position]	<i>Centre Manager</i>	<b>Position:</b>	Human Resources Manager
<b>Date:</b> [insert date completed]	<i>27<sup>th</sup> September</i>	<b>Date:</b>	x/x/xx

<b>Signature:</b> <i>[Insert signature]</i>	<b>Paul Thomas</b>	<b>Signature</b>	
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**SECTION B**

<b>Goals</b> <i>[insert what goals you are aiming to achieve in relation to personal health and wellbeing. Approximately 25-30 words]</i>	<p><b>Assessor Instructions:</b> Student must identify what goals they aim to achieve in relation to personal health and wellbeing.</p> <p>Responses will vary, however, they must align with the scenario and the pressures of low staffing.</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>- Find work life balance.</li> <li>- Ensure daily lunchbreaks are taken</li> <li>- Support staff with work pressures.</li> <li>- Integrate additional exercise and meditation for mental health.</li> <li>- Model techniques for stress management.</li> <li>- Upskill staff and provide training.</li> <li>- Recruit more staff to cater for the staff loss.</li> </ul>
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<b>Health concern</b> <i>[Insert what health concerns you have. Approximately 25 words]</i>	<b>Strategy/Activity to complete</b> <i>[Insert the strategy or activity you aim to implement to manage the health concern. Approximately 20 words.]</i>	<b>Resources needed</b> <i>[Insert a list of resources you will require to implement the strategy/ activity. List 2-3 resources]</i>	<b>Time frame</b> <i>[Insert a time frame of how long you plan to participate in each activity]</i>
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<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a health concern they have due to work pressures.</p> <p>Sample benchmark answers have been provided below.</p> <ul style="list-style-type: none"> <li>▪ Working longer hours due to staff shortage, causing fatigue and stress</li> <li>▪ Work life balance is slipping, not integrating enough physical activity or mental health care.</li> <li>▪ Poor diet due to not taking regular breaks.</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a strategy or task to complete to help achieve their goal</p> <p>Sample benchmark answers have been provided below.</p> <ul style="list-style-type: none"> <li>▪ Integrate small amounts of physical activity throughout the day.</li> <li>▪ Take lunch and tea breaks</li> <li>▪ Actively practice meditation throughout the day</li> <li>▪ Prioritise most important tasks</li> <li>▪ Delegate tasks to other personnel</li> <li>▪ Recruit more staff</li> <li>▪ Upskill existing staff</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a resource they will need to help achieve their goal.</p> <p>Sample benchmark answers have been provided below.</p> <ul style="list-style-type: none"> <li>▪ Discuss or seek advice for the integration of daily exercise with one of the personal trainers [Human resource]</li> <li>▪ Meditation app with guided meditation techniques.</li> <li>▪ Discuss and research professional development to upskill existing staff.</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify how long or how often they intend to participate in the activity.</p> <p>Sample benchmark answers have been provided below.</p> <ul style="list-style-type: none"> <li>▪ Physical activity may be as simple as 5-10 minutes a day or every second day</li> <li>▪ 30-minute lunch break with two [2] additional 15-minute tea breaks</li> </ul>
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**SECTION C**

<p><b>Weekly Schedule</b> <i>[Create a log of when you plan to schedule in time for health and wellbeing activities.]</i></p> <p><b>Assessor instructions:</b> Student responses will vary according to how they would plan their day. Sample</p>
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benchmark answers have been provided.

Time of day	Monday	Tuesday	Wednesday	Thursday	Friday
09:00 am					
10:00 am	Morning tea break 10 minutes of exercise	Morning tea break	Morning tea break 10 minutes of exercise	Morning tea break	Morning tea break 10 minutes of exercise
11:00 am		Meditation			
12:00 pm	Lunch break	Lunch break	Lunch break	Lunch break	Lunch break
01:00 pm			Meditation		
02:00 pm	Meditation				Meditation
03:00 pm	Afternoon tea break	Afternoon tea break	Afternoon tea break	Afternoon tea break Meditation	Afternoon tea break
04:00 pm					
05:00 pm					

### Task 2: Email health and wellbeing strategy for approval

For this task you will need access to [Digital Communication in the Workplace](#) document.

