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| **Instructions to assessors** |
| This assessment kits consists of the following   * **Evidence Review** * **Competency Interview** * **Observation/Demonstration Checklist (optional)** * **Competency Interview Record**   **Instructions:**  Assessor checks the portfolio to confirm that:   * + the portfolio is well-organised. The assessor may return a poorly organised portfolio to the candidate for improvement before proceeding.   Assessor reviews the evidence   * The assessor reviews the evidence and notes the quality of evidence provided for each unit. * The assessor uses the evidence review table and maps the evidence to the criteria of the unit. * The assessor identifies any gaps and may contact the candidate to organise a ‘competency conversation’—i.e., a RPL assessment interview (in this case, the RPL assessor may choose to gather some of the required knowledge evidence, verbally; the RPL assessor must detail answers to questions for verbal evidence provided). * On completion of the competency interview, the assessor maps the student responses to the relevant items in the Evidence Review table, i.e., Performance Criteria and Knowledge Evidence. * Contact one or more of the third party referees the candidate names in their portfolio—the RPL assessor should only do this if they have questions about the evidence the candidate has submitted and feels that the referee can clarify. * Contact the candidate and ask them for more evidence.   Assessor makes assessment decision   * The assessor makes a decision of competence for each unit applied for. * The assessor informs the candidate of the outcome. |

**RPL Assessment Kit**

**– BSBPEF202 Plan and apply time management**

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| **Name of Candidate** | | Chris Brown | | | | |
| **Unit Code and Title** | | BSBPEF202 Plan and apply time management | | | | |
| **Name of Assessor** | | <enter your name> | | | | |
| **UPON RPL INQUIRY OR APPLICATION, WAS THE CANDIDATE?** | | | | | | **Check** |
| Issued the relevant documents including: Application form, RPL Handbook, refund policy? | | | | | |  |
| Provided with a copy of the unit(s) of competency and had it explained? | | | | | |  |
| Given guidance on the types and examples of evidence that relate to the unit(s)? | | | | | |  |
| **Method of Submission** | | Mail  Email | In person  Courier | Dropbox/Drive  Other | **Due Date** | <date> |
| **Submitted Date** | <date> |
| **Portfolio of Evidence Submitted** | | | | | | |
| **Item #** | **Item Description** | | | | | |
| 1 | Annual Performance Appraisal | | | | | |
| 2 | Emails - Colleagues | | | | | |
| 3 | Emails - Supervisor | | | | | |
| 4 | Outlook Calendar | | | | | |
| 5 | Position Description | | | | | |
| 6 | Resume | | | | | |
| 7 | Statement of Attainment | | | | | |
| 8 | Testimonial | | | | | |
| 9 | To Do list | | | | | |
| 10 | Weekly Administration Schedule | | | | | |
| 11 | Reference – P&C Association | | | | | |
| 12 |  | | | | | |

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| **Unit code and title**  **EVIDENCE REVIEW**  **BSBPEF202 Plan and apply time management** | | **Evidence Item #’s** | **Check if fully addressed** |
| **Element** |  | | |
| 1 Organise work schedule | 1.1 Discuss and agree on work goals and plans with assistance from appropriate personnel |  |  |
| 1.2 Identify relationship between own work goals and plans, and organisational goals and plans |  |  |
| 1.3 Research time management techniques and strategies |  |  |
| 1.4 Plan and prioritise work tasks within allocated timeframes |  |  |
| 2 Complete work tasks | 2.1 Perform tasks according to designated timelines and instructions |  |  |
| 2.2 Seek assistance from colleagues when difficulties arise in achieving allocated tasks |  |  |
| 2.3 Identify factors affecting work plan |  |  |
| 2.4 Communicate progress on work plan to relevant personnel according to organisational policies and procedures |  |  |
| 3 Review work performance | 3.1 Seek feedback on time management from relevant personnel |  |  |
| 3.2 Record changes to time management approach according to task instructions |  |  |
| 3.3 Identify and plan opportunities for improvement in discussion with colleagues |  |  |
| Performance Evidence – has the student provided evidence of his/her ability to: | * develop and implement at least one time management plan with support of relevant personnel. |  |  |
| In the course of the above, the candidate must: |  |  |
| * complete each work task within specified timeframe, seeking opportunities to use digital tools where applicable |  |  |
| * seek and use feedback from others to monitor and improve work performance. |  |  |
| Knowledge Evidence  – can the student demonstrate knowledge to complete tasks: | demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of: |  |  |
| * time management techniques and strategies |  |  |
| * features of a time management plan |  |  |
| * organisational standards, policies, and procedures relevant to own work role |  |  |
| * relationship between own work goals and plans and organisation’s goals and plans |  |  |
| * factors affecting work progress and performance improvement techniques. |  |  |
| **Foundation Skills -** *This section describes those language, literacy, numeracy, and employment skills that are essential to performance but not explicit in the performance criteria.*  Foundation skills are an integral part of a unit of competency and must be assessed. A unit’s performance criteria can explicitly include foundation skills essential for performance. Alternatively, if foundation skills are not explicit in the performance criteria they must be described in the ‘foundation skills’ field of the unit of competency. (ASQA VAC 7.4) | | | |
| **Reading** | * Identifies and interprets textual information to determine and adhere to organisational and task requirements |  |  |
| **Writing** | * Completes required documents using organisational formats |  |  |
| **Oral communication** | * Uses listening and questioning techniques to seek information and confirm understanding * Participates in verbal interactions using language and features suitable to audience and context |  |  |
| **Numeracy** | * Interprets numerical information related to timeframes |  |  |
| **Enterprise and initiative** | * Complies with organisational policies, procedures, and standards |  |  |
| **Planning and organising** | * Prioritises work and completes activities within designated timeframes * Identifies and solves routine problems |  |  |
| **Technology** | * Selects and uses appropriate digital tools to complete tasks |  |  |

The assessor must provide the following information during the competency interview and complete the checklist below.

