

# Learning Assessment Guide

## Unit Standard 25463 – Version 1

### Manage a plan to achieve organisational objectives

#### Level 5 – 10 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:

- Set, agree and update objectives for the work team.
- Develop a plan to achieve the objectives.
- Source, allocate and adjust resources to achieve the objectives.
- Monitor and evaluate the effectiveness of the plan in achieving objectives.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Manager or Team Leader Verification form.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

The following are relevant to this unit standard:

- Employment Relations Act
- Health and Safety in Employment Act
- Human Rights Act
- Privacy Act
- Resource Management Act
- Applicable bylaws, acts and statutes
- Organisational policies and procedures

*Organisation* – a specific profit or non-profit business entity eg business unit, iwi, entire organisation

*Objectives* – The defined expectations for a work team

*Work Team* – Can be temporary or on-going. Its members must be working together to meet a defined objective.

## Assessment Task One – Element 1

### Introduction

The purpose of this task is to assess your ability to set, agree and update objectives for the work team.

### Instructions

Please note that all tasks in this assessment refer to one set of objectives and plan. Be prepared to discuss any aspects of your objectives and plan with your assessor.

1. Provide a set of objectives you set, agreed and updated for your work team. These objectives should be no more than 2 years old.

The objectives must:

- have been developed after consultation with stakeholders
- align with the organisational plans such as operational, business and/or strategic plans
- be clear and within your area of responsibility
- include measures of performance, actions, time frames.

Provide a description of how your objectives demonstrate the above points and copies of any relevant documentation.

2. Describe how your consultation process was timely and ensured quality participation from those involved. Provide any available documentation as evidence.

3. Describe how you updated the objectives to reflect changes to individual or team responsibility or to the organisation. Provide any available documentation as evidence.

## **Assessment Task Two – Element 2**

### **Introduction**

The purpose of this task is to assess your ability to develop a plan to achieve the objectives.

A plan includes but is not limited to work methods, milestone outcomes.

### **Instructions**

1. Provide a plan to achieve the objectives set in Task One.

The plan must:

- be clear, concise and agreed
- include performance standards for meeting the objectives
- be complete, comply with relevant legislation and meet with organisational policies, procedures and client needs
- identify risks that may impact on the achievement of the objectives and identify contingencies for dealing with them
- make use of available resources (resources may include human, physical or financial).

Provide a description of how your plan demonstrates the above points and copies of any relevant documentation.

2. Describe how you consulted with stakeholders, and that you have the authority to make the required decisions. Provide any available documentation as evidence.

## **Assessment Task Three - Element 3**

### **Introduction**

The purpose of this task is to assess your ability to source, allocate and adjust resources to achieve the objectives.

Resources include human, physical and financial.

### **Instructions**

1. Provide evidence that shows how you sourced, allocated and adjusted resources to achieve the objectives.
  
2. Describe how you ensured that:
  - resources required to achieve the objectives were organised and available for use in accordance with plans (such as operational, business or strategic plans) and organisational requirements
  - resources plans were adjusted as required to meet unplanned or unscheduled events.

Provide any available documentation as evidence.

## Assessment Task Four – Element 4

### Introduction

The purpose of this task is to assess your ability to monitor and evaluate the effectiveness of the plan in achieving the objectives.

### Instructions

1. Provide evidence that shows how you monitored and evaluated the effectiveness of your plan in achieving the objectives.
  
2. Describe how you:
  - monitored work plans in accordance with organisational requirements
  - recorded the current status of objectives in a format that meets organisational requirements
  - assessed opportunities for improvement for feasibility in consultation with appropriate people
  - implemented any changes to work plans in the required timeframe and format
  - communicated evaluation results and changes in accordance with organisational requirements and procedures.

Provide any available documentation as evidence.

## **Assessment Task Five – Elements 1 to 4**

### **Introduction**

The purpose of this task is to assess your ability to:

- set, agree, and update objectives for the work team
- develop a plan to achieve the objectives
- source allocate and adjust resources to achieve the objectives
- monitor and evaluate the effectiveness of the plan in achieving the objectives.

### **Instructions**

Ask your manager to complete attached Manager Verification Form. List any documentation provided for previous tasks on the front page of the form.

### Manager or Team Leader Verification Form

<b>Name of Learner:</b>		
<b>Name of Verifier:</b>		<b>Phone:</b>
<b>Relationship to Learner:</b>		

\_\_\_\_\_ is currently being assessed toward Unit Standard 25463 Manage a plan to achieve organisational objectives.

#### Document list

Using the table below, please confirm that the learner has met organisational requirements in relation to the objectives and plan described in the listed documents.

