



BSBLDR601

ASSESSOR GUIDE

Lead and manage organisational change

Assessment 2 of 2

Project and observation

Assessment Instructions

Task overview

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

- Part A – Prepare for presentation [project]
- Part B – Conduct presentation [project observation]
- Part C – Prepare an evaluation report and update your plan [project]

In this assessment, you will implement, evaluate and review a change management plan. In Part A, you will prepare for a presentation. In Part B, you will deliver the presentation, and in Part C, you will adjust your plan based on the feedback you receive in Part B.

Read the case study and complete each part.

Additional resources and supporting documents

To complete this assessment, you will need:

- Access to learning resource
- Access to a computer, internet, word processing software and presentation software such as PowerPoint
- CBSA organisational policies and procedures [accessible via the CBSA website]
- Students to play the role of CBSA staff members [Part B]

Assessment Information



Submission

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

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

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



Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

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



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

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




Please consider the environment before printing this assessment.

Task instructions (for the student) Part A: Prepare for presentation

Case study: You work as Adrian Russo at CBSA. Gavin Stead, Managing Director, has sent you the following e-mail and attachments.

To begin this part, read the following e-mail and its attachment, then complete the tasks that follow:

	To: Adrian Russo [adrian.russo@cbsa.com.au]
	From: Gavin Stead [gavin.stead@cbsa.com.au]
	Date/time: Monday 10:07 a.m.
	Subject: Change Management Presentation


Good morning Adrian,

I want you to deliver a presentation to our staff about the planned changes. The purpose of this presentation is two-fold:

- to inform them of the change
- to get their feedback about the proposed change

Can you please begin preparing for this presentation? I will let you know the presentation date.

Kind Regards,
Gavin Stead
Managing Director
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au



Steps

You will prepare for a presentation that will be delivered to staff about planned changes.

Scenario: For the purpose of this task, assume that one of your communication and education strategies (in your Communication Plan) was to invite staff to an information session about the planned changes. As part of this communication, staff will have the opportunity to complete an online survey regarding their feelings about the change and how well they think CBSA communicated the change.

Based on the e-mail, prepare for the presentation by completing the following steps.

1. Complete the following CBSA e-mail template to advise staff of the meeting arrangements, including time, place, and enough information to entice them to come along. Approximate word guide: 50 words

To:	All staff
From:	Student name (or Adrian Russo)
Date/time:	Date/time

Subject	Subject must be relevant to step, e.g., Change meeting
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Salutation (Salutation such as Dear staff, Hello staff)

E-mail body

E-mail body must:

- Include meeting details, including time, place, and information, to entice them to come along.

For example,

I am writing to invite you to a meeting on dd month yy at hh:mm in the staff conference room.

During the meeting, we will be presenting information about upcoming organisational changes. This will be an opportunity for you to provide your feedback and ask questions.


Student name

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



2. Prepare survey questions. Document five questions that can be used to gather the attendee's thoughts and feelings about the change in general, the changes you have proposed, and how they think CBSA has communicated change previously. The attendees will complete this at the conclusion of the presentation.
3. Prepare the presentation. Develop a PowerPoint presentation or use similar software to communicate information about the changes, change management process, benefits and to seek feedback. You will use the PowerPoint presentation in Part B to deliver a 15–20 minute presentation. Your presentation must be suitable for the audience and use easy-to-understand language.

Submission instructions

Submit your assessment via the LMS.

Assessor instructions Part A: Part A: Prepare for presentation

Purpose of task

This part is designed to ensure that the student can prepare for implementing the change management plan by disseminating information and requesting feedback.

Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

Send details of the date, time, and location of the presentation to the student so that they can include the information in their communications. Arrange for at least three other students to participate in the presentation as well – these students may complete their presentations at the same time.

1. CBSA e-mail template

The student completed the e-mail template to advise staff of the meeting arrangements, including time, place, and enough information to entice them to come along. Approximate word guide: 50 words

To:	All staff
From:	Student name (or Adrian Russo)
Date/time:	Date/time
Subject	Subject must be relevant to step, e.g., Change meeting

Salutation (Salutation such as Dear staff, Hello staff)

E-mail body

E-mail body must:

- Include meeting details, including time, place, and information, to entice them to come along.

