

Learning Assessment Guide

Unit Standard 9679 – Version 4

Participate in a formal meeting

Level 4 – 4 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:

- Demonstrate knowledge of formal meetings and their procedures
- Prepare for a formal meeting
- Contribute to a formal meeting

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Verification form.
- Observation checklist.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

1. A formal meeting is one where there is a recognised and established set of guidelines that govern the meeting. Such guidelines are often written, and may include organisational requirements, a club or incorporated society constitution, etc. Such guidelines usually cover such matters as:
frequency of meeting, notice of meeting and agenda, venue, etc
conduct of the meeting, including discussion and decision-making processes, quorum, etc
reporting requirements after the meeting.

Such guidelines set the customary procedures for meetings.

2. People may be assessed against this unit standard in simulated conditions which relate as closely as possible to a situation relevant to the person being assessed, or in a real-life context using naturally occurring evidence.

- 6.
- a. There are a number of different ways in which people participate in a meeting. Give brief description of three of the following styles and state what influence this might have on the meeting progress and / or outcome.

Style	Description of style and how it will influence the meeting progress and / or outcome
Compromiser	
Harmoniser	
Tension reliever	
Gatekeeper	
Social Supporter	

- b. What is your own preferred participation style?

7. What is the purpose of the following post-meeting procedures?

- a. Minutes

- b. Follow-up

The completed assessment for task one will include:

All questions completed.

Assessment Task Two – Element 2

Introduction

Assessment task two is designed to assess your ability to prepare for a formal meeting.

Instructions

In this task you need to identify a formal meeting that requires that you make preparations prior to the meeting. For example you may have been asked to complete a report or collect some data or perhaps analyse some information before the meeting.

Before attending the meeting answer the following questions.

1. What is the purpose of the meeting?
2. What issues might arise in the meeting?
3. What contributions are you likely to make to the meeting?
4. How are you going to deal with issues that may arise in the meeting?

You will need to provide your assessor with copies of the meeting agenda and any other documentation that demonstrates that your preparation is intended to meet the objectives of the meeting. This may include activities such as evaluating ideas, gathering data, researching information and preparing reports.

The completed assessment for task two will include:

- Answers to questions 1-4
- Documentation such as meeting agendas, minutes, data collection, reports or similar.

Assessment Task Three – Element 3

Introduction

Assessment task three is designed to assess your contribution to a formal meeting.

Instructions

In this task you need to demonstrate that your contributions to the group meeting are relevant and focused on the matters under discussion such as specific agenda items or proposed motions.

Before the meeting

You will need to arrange for your assessor or an approved observer to observe you during the meeting. Give the assessor a copy of the meeting agenda prior to the meeting. They will record their observations on the Observation Checklist. Make sure that you read through the Observation Checklist so that you are familiar with what the assessor will be looking for.

During the meeting

During the meeting the contributions that you make should be made on the basis of available data that you have either researched or have gained in the course of the meeting. Your contributions may include ideas, information, opinion, recommendations, and clarifying questions.

The language that you use during the meeting should be appropriate for the situation. It should reflect the tone of the matters under discussion; the formality of the relationship between members of the group and yourself; and the protocols of the meeting.

After the meeting

You will need to demonstrate your commitment to the meeting outcomes. This might be through complying with the decisions of the meeting, working within agreed guidelines for the group, sharing responsibility for the resolution of issues.

You must also obtain verification of your consistent participation in formal meetings from someone who has had the opportunity to observe you on a number of occasions. This is likely to be another member of the group that regularly meets. Use the Group Member Verification Form to collect this information.

The completed assessment for task three will include:

- Verification from a member of the group.
- Completed Observation Checklist.

Observation Checklist

The assessor should use the 'Comments' space wherever possible to list what they observed that met this requirement.

Observation	Comments	Yes/ No
Contributions made are relevant to, and focused on, the meeting objectives. Any two from: <ul style="list-style-type: none">• Ideas• Information• Opinions• Recommendations• Clarifying questions		
Contributions to the meeting are appropriate in terms of: <ul style="list-style-type: none">• Culture• Language• Behaviour		
Commitment to meeting outcomes is demonstrated. This may be by: <ul style="list-style-type: none">• Complying with meeting decisions• Sharing responsibility for the resolution of outstanding issues.		
All contributions to the meeting comply with customary procedures.		

Assessor / Approved Observer Signature:

Date:

Group Member Verification Form

_____ (name of learner) is currently being assessed for unit standard 9679 *Participate in formal meetings*.

Your knowledge of the learner's participation in formal meetings in the workplace is sought to confirm that:

- The learner prepares adequately for meetings by being aware of the agenda, completes allocated tasks prior to the meeting and brings relevant information and data to the meeting.
- The learner demonstrates constructive strategies of dealing with issues that arise during the meeting.
- The learner uses appropriate language during meetings.
- The learner makes contributions during the meeting that are relevant, focused, or supported by appropriate data.
- The learner demonstrates commitment to the purpose and decisions of the meeting.

Comments:

Signed: _____ Date: _____

Position: _____

Contact telephone number: _____

Note: your signature on this verification form will be accepted as confirmation that the learner meets the above requirements unless you indicate otherwise.

Thank you for your assistance.

Assessment Guide

The following will be used to assess your competence for unit standard 9679.

Element	Evidence required	Judgement
<p><i>Task 1 / Element 1</i></p> <p>Demonstrate knowledge of formal meetings and their procedures.</p>	<p>All questions answered.</p>	<p>Answers given align with model answers.</p>
<p><i>Task 2 / Element 2</i></p> <p>Prepare for a formal meeting.</p>	<p>All questions answered.</p> <p>Documentation such as meeting agendas, minutes, data collection, reports or similar.</p>	<p>Answers given align with model answers.</p> <p>Documentation supplied demonstrates that preparation is intended to meet the objectives of the meeting.</p>
<p><i>Task 3 / Element 3</i></p> <p>Contribute to a formal meeting.</p>	<p>Completed verification from a member of the group.</p> <p>Completed Observation Checklist.</p>	<p>Verification form and observer checklist indicate that all requirements have been met.</p>