**Competency Interview Record**

|  |  |  |  |  |  |  |  |
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| 1. **TASK SUMMARY:** Identify at least 6 appropriate questions to ask the candidate to clarify their’ knowledge of the unit of competency **BSBPEF202 Plan and apply time management** 2. The questions are to be asked by the assessor to the candidate during a real or mock competency interview. You will conduct this interview making sure that you take care of the introductions and provide the information as part of this. 3. **WHAT NEEDS TO BE KEPT FOR EVIDENCE?** 4. The assessor is to record the candidate’s responses and any extra questions asked to fill in gaps in the evidence supplied towards the performance and knowledge evidence criteria of the unit. All fully completed documents need to be submitted. 5. **SUPPORT** 6. The assessor can guide the candidate as needed to ensure a fair opportunity has been given to demonstrate competency.   The assessor must identify any reasonable adjustment needed and provide details in the appropriate section/s | | | | | | | |
| **WELCOME AND GENERAL INFORMATION** | | | | | | **Check if covered** | |
| Welcome the candidate, introduce yourself and make the candidate comfortable | | | | | |  | |
| Explain what you will be doing during the interview, e.g., asking questions, taking notes, recording the session | | | | | |  | |
| Explain “Competent” and “Not Yet Competent” outcomes and how these are determined | | | | | |  | |
| Explain how feedback and outcomes will be communicated to the candidate | | | | | |  | |
| Explain the appeals process | | | | | |  | |
| Ask if the candidate has any special needs and if they are ready to proceed | | | | | |  | |
| **ASSESSOR NOTES, COMMENTS AND FEEDBACK**  (Information provided or discussed, including a summary of candidate responses to questions and any further evidence provided, such as demonstrations, products etc.) | | | | | | | |
| **#** | **QUESTION** | | **CANDIDATE RESPONSE** | | | | **Check if satisfactory** |
| Q1 | Can you tell me what time management strategies you use and how you plan your day in your job role? | |  | | | |  |
| Q2 | What are the key features of your time management planner you use and have you had any challenges with this. If so what did you do? | |  | | | |  |
| Q3 | What policies and workplace procedures have you had to implement in your job role? | |  | | | |  |
| Q4 | How do you or did you agree on your personal goals and work goals? Have you had a time when they didn’t align with the company goals, and if so, what did you do? | |  | | | |  |
| Q5 | Has there been a time when factors affected your ability to get work done, if so, how did you manage these factors? | |  | | | |  |
| Q6 | What professional activities do you have planned? | |  | | | |  |
| **Comments:** | | | | | | | |
| **Reasonable adjustments** | | | | | | | |
| **Interview date:** | |  | | **Time interview took to complete:** |  | | |

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| **ASSESSMENT OUTCOMES** | |
| **Additional evidence required: Yes  No  (list additional evidence)** | Method of submission |
| Mail  Email  In person  Dropbox  Courier  Other |
| **Date required by (if YES):** | |

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| **Rules of Evidence** | | | |
| **Is the evidence provided:** | **YES** | **NO** | **Explain why you have selected YES or NO** |
| **VALID?** |  |  |  |
| **AUTHENTIC?** |  |  |  |
| **CURRENT?** |  |  |  |
| **SUFFICIENT?** |  |  |  |

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| **Attempt 1** | | |
| **COMPETENT - RPL Granted**  **NOT YET COMPETENT**  **- Additional Evidence Required** | **Assessor Signature** |  |
| **Date** |  |

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| **Attempt 2** | | |
| **COMPETENT - RPL Granted**  **NOT YET COMPETENT**  **- Additional Evidence Required** | **Assessor Signature** |  |
| **Date** |  |

## OBSERVATION/DEMONSTRATION CHECKLIST (optional)

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| --- | --- | --- | --- | --- |
| 1. **TASK SUMMARY: (optional)** 2. **Demonstration Task** Describe the task here   **Assessor Instructions:**  This checklist below is to be used by the assessor to record observations of the candidate performing the required task(s) for the unit **BSBPEF202 Plan and apply time management**  If the candidate did not demonstrate the required skills, the assessor may pose questions or hypothetical situations based on the knowledge of their work environment and/or the unit requirements.  If evidence presented by the candidate is sufficient some aspects may not need to be demonstrated and should be ticked N/A | | | | |
| **Did the candidate:** | **Yes** | **No** | **N/A** | **Comments** |
| 1. INSERT OBSERVATION ITEM |  |  |  |  |
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| **Reasonable adjustments (leave blank if none)** | | | | |