



**BSBTWK502**

# Manage team effectiveness

Assessment 3 of 3

Project

**Assessor Guide**



## Assessment Instructions

### Task overview


You are required to review CBSA's policy and procedure for promoting team member accountability for personal work and team tasks to ensure they are effective to support the achievement of organisational goals.

The assessment consists of **two (2)** tasks:

- Task 1: Review policy document
- Task 2: Email CBSA's Managing Director

### Additional resources and supporting documents:

- CBSA's Performance Management Policy and Procedure

	<p>The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, you will access information, templates and workplace documents associated with CBSA.</p> <p>You can access <a href="#">CBSA's website</a> to familiarise yourself with what CBSA does and the services it provides.</p>
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## 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.

## Scenario

Read the following email and complete the tasks that follow:



To: Sam Fischer (sam.fischer@cbsa.com.au)  
From: Gavin Stead (gavin.stead@cbsa.com.au)  
Date/time: Tuesday 9:51 a.m.  
Subject: Performance Management Policy and Procedure  
Attachment: Policy Review Form template .docx

Good morning Sam,

Previously, you have successfully worked with Kelly to manage her performance. I would like you to review our current Performance Management Policy and Procedure using the attached 'Policy Review Form' template and make suggestions on how we could improve it based on your experience, to ensure that it adequately promotes team member accountability for personal work and team tasks.

Please send through your suggested amendments in an email, so I can review and approve them. Don't forget to attach the completed Policy Review Form as well. Please include our HR Consultant, Jill Kerr, in the email and invite her to provide specialist input on your recommendations.

Kind regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



### Task 1: Review CBSA's Performance Management Policy and Procedure

Following Gavin's email instructions, review CBSA's *Performance Management Policy and Procedure* to ensure it adequately promotes team members' accountability for personal work and team tasks. Complete the following *Policy Review Form* to capture your findings and to make suggestions for improvements. [Note: CBSA's *Performance Management Policy and Procedure* document can be found in the LMS, on the assessment's landing page.]

**Assessor instructions:** All sections/questions within the Policy Review Form must be completed. Refer to the template for sample answers and benchmarks.

#### Policy Review Form

Name of Organisation: CBSA

Date: Today's date

Name of policy/policies reviewed: <b>Performance Management</b>
Provide a summary of the policy's purpose [40-60 words]
The purpose of the Performance Management Policy Complete Business Solutions Australia (CBSA) is to support the development and skill of our staff and provide them the opportunity to acquire professional development and receive real-time feedback regarding their performance. We aim to ensure the highest quality of service to its clients.
Evaluation: Outline the findings of the review, including the areas covered. Does the policy and procedure document adequately promote team members' accountability for personal work and team tasks? [80-100 words]
<p>The policy provides good detail about induction, training, professional development options and a process for staff appraisals.</p> <p>The policy provides a process to manage complaints, performance reviews, performance issues and warnings and termination process.</p> <p>There is no clear expectation regarding teamwork and acceptable behaviour at the workplace. Also, there is no clear process for managing negative behaviour and interactions with others; inability or reluctance to follow procedures or instructions; not following job descriptions. Nor any details of the impact of this on the organisation's goals. Performance issues are at the manager's discretion which could lead to further conflicts.</p>
Changes required to policy / not required What changes are required, OR why are changes not required? [100-120 words]
<ul style="list-style-type: none"> <li>• Relevant legislation should be listed for reference</li> <li>• Key terms are not defined. This could lead to confusion or misinterpretation.</li> <li>• The policy should define poor performance and high performance and it should link them to clear KPIs.</li> <li>• Procedure is not clearly set out – consider numbered steps.</li> <li>• A process needs to be in place to manage poor performance better.</li> <li>• The policy should include expectations regarding teamwork and team members' accountability.</li> </ul> <p>For example, CBSA values its staff and looks for ways that we can support them to identify the factors leading to poor performance.</p> <p>This may include counselling where an external personal issue impacts performance or professional development, such as mentoring and coaching if staff are struggling to meet the demands of their job role.</p>

## Task 2: Email CBSA's Managing Director

Using the template provided, write a response email to Gavin Stead, CBSA's Managing Director, to communicate the policy review findings and seek his approval. Include Jill Kerr, HR Consultant in the email, and invite her specialist input on your recommendations.