Commented [TM1]: Link to policy

Prepare an email response to Laura Irish (the Human Resources Manager) and attach the plan for their feedback. Apply all guidelines around the professional communication etiquette outlined in the Bounce Fitness Digital communication policies and procedures document.

(Approximately 50-60 words)

#### Assessor instructions:

Student must complete the email template below informing the Human Resources manager the plan is ready for approval.

Students must use formal language as appropriate for an official communication to the Human Resources Manager. Students must apply all professional communication etiquette (as set out in the Bounce Fitness Digital communication policy and procedure) - specifically:

- Including proper greetings at the start of each email
- Follow proper grammar and correct sentence structures
- Using polite language in all communication.

Email	
To:	<a href="mailto:laura.irish@bouncefitness">laura.irish@bouncefitness</a>
From:	<a href="mailto:paul.thomas@bouncefitness">paul.thomas@bouncefitness</a>
Date:	Monday 27 <sup>th</sup> September
Subject:	Personal health and wellbeing strategy
<p><i>Dear Laura,</i></p> <p><i>I hope you are well. Thank you for your response and providing me with the template to develop the personal health and wellbeing strategy. I have completed the strategy and included activities and resources required to</i></p>	

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ensure they are facilitated properly.

Please find attached **Personal health and wellbeing strategy**.

If you have any additional advice or suggestions, I would be open to hearing them and work towards implementing them in the plan.

Thank you once again for your support on this, it is greatly appreciated.

**Centre Manager**  
**Paul Thomas**



**Part B: Monitor performance against key performance indicators**

Read Laura's response to the plan and complete the instructions that follow.

Email	
To:	paul.thomas@bouncefitness
From:	laura.irish@bouncefitness
Date:	Monday 27 <sup>th</sup> September
Subject:	Personal health and wellbeing strategy

Dear Paul,

Thank you for completing the health and wellbeing strategy. It looks like you have covered quite a bit in terms of managing your health and wellbeing and I am happy for you to proceed with implementing the plan.

You will need to ensure that you are monitoring your own performance, in the areas of mental health and wellbeing.

You need to meet the following Key Performance Indicators (KPIs)

- KPI 1: Practice one minute of meditation per day.
- KPI 2: Practice at least one form of exercise a minimum of two (2) times per week.

I have provided you with some guided meditation resources you can use to kick start your meditation, you are welcome to use these, or you research your own.

- [5 Minute Mindfulness Meditation](#)
- [Headspace- five minute meditation](#)
- [Smiling Mind](#)

Capture the amount of time you will be spending on meditation activities during the day and log it with any distractions that may have arisen during your meditation sessions using the template provided. You can start with one [1] minute and gradually work your way up.


**Human Resources Manager**

Laura Irish



**Task 1: Complete the KPI Logbook**

Use the template below to monitor the key performance indicators (KPI) outlined in the scenario.



### Key Performance Indicator Logbook

Day	Date <i>[Insert the date you completed the planned performance task]</i> <b>Assessor Instructions:</b> Student response will vary according to the dates they have participated in the activity. Sample benchmark answers have been provided.	KPI 1: Practice one minute of meditation per day. <i>Identify how you performed the activity.</i> <b>Assessor Instructions:</b> Student responses will vary; however, student must identify how they performed the meditation activity. Sample answers have been provided	Time <i>[Insert how long you will be participating in this task using minutes.]</i> <b>Assessor Instructions:</b> Student responses will vary; however, student must indicate how long they spent on the activity in minutes. Sample answers have been provided.	KPI 2: Practice at least one form of exercise a minimum of two [2] times per week. <i>Identify how you performed the activity</i> <b>Assessor Instructions:</b> Student responses will vary; however, student must identify how they performed the physical activity. Sample answers have been provided	Time: <i>[Insert how long you will be participating in this task using minutes]</i> <b>Assessor Instructions:</b> Student responses will vary; however, student must indicate how long they spent on the activity in minutes. Sample answers have been provided.
Monday	27/09/22	Guided Meditation	1 minute	Yoga	15 Minutes
Tuesday	28/09/22	Breathwork	2 minutes		
Wednesday	29/09/22	Breathwork	3 minutes	Outdoor walk	30 minutes
Thursday	30/09/22	Meditation	4 minutes		
Friday	1/10/22	Progressive muscle relaxation.	5 minutes	Outdoor walk	45 minutes



### Part C: Review and update health and wellbeing strategy in line with changing circumstances

Read the scenario and complete the instructions that follow.

