

Learning Assessment Guide

Unit Standard 21336 – Version 1

Lead a group/team to achieve an objective(s) with some complexity

Level 5 – 5 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

The tasks in this assessment are designed to show your assessor that you can:

- Plan group/team activities to achieve an objective(s) with some complexity.
- Set goals and negotiate group/team process to achieve an objective(s) with some complexity.
- Facilitate group/team process to achieve an objective(s) with some complexity.
- Evaluate performance.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Observation checklist that the approved observer or assessor will use to record your performance.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

1. All activities must comply with any policies, procedures and requirements of the organisation involved the ethical codes of relevant professional bodies, and any relevant legislative and/or regulatory requirements.

For example, all employees of State sector organisations must adhere to the State Services Code of Conduct. They must also adhere to legislation relating to privacy and information.

2. The evidence assessed must be repeatable and be demonstrated in a real situation which will probably include the learner's workplace, however it can include off job situations, but the situation must be real, not simulated.
3. The objective(s) must be achievable. Credit will not be awarded if the objective(s) is/are not achieved.
 - The objective(s) must not be routine or familiar to the learner or to the group/team members. The *complexity* component of the unit standard may arise from one or more of the following:

- i. Need to use formal project management skills.
 - ii. Group/team members from different parts of the organisation.
 - iii. Variety of possible ways of achieving the objective(s), where it is not initially clear which is preferred.
 - iv. Requirement for a range of specialised skills and/or knowledge within the group/team.
 - v. Significant budget and/or financial responsibility.
4. A meeting is defined as any occasion when the group/team assembles to work toward its objective(s), and does not necessarily need to follow formal meeting procedures.

Assessment Task One – Elements 1 and 2

Introduction

Assessment task one is designed to assess your ability to plan group/team activities and to set goals and negotiate group/team processes to achieve an objective(s) with some complexity.

Instructions

- You will need to identify a situation where you are part of a group or team that has been asked to achieve an objective or a set of objectives. If it is a single objective, it is expected that there is a reasonable amount of work involved to achieve the objective, as this is a five credit unit standard.
- When you have chosen the situation, complete the Team Outcomes form below. You may give the information asked for verbally to your assessor, and they will note your answers on the form.

The Team Outcomes form asks you to identify the objective(s), outcomes, ground rules and terms of reference for the team.

The objectives must be measurable, specific and time-based.

- The terms of reference must be signed off by an authorised member of your organisation. Please ask them to sign the Team Outcomes form.
- The terms of reference and group/team ground rules must be agreed to by the group or team. Ask them to sign the appropriate section of the Team Outcome form.
- Collect all supporting documentation/information, including a meeting agenda, ensuring it is all complete and accurate and includes outcomes, venue, date, time, other members, options for consideration etc. **Hand copies of this to your assessor.**

The completed assessment for task one will include:

- The completed Team Outcomes form.
- Supporting documentation such as a meeting agenda.

Team Outcome Form
(For use by Learner)

Name of learner:	
Name of assessor:	
Date	

What are the Terms of Reference for your group/team? Terms of reference must include an achievable objective(s).
What are the expected outcomes and how are they to be documented?

What are the ground rules for the group/team?

Terms of Reference Verification – Organisation

To be completed by a representative of the organisation:

I verify that the Terms of Reference are acceptable and in line with the organisation's requirements.

Name:

Signed:

Terms of Reference and Ground Rules Verification – Group or Team

We verify that we agree with the Ground Rules and Terms of Reference for this project.

Name:

Signature:.....

Name:

Signature:.....

Name:

Signature:.....

Name:

Signature:.....

Name:

Signature:.....

Name:

Signature:.....

Name:

Signature:.....

Assessment Task Two – Element 3

Introduction

Assessment task two is designed to assess your ability to facilitate the group/team process to achieve an objective(s) with some complexity.

Instructions

- Plan group/team meetings that are planned and focused on the objectives. These meetings must be summarised and minuted in the format required by the organisations, and decisions reported in line with organisational procedure.
- During these meetings discuss strategies and agree on strategies with the group/team.
- On an ongoing basis monitor and review your group/team's progress toward the objective(s). You must consult with group/team members to ensure the right decisions are made and the terms of reference are adhered to in a way that objectives will be met.
- You will need to be observed for some of this task, ideally when you have a progress meeting with your team or group. You will need to arrange a suitable time and venue.
- Your assessor may observe you himself/herself or may arrange for a person with the appropriate experience from within your workplace to observe your performance. Agree on a suitable observer with your assessor, if your assessor suggests the delegation of this function. Agreement should be reached before approaching anyone in your workplace.
- The assessor or observer will use the accompanying 'Observation Checklist' to record your performance. You should familiarise yourself with its content so that you know what your observer is looking for. They will also ask you questions if additional evidence is required.
- The objective(s) must be achieved in accordance with organisational requirements.

