# Trainee Assessment

## Team leadership

<table>
<thead>
<tr>
<th>Unit standard</th>
<th>Version</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>21335 Lead a team to achieve an objective</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**Your name:**

**Your workplace:**

**Your date of birth:**

**NSN number (if you know it):**

**Declaration**

I was told about and understand the assessment requirements and appeals process.

I have prepared my answers myself.

Any evidence I have provided as my own, I produced myself.

I understand that this assessment may be used for moderation and quality control purposes.

I understand that when I achieve this unit standard my result will be registered with the New Zealand Qualifications Authority.

I confirm the above declaration:  Yes [ ]  No [ ]  Date:
Assessment summary (completed by assessor)

Trainee's performance summary

<table>
<thead>
<tr>
<th>Assessment tasks</th>
<th>Assessor signature</th>
<th>Date achieved</th>
</tr>
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<tr>
<td>Task 1: Plan team activities</td>
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<td>Task 2: Lead a team to achieve an objective</td>
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<tr>
<td>Task 3: Evaluate performance</td>
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Unit standard results

I have assessed the trainee and confirm the requirements have been met to demonstrate competency in:

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<td>3</td>
<td>4</td>
<td>5</td>
<td>✅</td>
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</tbody>
</table>

Assessor name:  
Signature:  
Assessor number:  
Date:
Trainee information

Before you start

- The assessor/observer will talk about what you need to do.
- You may have been observed doing some of these tasks already, or there may be workplace documents you have completed, such as a workplace incident report, which documents what you have done at work.
- You may bring evidence of what you have done already, such as your induction training log, or proof of competency from a course you have completed, eg a marked assessment or project. This may be recorded as evidence.
- You need to provide a collection of evidence from your workplace to show you led a team of people to achieve an objective. You may provide a case study as evidence.

As you go

- Follow instructions for each task.
- For knowledge assessment questions you can choose to write your answers or your assessor may record your verbal answers for you.
- Your assessor or observer will complete the observation form in this assessment when they observe your work. Sometimes they may ask you to do a specific task or ask a question about what you are doing.
- If you need help with this assessment, please contact your assessor.

When you finish

- Make sure you have completed any parts where the assessor/observer has said you need more work.

Assessment summary

This assessment requires you to lead a team of at least three people to achieve an objective. The objective must be achieved for you to obtain credit for this unit standard.

You can choose a team you are leading now or from when you were leading a team in the last 12 months. All your answers must be based on you actively leading the team, facilitating the processes to achieve the team objective.

The team’s objective may require working together face-to-face on a task or it may be able to be achieved by working remotely by Skype meetings or by working online.

Meeting thus refers to any occasion when the team ‘meets’ to work toward an objective. This does not have to be a physical meeting and does not require formal meeting procedures.

Collect evidence from leading your team and use it as evidence for this assessment. You may use a case study from your workplace as evidence for this unit standard.
Appeals

If you wish to appeal against the assessment result or process, talk to your assessor. If you are still not satisfied, you can appeal to Careerforce by completing the assessment result appeal form that can be found online at www.careerforce.org.nz/contact/forms

Feedback

Careerforce regularly reviews our assessment and learning resources. As a user, we would appreciate feedback on how you found it. Feedback can be provided to Careerforce via:

- our online feedback form at www.careerforce.org.nz/contact/resource-assessment-feedback
- email to info@careerforce.org.nz
Task 1: Plan team activities

For this task, you need to document how you planned and prepared to achieve an objective with a team of at least three people.

The team’s objective may require working together face-to-face on a task OR it may be able to be achieved by working remotely by Skype meetings OR by working online, such as creating an entry on Facebook and ‘liking’ it and reposting it.

Before the team first meets together, collect together any supporting information, such as background documents, criteria and options for the task to be achieved, and an agenda for your meeting.

The agenda should include the date, time and venue for the meeting, the expected length of the meeting, who will attend, and the topics that will be covered. This does not have to be a formal meeting or follow strict meeting procedures. It does not have to be a physical meeting with the team all in one place, if you are working remotely or online.

It’s unlikely that your observer or assessor will have the opportunity to directly observe your work with the team, so you will need to provide a collection of evidence to show what you have done working with the team.

You need to answer the questions following, either by writing in the space or by attaching a case study from your workplace which covers the information from the questions below.

1 Briefly describe the team and any important issues about the team or the people.

2 State the objective for the team. It must be clear and concise.
   Usually objectives are SMART – specific, measurable, achievable, results-oriented and have a timeframe. The objective must be achieved for successful completion of this unit standard.
3 You need to provide a collection of evidence to show what you have done when working with the team.

Examples of evidence, which can be copies or scans, can include:

- meeting agenda, with evidence that you are the organiser.
- team meeting minutes.
- emails, messages, texts or similar calling the meeting.
- the objective to be achieved.
- criteria and options for achieving the objective.
- supporting background information provided for the team.

Collect together your evidence in a logical order. Make a list of the documents provided, along with a summary of the main points.

You must keep hard copies and/or electronic copies of your workplace evidence for a period of at least 12 months after the date of this assessment as they may be requested for moderation.

**Task 1: Assessor feedback to trainee**

When the assessor agrees you have completed this task successfully, they will sign it off on the assessment summary page at the front of this assessment.
Task 2: Lead a team to achieve an objective

For this task, you need to lead a team to agree on team processes and ways to achieve the objective. You and your team must then achieve the objective.