**Setting, agreeing and updating objectives for the work team**

- Learner consulted with stakeholders when developing objectives for their work team.
- Objectives are aligned with organisational plans.
- Objectives are within the learner's area of responsibility.
- Learner managed the consultation process in a timely manner and secured quality input and participation from participants.

Comments

**Developing a plan to meet objectives**

- Learner consulted with stakeholders when developing objectives for their work team.
- Objectives are aligned with organisational plans.
- Objectives are within the learner's area of responsibility.
- Learner managed the consultation process in a timely manner and secured quality input and participation from participants.

Comments

**Sourcing, allocating and adjusting resources to meet objectives**

- Learner ensured all required resources (human, physical, financial) were available.
- Learner adjusted resource requirements when unexpected events occurred.

Comments

**Monitoring and evaluating the effectiveness of the plan in achieving the objectives**

- Learner monitored implemented work plans.
- Learner recorded current status of work plan progress in the correct format.
- Learner evaluated work plans and consulted with relevant stakeholders when assessing opportunities for improvement.
- Any changes to work plans were implemented in the required time frame.
- Results of work plan evaluation and changes to plans were communicated to stakeholders in accordance with organisational procedures.

Comments

Please also confirm that the learner demonstrates the above on an ongoing basis on the workplace.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

The assessor may contact you to discuss the learner's performance.

Thank you for your assistance.

## Assessment Guide

---

This is the assessment guide you will use to assess learner competence in unit standard 25463.

Element	Task	Evidence required	Judgement
One Set, agree, and update objectives for the work team	One, Five	Team objectives and associated documentation  Completed Manager Verification Form	Team objectives, associated documentation and Manager Verification Form demonstrate the ability to set, agree, and update objectives for the work team.  Objectives must: <ul style="list-style-type: none"> <li>• have been developed after consultation with stakeholders</li> <li>• align with the organisational plans such as operational, business and/or strategic plans</li> <li>• be clear and within your area of responsibility</li> <li>• include measures of performance, actions, time frames</li> <li>• be updated where required to reflect organisational change and changes to areas of responsibility</li> </ul> Consultation processes must be timely and secure quality input and participation from people involved.
Two Develop a plan to achieve the objectives	Two, Five	A plan to achieve team objectives and associated documentation  Completed Manager Verification Form	Plan, associated documentation and Manager Verification Form must demonstrate the ability to develop a plan to achieve the objectives.  Plans should: <ul style="list-style-type: none"> <li>• include work methods and milestone outcomes</li> <li>• have been developed in consultation with stakeholders, with the</li> <li>• authority to make</li> </ul>

Element	Task	Evidence required	Judgement
			<p>decisions established</p> <ul style="list-style-type: none"> <li>• meet the requirements of the organisation</li> <li>• be clear, concise and includes agreed performance standards</li> <li>• comply with legislation and organisational policy and procedures</li> <li>• meet the needs of the client</li> <li>• identifies potential risks and includes contingencies for dealing with risks</li> <li>• make effective use of available resources.</li> </ul>
<p>Three Source, allocate and adjust resources to achieve objectives</p>	<p>Three, Five</p>	<p>Documentary evidence of having sourced, allocated and adjusted resources to achieve objectives</p> <p>Completed Manager Verification Form</p>	<p>Documentary evidence and Manager Verification Form must demonstrate the ability to source, allocate and adjust resources to achieve objectives.</p> <p>This includes ensuring that:</p> <ul style="list-style-type: none"> <li>• resources required to achieve the objectives were organised and available for use in accordance with plans (such as operational, business or strategic plans) and organisational requirements</li> <li>• resources plans were adjusted as required to meet unplanned or unscheduled events.</li> </ul>
<p>Four Monitor and evaluate the effectiveness of the plan in achieving objectives</p>	<p>Four, Five</p>	<p>Documentary evidence of having monitored and evaluated the effectiveness of the plan in achieving objectives</p> <p>Completed Manager Verification Form</p>	<p>Documentary evidence and Manager Verification Form must demonstrate the ability to monitor and evaluate the effectiveness of the plan in achieving objectives.</p> <p>This includes:</p> <ul style="list-style-type: none"> <li>• recording the current status of objectives in a format that meets organisational requirements</li> </ul>

Element	Task	Evidence required	Judgement
			<ul style="list-style-type: none"> <li>• assessing opportunities for improvement for feasibility in consultation with appropriate people</li> <li>• implementing any changes to work plans in the required timeframe and format</li> <li>• recorded the current status of objectives in a format that meets organisational requirements</li> <li>• assessed opportunities for improvement for feasibility in consultation with appropriate people</li> <li>• implemented any changes to work plans in the required timeframe and format</li> <li>• communicated evaluation results and changes in accordance with organisational requirements and procedures</li> <li>• communicating evaluation results and changes in accordance with organisational requirements and procedures.</li> </ul>