For example,

I am writing to invite you to a meeting on dd month yy at hh:mm in the staff conference room.

During the meeting, we will be presenting information about upcoming organisational changes. This will be an opportunity for you to provide your feedback and ask questions.


Student name

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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2. Survey questions.

The student prepared survey questions including five questions that can be used to gather the attendee's thoughts and feelings about the change in general, the changes you have proposed, and how they think CBSA has communicated change.

There is no format criteria. Responses can be questions listed or completed in a survey rating questionnaire. All fields must be completed. At the diploma level, students will have innovative ideas so questions will be varied.

3. Presentation.

The student developed a PowerPoint presentation or use similar software to communicate information about the changes, change management process, benefits and to seek feedback.

The presentation must be suitable for the audience and use easy-to-understand language.

At the diploma level, students will have innovative ideas and lateral thinking. Therefore, presentation formats and content will be varied.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

Marking criteria Part A: Part A: Prepare for presentation

Assessment submission checklist

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

Part A: Prepare for presentation		
1.	CBSA e-mail template communication to staff	<input type="checkbox"/>
2.	Survey questions	<input type="checkbox"/>
3.	PowerPoint or similar presentation	

Assessment marking criteria


Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
1.	The student submitted a CBSA e-mail template to communicate meeting arrangements and clearly communicated: <ul style="list-style-type: none"> time, place, information about why they need to come along 	<input type="checkbox"/> S	<input type="checkbox"/> NYS
2.	The student submitted survey questions including: <ul style="list-style-type: none"> 5 relevant questions to gather feedback about the proposed changes. 	<input type="checkbox"/> S	<input type="checkbox"/> NYS
3.	The student submitted a PowerPoint presentation (or similar) suitable for 15-20 minutes, communicated the change management plan, and used clear and precise language. Look for: <ul style="list-style-type: none"> Easy to understand language, no jargon Content was suitable for the audience Communicated change management process Communicated benefits of organisational change, including increase profit and to remain viable Use strategies to communicate and embed change, including change vision and seeking feedback 	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Task instructions (for the student) Part B: Conduct presentation (role plays/observations)

To begin this part, read the following e-mail and then complete the tasks that follow:


	<p>To: Adrian Russo (adrian.russo@cbsa.com.au)</p> <p>From: Gavin Stead (gavin.stead@cbsa.com.au)</p> <p>Date/time: Wednesday 11:18 a.m.</p> <p>Subject: Presentation</p>
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Good morning Adrian,

Just letting you know I won't be attending the presentation later today as I have a prior engagement. Hopefully, the staff will be on board with your proposed changes. Please send through a report on how it went.

Kind Regards,
Gavin Stead

Managing Director
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au



Steps

Based on the e-mail, you are to complete the following tasks:

1. Conduct the presentation in the designated timeframe
 - a) You (Adrian) and a minimum of three (3) other students (or volunteers) will role-play the part of staff members.
 - b) You must provide the opportunity for input and feedback and seek ideas or suggestions on the change process from the group.
 - c) You must demonstrate effective communication skills and appropriate language to respond to issues and questions.
 - d) Bear in mind that there will be some sensitivities, as some staff members may be resistant to change. One of the staff members will be upset, and you will need to handle this. You will need to use your problem-solving skills to work out how to handle this situation and apply effective negotiation and consultation skills.

Before the role-play meeting

To prepare for this meeting, please provide the participants role-playing the staff members information regarding the scenario to allow them to prepare and contribute to the meeting.

You will need to familiarise yourself with your role to lead and discuss this meeting. You should also brief one of the students to voice concerns about the changes and choose a range of concerns.

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

- Lead the presentation and discussion
- discuss and seek information using appropriate structure and language for the particular audience
- use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees
- can disseminate information about proposed changes to staff members and gauge their feedback about the changes.
- clearly activate their strategies in the presentation – risk management and embedding the change
- respond to any questions, feedback, resistance, and barriers raised to the change in accordance with risk management plans and organisational objectives
- use active listening and questioning techniques to ensure meeting attendees' understanding.

During the meeting, the staff must:

- Ask questions and voice any concerns
- Determine one concern to raise during the presentation
- Collaborate with the team to come an agreed solution.