<p><b>Scenario</b></p> <p>With the staff shortages and longer hours expected of the existing trainers, most of the trainers working a 10-hour day, Naomi and David have both resigned.</p> <p>This leaves the center down two full time Fitness Instructors and only one First Aid trained team member who only works core business hours, leaving no one before 9am and after 5pm or on weekends.</p> <p>The resignations have resulted in three (3) new trainers being employed, Beck, Natasha, and Kevin. Beck has over a decade worth of experience and is a valued asset. While the new employees are a welcomed addition, they are not yet able to run classes unsupervised until they have completed their induction training at Bounce, putting added pressure on Paul and the rest of the staff until training is complete.</p> <p>Within the last week, Paul has had his sister, brother-in-law and niece relocating from interstate. They will be living with him and his wife for the foreseeable future. Paul has offered to help them find somewhere more permanent to live.</p> <p>Paul is now needing to ensure he is able to spend quality time with his family, help his sister find somewhere to live, keep on track with his mindfulness and physical activity along with the fitness centre is being run properly in his absence.</p>
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#### Task 1: Modify Health and Wellbeing strategy

Assume the role of Paul and revisit the *Personal Health and Wellbeing Strategy* you developed in Part A Task 1 above. Copy what you developed above for Section A, B and C and update any changes according to the new circumstances in the workplace.

You will need to identify at least two (2) new circumstances outlined in the scenario one (1) work related and one (1) personal. Outline what changes you have made to the plan and why you have implemented them in Section D.

 <p><b>Personal health and wellbeing strategy</b></p>			
<b>SECTION A</b>			
<b>Developed by</b>		<b>Approved by</b>	
<b>Name:</b> [insert your name]	Student Name	<b>Name:</b>	Laura Irish
<b>Position:</b> [insert position]	Centre Manager	<b>Position:</b>	Human Resources Manager
<b>Date:</b> [insert date completed]	27 <sup>th</sup> September	<b>Date:</b>	
<b>Signature:</b> [insert signature]	Paul Thomas	<b>Signature:</b>	Laura Irish

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SECTION B			
<p><b>Goals:</b> [Insert what goals you are aiming to achieve in relation to personal health and wellbeing. Approximately 25-30 words]</p>	<p><b>Assessor Instructions:</b> Student must identify what goals they aim to achieve in relation to personal health and wellbeing. Responses will vary; however, they must align with the scenario and the pressures of low staffing.</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>Find work life balance.</li> <li>Ensure daily lunchbreaks are taken</li> <li>Support staff with work pressures. Integrate additional exercise and meditation for mental health. Model techniques for stress management.</li> </ul>		
<p><b>Health concern</b> [Insert what health concerns you have. Approximately 25 words]</p>	<p><b>Strategy/Activity to complete</b> [Insert the strategy or activity you aim to implement to manage the health concern. Approximately 20 words.]</p>	<p><b>Resources needed</b> [Insert a list of resources you will require to implement the strategy/activity. List 2-3 resources]</p>	<p><b>Time frame</b> [Insert a time frame of how long you plan to participate in each activity]</p>
<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a health concern they have due to work pressures.</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>Working longer hours due to staff shortage, causing fatigue and stress</li> <li>Work life balance is slipping, not integrating enough physical activity or mental health care.</li> <li>Poor diet due to not taking regular breaks.</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a strategy or task to complete to help achieve their goal</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>Integrate small amounts of physical activity throughout the day.</li> <li>Take lunch and tea breaks</li> <li>Actively practice meditation throughout the day.</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify a resource they will need to help achieve their goal.</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>Discuss or seek advice for the integration of daily exercise with one of the personal trainers (Human resource)</li> <li>Meditation app with guided meditation techniques.</li> </ul>	<p><b>Assessor Instructions:</b> Student responses will vary. Student must identify how long or how often they intend to participate in the activity.</p> <p>Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>Physical activity may be as simple as 5-10 minutes a day or every second day</li> <li>30-minute lunch break with two (2) additional 15-minute tea breaks</li> </ul>