The email will use professional language and will contain 4-5 paragraphs, including:

- Summary of the policy review
- Summary of the amendments to the policy to ensure its effectiveness

- Seeking approval from the Managing Director to proceed with the amendments.
- Inviting the HR Consultant's input on the suggestions.

Assessor instructions:

Student is required to write an email to Gavin Stead, Managing Director to communicate the policy review findings and seek his approval. Student must include Jill Kerr, HR Consultant in the email, inviting her specialist input on the recommendations made. See sample answers provided below for guidance.

EMAIL TEMPLATE	
To:	<<Add name(s) of main email recipients here>> Gavin Stead
From:	<<Add your name and email address here>> Sam Fischer [sam.fischer@cbsa.com.au]
CC:	<<Add names of carbon copy email recipients here (leave blank if none)>> Jill Kerr
BCC:	<<Add names of blind carbon copy email recipients here (leave blank if none)>> Student should leave this empty
Date/Time:	<<Add the time and date of the email here>> E.g., 17/10/2023 10.30 am
Subject:	<<Add the subject of the email here>> E.g., My findings regarding the Performance Management Policy (or similar)
Attachments:	<<Add the name of any attachments here (leave blank if none)>> Policy Review Form
<p>Good morning/Good afternoon &lt;&lt;Add recipient(s) here&gt;&gt;, &lt;&lt;Add message here. Add as much space as necessary.&gt;&gt;</p> <p>For example:</p> <p>Good afternoon Gavin and Jill,</p> <p>Thank you for the opportunity, Gavin, to allowing me to review CBSA's Performance Management Policy and Procedure. As you emphasised in your email, the aim of the policy review was to ensure that it adequately promotes team member accountability for personal work and team tasks.</p> <p>Attached to this email you can see the completed 'Policy Review Form' with my findings, waiting for your approval.</p> <p>Based on my review, I can state the following:</p> <ul style="list-style-type: none"> <li>• The policy provides good detail about induction, training, professional development options and a process for staff appraisals.</li> <li>• The policy provides a process to manage complaints, performance reviews, performance issues and warnings and termination process.</li> <li>• There is no clear expectation regarding teamwork and acceptable behaviour at the workplace. Also, there is no clear process for managing negative behaviour and interactions with others; inability or reluctance to follow procedures or instructions; not following job descriptions. Nor any details of the impact of this on the organisation's goals. Performance issues are at the manager's discretion which could lead to further conflicts.</li> </ul> <p>I'm suggesting the following recommendations:</p>	

- Relevant legislation should be listed for reference
- Key terms are not defined. This could lead to confusion or misinterpretation.
- The policy should define poor performance and high performance and it should link them to clear KPIs.
- Procedure is not clearly set out – consider numbered steps.
- A process needs to be in place to manage poor performance better.
- The policy should include expectations regarding teamwork and team members' accountability.
- For example, CBSA values its staff and looks for ways that we can support them to identify the factors leading to poor performance. This may include counselling where an external personal issue impacts performance or professional development, such as mentoring and coaching if staff are struggling to meet the demands of their job role.

As per your instructions, I have copied Jill in this email, so she can also review my suggestions and kindly provide her specialist input.

Let me know what you think once you had a look at the attached documents.

Many thanks,

Sam Fischer

Business Development and Marketing Manager

Kind regards,

<<Add your name here>>

<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



## Assessment checklist:

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

Task 1	Review the policy document and complete the <i>Policy Review Form</i>	<input type="checkbox"/>
Task 2	Email your findings to the Managing Director	<input type="checkbox"/>



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

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