At the end of the meeting, have the attendees complete the student's survey so that the student can use this feedback for the next assessment task.

Option 1: Industry Peers OR Student participant/s

Role play instructions

The role-play/meeting must include at least three (3) participant/s, must not exceed 20 minutes and must address all elements of the Observation Checklist below.

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

1. Peer/s who you are already working with in the industry your qualification relates to.
2. Fellow student/s who will play the role of a team member. Please contact your fellow student/s via the Discussion Forum and coordinate your role-play with them directly.

If you are unable to find a participant/s to play the role of the other team member/s, contact your assessor via the Discussion Forum or Live Q&A Sessions , who will discuss *options for pairing up with another student/s to complete this task.*

Option 1: Peer/s participant

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

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

Option 2: Fellow student/s participant

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

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

Recording instructions

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

Consent to participate in the recording must be captured for all participant/s at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course. This session will be recorded and submitted through my course online learning platform to my assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Submission instructions

Submit a recording of your role play/observation via the LMS.

Assessor instructions Part B: Conduct presentation

There is no submission due date for this task. Students may submit this task when they are ready.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

Purpose of task

This part is designed to ensure that the student can disseminate information about proposed changes to staff members and gauge their feedback about the changes.

Guidance to assessor about the task

The meeting must comprise a minimum of three fellow students (or volunteers) to role-play the parts of staff members. The Assessor should also observe one concern to raise during the presentation. Some example concerns include:

- relocation of head office
- lack of skills in existing staff regarding new services to be offered
- concerns that this is the right strategy for the business to pursue
- poor implementation of changes that have previously occurred, leading to low morale.

One of students should voice concerns about the changes and choose a range of concerns so that students do not respond to the same concerns. To complete this task satisfactorily, the student must demonstrate appropriate and effective oral communication skills and interact with others in the group. The student must also clearly activate their strategies in the presentation – risk management and embedding the change.

At the end of the meeting, have the attendees complete the student's survey so that the student can use this feedback for the next assessment task.

There is no submission due date for this task.

Review all evidence and mark using the assessment checklist and marking criteria listed below.

Marking criteria Part B: Conduct presentation

Assessment checklist

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

Part B: Conduct presentation		
1.	Role-play video evidence – Presentation not exceeding 20 minutes	<input type="checkbox"/>

Observation checklist


The assessor observed the student's skills and satisfactorily [S] covered the following criteria or not yet satisfactory [NYS] and requires re-assessment.

MARKING CRITERIA / OBSERVATION CHECKLIST [To be completed by the Assessor when they watch the video or observe the assessment in real-time as they conduct the assessment]		Satisfactory [S]	Not Yet Satisfactory [NYS]
1.	The student conducted the presentation and demonstrated the following skills:		
	• lead the presentation and discussion	<input type="checkbox"/>	<input type="checkbox"/>
	• discuss and seek information using appropriate structure and language for the particular audience	<input type="checkbox"/>	<input type="checkbox"/>

	<ul style="list-style-type: none"> • use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> • respond to any questions, feedback, resistance, and barriers raised to the change in accordance with risk management plans and organisational objectives 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> • use active listening and questioning techniques to ensure meeting attendee understanding. 	<input type="checkbox"/>	<input type="checkbox"/>

Task instructions (for the student) Part C: Prepare an evaluation report and update your plan

To begin this part, read the following e-mail and then complete the tasks that follow:




To: Adrian Russo (adrian.russo@cbsa.com.au)
From: Gavin Stead (gavin.stead@cbsa.com.au)
Date/time: Thursday 12:28 p.m.
Subject: Presentation Report and Updates to Plan

Good afternoon Adrian,

Please prepare an evaluation report on how the presentation went and include the reactions and feedback from the staff and whether any changes should be implemented into the plan.

Kind Regards,
Gavin Stead
Managing Director
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au



TASK INSTRUCTIONS

Refer to the presentation and feedback you received in Part B: Conduct presentation.