You can answer the questions below or you can attach a case study to provide the same information.

A  You must work with your team to obtain agreement on what they must do. The team must:

- agree on terms of reference and ground rules.
- establish tasks, roles, responsibilities and/or accountabilities for all team members.
- agree upon activities and strategies to achieve their objective.

B  You must facilitate team processes, including:

- monitoring and reviewing progress towards the objective with the team.
- keeping the team focussed on the objective.
- planning, summarising and reporting meetings.

Remember to collect evidence to show this happening. You must show that team members were involved with and agreed to these team processes. You can include evidence from team members using the form in Task 3.

1  State the terms of reference and ground rules for achieving the objective that the team agreed upon.
   These must be acceptable to your organisation.

2  State the tasks, roles, responsibilities and/or accountabilities of the team members.
   Make sure you describe your role and responsibilities as the team leader.
3 What activities did the team decide and agree upon to achieve their objective?

The activities must be SMART – specific, measurable, achievable, results-oriented, and have an agreed time frame.

4 What strategies did the team discuss and agree upon to achieve the objective?

5 How did you and the team monitor and review progress towards achievement of the objective?

6 How did you make sure that team meetings focused on the objective?
7 Describe how team meetings are planned, summarised and reported, according to your organisation’s requirements.

Task 2: Assessor feedback to trainee

When the assessor agrees you have completed this task successfully, they will sign it off on the assessment summary page at the front of this assessment.
Task 3: Evaluate performance

For this task, you need to evaluate performance. The objective must have been achieved.

You must evaluate your own performance in leading your team to achieve the objective.

You must provide signed evidence from three team members showing that they were involved in and agreed to the team processes. You may use the team members form provided with this assessment. This form also asks the team member for feedback for you, the team leader.

You can answer the questions below or you can attach a case study to provide the same information.

1. Provide evidence that the objective was achieved.
   This could be meeting minutes, other documents, online material, items produced, photographs of the task or any other evidence. Please specify here what the evidence is and attach it or provide a link to online evidence.

2. What feedback did your team give you on achieving this team objective?

3. How did you evaluate your own performance as a leader?
4 Reflecting upon your own performance, what have you learned from this experience that you can use again in other situations where you are leading a team?

5 Ask your observer to complete the **team outcome form** to confirm that the information you provided is correct and that you followed your organisation’s policies and procedures.

An observer is someone who understands the assessment, works closely with you and can confirm that you have performed the tasks to the standard required. Your assessor may contact your observer to discuss their comments.

Read the form to you make sure you cover all requirements.

6 Ask at least three team members to each complete a **team member form** showing their involvement and give feedback.
**Team outcome**

**Note to observer:**
You have been asked to complete this form. You need to be confident that the information the trainee has provided is correct, especially if you did not personally witness the team in all their meetings and/or activities.

If you agree that the trainee meets these standards please tick the boxes below. Please comment on the trainee’s performance. The assessor may wish to contact you to discuss this team outcome form.

**I confirm that the information the trainee has provided is correct and follows the organisation’s policies and procedures.**

<table>
<thead>
<tr>
<th>Please tick if you agree</th>
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<tbody>
<tr>
<td>☐</td>
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</tbody>
</table>

- Does the evidence accurately represent a real workplace or simulated workplace situation the trainee was involved in?
  - ☐

- Were there at least three people in the team?
  - ☐

- Were the terms of reference and ground-rules appropriate for the organisation?
  - ☐

- Did the trainee facilitate a team process to lead the team to achieve an objective?
  - ☐

- Was the objective achieved?
  - ☐

- Were meetings reported according to the organisation’s requirements?
  - ☐

- Did the actions taken by the trainee meet the requirements of their organisation’s policies and procedures, and any relevant statutory and regulatory requirements?
  - ☐

Please comment:

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**Observer name:**

**Designation:**

**Signature:**

**Date:**

**Contact details (phone/email):**
At least **three** team members must each record what happened. This form may be used.

### Team Member form

**Note to team member:**
You have been asked to complete this form about working as a member of a team.

<table>
<thead>
<tr>
<th><strong>Please tick if you agree</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I was clear as to what my role and responsibilities within the team were.</td>
<td>☐</td>
</tr>
<tr>
<td>I agreed with the terms of reference and ground-rules that the team developed.</td>
<td>☐</td>
</tr>
<tr>
<td>I agreed with the activities and strategies required to achieve the objective, as discussed and agreed by the team.</td>
<td>☐</td>
</tr>
<tr>
<td>The team leader involved me in the process of our team achieving the objective.</td>
<td>☐</td>
</tr>
<tr>
<td>The team leader involved me in monitoring and reviewing progress towards the objective.</td>
<td>☐</td>
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Briefly describe what the team leader did to involve you.

Please give feedback to the team leader about the team process.

Any other comments?

<table>
<thead>
<tr>
<th>Team member name:</th>
<th>Workplace:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature:</td>
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</tr>
<tr>
<td>Contact details:</td>
<td></td>
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Task 3: Assessor feedback to trainee

When the assessor agrees you have completed this task successfully, they will sign it off on the assessment summary page at the front of this assessment.