SECTION C:					
Weekly Schedule					
[Create a log of when you plan to schedule in time for health and wellbeing activities]					
<b>Assessor instructions:</b> Student responses will vary according to how they would plan their day. Sample benchmark answers have been provided.					
Time of day	Monday	Tuesday	Wednesday	Thursday	Friday
09:00 am				Staff check in	Paul N/A
10:00 am	Morning tea break 10 minutes of	Morning tea break	Morning tea break 10 minutes of	Morning tea break	Morning tea break 10 minutes of

	exercise		exercise		exercise
11:00 am		Meditation <b>Team building</b> Meditation group session with Paul, Lachlan and Beck			<b>Team building</b> Meditation group session with Paul, Natasha and Jim
12:00 pm	Lunch break	Lunch break	Lunch break	Lunch break	Lunch break
01: 00 pm			Meditation		
02:00 pm	Meditation			<b>Team building:</b> Meditation group session with Paul Ashely and Kevin	Meditation
03:00 pm	Afternoon tea break	Afternoon tea break	Afternoon tea break	Afternoon tea break Meditation	Afternoon tea break
04:00 pm		<b>Paul N/A</b>		<b>Paul N/A</b>	
05:00 pm					

**SECTION D:**

<p><b>Changed circumstances</b> <i>(Identify at least two (2) changed circumstances One (1) personal and one (1) work related.)</i></p>	<p><b>Assessor instructions:</b> Students must identify at least two (2) changed circumstances according to the scenario. One (1) personal and one (1) work related. Student answers will vary; however, they must include one of each of the following (Sample answers have been provided below.):</p> <p><b>Personal</b></p> <ul style="list-style-type: none"> <li>▪ Paul's family arriving from interstate</li> <li>▪ Needing to be home to spend time with them</li> <li>▪ Factoring time for mindfulness and physical activity.</li> </ul> <p><b>Work related</b></p> <ul style="list-style-type: none"> <li>▪ Staff resignations</li> <li>▪ Staff needing additional First Aid training to replace the first aiders</li> <li>▪ New staff employed</li> <li>▪ New staff need supervision with the running of classes</li> <li>▪ Team feeling disconnected.</li> </ul>
<p><b>Notes of changes:</b> <i>(Indicate what changes you have made to the strategy and why. Approximately 50-100 words)</i></p>	<p><b>Assessor instructions:</b> Student responses will vary according to what changes they have implemented. Sample answers have been provided below.</p> <ul style="list-style-type: none"> <li>▪ <b>Staff check in</b> A staff check in has been scheduled in every week to catchup with the team to see how they are doing and start to build back that sense of rapport. This is also to support the professional relationship between Paul and the rest of the team.</li> <li>▪ <b>Team building group sessions</b> Meditation group sessions have been scheduled in during the week for the team to participate in together to help ensure they are taking care of their personal health and wellbeing and encourage team building. Paul will facilitate these sessions and participate in them as well with the team. Teams have been arranged to pair the new staff with existing staff.</li> <li>▪ <b>Paul adjusting his shifts</b> Paul has blanked out some time during the week where he starts later or finishes earlier in order to spend time with his family and address his his mental health and physical wellbeing.</li> </ul>

**Assessment checklist:**

Students must have completed all three (3) parts within this assessment before submitting. This includes:

Part A Develop strategy for managing personal health and wellbeing		
1	Personal Health and Wellbeing Strategy template and scheduling of activities	<input type="checkbox"/>
2	Email Personal Health and Wellbeing Strategy for approval	<input type="checkbox"/>
Part B Monitor performance against key performance indicators		
1	KPI Logbook template	<input type="checkbox"/>
Part C Review and update health and wellbeing strategy in line with changing circumstances		
1	Personal Health and Wellbeing Strategy template	<input type="checkbox"/>



**Congratulations you have reached the end of Assessment 3**

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