The completed assessment for task two will include:

- The learner conducting progress meetings and ensuring the terms of reference is followed and objectives achieved.
- The completion of the 'Observation Checklist' by the assessor or approved observer.
- Copies of minutes and appropriate documentation.

Observation Checklist

(For use by assessor or approved observer)

Name of learner:	
Name of observer assessor:	
Date(s) and Time(s) observation took place.	

Please indicate if the learner has met the criteria during the process of achieving the objectives. Use the space to add comment for feedback to the learner and for moderation purposes.

Observed that the learner:	Observer comments	Yes / No
Progress towards objectives is monitored and reviewed. This is done in consultation with other team members.		
Learner ensures group/team make the right decisions in order to meet the objective.		
Learner discusses and agrees on strategies to achieve the objectives with group/team members.		
Learner plans group/team meetings which focus on the objectives and are summarised and recorded appropriately.		
Decisions are reported in accordance with organisational requirements		
Objective(s) are met.		
Supporting evidence attached.		

Additional Notes:

Assessor / Observer:

Signature:

Date of observation:

Assessment Task Three – Element 4

Introduction

Assessment task three is designed to assess your ability to evaluate your performance planning and facilitating a team or group in order to meet an objective(s) with some complexity.

Instructions

- Organise a follow-up meeting with the group and team. Evaluate the process in terms of the achievement of the objective. Ensure this meeting is minuted.
- Evaluate your own performance including a reflective-self-evaluation.
- **Type a brief report** of your evaluation of your own performance in terms of the following:
 - Progress towards the group/team's achievement of the objective(s)
 - Group/team ground rules.
 - Practices and/or ideas that could be transferred to other groups or teams.

Your assessor may discuss your report and the meeting minutes if clarification or further evidence is required.

The completed assessment for task three will include:

- Written record of the follow-up meeting.
- Self-evaluation report.
- Assessor's notes where applicable.

Assessment Guide

These are the evidence and judgements that your assessor will use to assess your competence in unit standard 21336.

Task / Element	Evidence required	Judgement
<p><i>Task 1 / Element 1</i></p> <p>The learner is required to plan group/team activities to achieve an objective(s) with some complexity.</p>	<p>Team Outcome Form</p> <p>Agendas and supporting documentation.</p> <p>Supporting documentation is any documented information that gives background information and/or sets out options and criteria for consideration.</p>	<p>The group/team outcomes are clearly defined. They must be concise and documented in an agreed format. The objective(s) must be complex.</p> <p>Yes / No</p> <p>The meeting agenda and other supporting information must be complete and accurate. The group/team's objective, venue, date, time and other members must be included.</p> <p>Yes / No</p>
<p><i>Task 1 / Element 2</i></p> <p>The learner is required to set goals and negotiate group/team processes to achieve the objective(s) with some complexity.</p>	<p>Signed Team Outcome Form.</p>	<p>Learner obtains agreement to the terms of reference from the organisation and members of the team/group.</p> <p>Yes / No</p> <p>Agreement is reached on ground-rules for the group/team members' behaviour.</p> <p>Yes / No</p> <p>The terms of reference include achievable objectives that are specific, measurable and time-based. The objective(s) must be complex (refer special notes).</p> <p>Yes / No</p>
<p><i>Task 2 / Element 3</i></p> <p>The learner is required to facilitate the group/team process to achieve the objective(s) with some complexity.</p>	<p>Observation Form.</p> <p>Minutes and other supporting documentation.</p>	<p>Learner reviews and monitors progress towards the objectives in consultation with the team members to ensure decisions are made and objectives are met.</p> <p>Yes / No</p> <p>Learner discusses and agrees on strategies to achieve the objectives.</p> <p>Yes / No</p> <p>Learner ensures group/team meetings are well planned, and focus on objective(s). The meetings must be summarised and recorded, and decisions reported in accordance with organisational requirements.</p> <p>Yes / No</p>

Task / Element	Evidence required	Judgement	
<p><i>Task 3 / Element 4</i></p> <p>The learner must evaluate the performance of themselves and the group/team.</p>	Minutes of evaluation meeting.	The group/team meet to evaluate their performance in terms of meeting the objective(s).	Yes / No
	Learner's self-evaluation.	The learner evaluates their own performance in terms of the progress of the group/team towards meeting the objective(s) and in terms of the group/team keeping to the ground rules.	Yes / No
	Assessor's notes where required.	The learner's evaluation also includes any practices and/or ideas that could be transferred to other groups/teams.	Yes / No