Steps

Based on the e-mail and Part B information, complete the following tasks:

1. Use the **CBSA Evaluation Report** template to evaluate the presentation and feedback from the staff survey.
 - a) Outline how effective your presentation and communication to staff were against communication and project objectives.
 - b) Evaluate how you responded to the barriers of the change and how effective your strategies to embed the change will be over the lifetime of the change management plan based on feedback from staff.
 - c) Recommend at least one modification to your plan to respond to barriers to change.
 - d) Discuss the ideas and suggestions the staff made and whether you will include them in your plan.
 - e) Evaluate the survey comments and make at least one recommendation for a modification to your Change Management Plan. Save the change management plan as V2. [Version 2]

Word guidance: 120-150 words

CBSA EVALUATION REPORT

<p>Name of change/project</p>	
<p>Effectiveness of presentation and communication to staff against communication and project objectives</p>	
<p>Recommendation – at least one modification to your plan to respond to barriers to change</p>	
<p>Ideas and suggestions made by staff and whether or not these will be included in the change management plan</p>	
<p>Evaluate survey comments and make at least one recommendation for a modification to your Change Management Plan</p>	

- Update your project plan to incorporate your recommendations and the changes to the Action plan, the Communication or Training plans to include the activities and timeframes for this assessment (the information session and staff survey).

Submission instructions

Submit your assessment via the LMS.

Assessor instructions Part C: Prepare evaluation report and update your plan

Purpose of task

This part is designed to ensure that the student can review and evaluate the change management project plan based on feedback from stakeholders.

Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

The student must submit a report evaluating their presentation and how the information was received.

They must make at least one recommendation to change the plan based on the feedback they received during the presentation and the staff survey comments and discuss the ideas and suggestions that staff made.

The student is required to update their plan. Ensure that the revision history is correct and that Version 2 is the one submitted.

A benchmark example of CBSA evaluation report is provided below. At the diploma level, students will have innovative ideas can use a range of ways to communicate. It is expected that answers will vary for each student. A benchmark example is provided below.

CBSA EVALUATION REPORT	
Name of change/project	Name of change/project
Effectiveness of presentation and communication to staff against communication and project objectives	<i>The student must evaluate the presentation and communication to staff against communication and project objectives.</i>
Recommendation – at least one modification to your plan to respond to barriers to change	<i>The student must identify a modification to the plan to respond to a barrier to change. Examples can address actions to address fear of the unknown, loss of control, threat of losing a position or status, threat of increased workload, becoming obsolete, cost. For example, consultation sessions, training, developing procedures, providing more information about relocating.</i>

<p>Ideas and suggestions made by staff and whether or not these will be included in the change management plan</p>	<p><i>The student must document the ideas and suggestions provided during the presentation.</i></p> <p><i>Justification about whether or not the changes will be included in the change management plan must be included.</i></p>
<p>Evaluate survey comments and make at least one recommendation for a modification to your Change Management Plan</p>	<p><i>The student must evaluate survey comments and make at least one recommendation for modifying the Change Management Plan. At the diploma level, student responses will vary due to their varied innovative ideas and lateral thinking skills.</i></p>

Review all evidence and mark using the assessment checklist and assessment marking criteria.

Marking criteria Part C: Prepare evaluation report and update your plan

Assessment submission checklist

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

Part C: Prepare an evaluation report and update your plan		
1.	Evaluation report	<input type="checkbox"/>
2.	Version 2 – updated action plan, communication, or training plan.	<input type="checkbox"/>

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is not yet satisfactory (NYS) and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
1.	The student submitted an evaluation report, and all fields were completed, including:	<input type="checkbox"/> S	<input type="checkbox"/> NYS

	<ul style="list-style-type: none"> • Evaluation of the effectiveness of presentation and communication to staff against communication and project objectives • Demonstrated new and innovative ideas through exploration and lateral thinking from feedback given • Evaluated presentation, how they responded to barriers to change and the strategies for embedding change • Ideas and suggestions made by staff and whether or not these will be included in the change management plan. • Evaluated survey comments and made at least one recommendation for a modification to the change management plan 		
2.	<p>The student submitted an updated plan (v2) and incorporated the following:</p> <ul style="list-style-type: none"> • Changes to the action plan, communication/training plan activities and timeframes align with project objectives, and feedback received. 	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Congratulations, you have reached the end of Assessment 2

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