

REAL Observer's Handbook

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Contents

| | |
|-----------|---|
| 3 | About Careerforce |
| 3 | How do I become a REAL Observer? |
| 4 | What is a REAL Observer? |
| 5 | The REAL Approach |
| 6 | Who can be a REAL Observer? |
| 6 | Why you have been asked to be a REAL Observer |
| 7 | Why is learning and assessment done in the workplace? |
| 8 | What does this mean for you as a REAL Observer? |
| 8 | Learning in the workplace |
| 9 | What will you do as a REAL Observer? |
| 10 | Evidence |
| 11 | Several ways to collect evidence |
| 12 | Gathering evidence |
| 14 | Documenting evidence |
| 15 | Insufficient evidence |
| 15 | How to ask questions |
| 16 | Providing feedback |
| 17 | Examples of effective observation - Exemplar 23388 |
| 19 | Exemplar 23386 |
| 22 | Exemplar 28542 |
| 24 | Exemplar 11097 |
| 27 | Exemplar 16857 |
| 33 | Exemplar 28518 |
| 37 | Exemplar 28530 |
| 40 | Exemplar 29382 |

About Careerforce

Careerforce is a business division of Te Pūkenga, the New Zealand Institute of Skills and Technology. We support workplace-based training, enabling employees to achieve nationally recognised qualifications, and deliver superior outcomes across the health and wellbeing sector.

On behalf of the team at Careerforce, thank you for doing your part in supporting your colleagues to complete their training and achieve their qualification.

Careerforce offers qualifications in the following sectors:

- Aged Care
- Cleaning
- Disability Support
- Healthcare Services
- Home and Community Services
- Mental Health and Addiction Support
- Social and Community Services
- Urban Pest Management

How do I become a REAL Observer?

A Careerforce Learning Engagement Advisor will run a short workshop to train you for this role. You will receive a certificate of attendance and you will be officially recorded as a trained observer in the Careerforce database for audit purposes.

What is a REAL Observer?

REAL Observers play a significant role in the assessment process. They support assessors by observing a trainee at work and recording what they saw the trainee do during normal work activities.

As an observer, you are often referred to as the 'assessor's eyes and ears'. The assessor does not always work alongside the trainee to see and experience the 'naturally occurring evidence' as it takes place.

Observers can identify and collect evidence that already exists.

- You may have **seen** trainees already.
- You may have **heard** trainees.
- You may have **sighted** a filed document or record completed by the trainee.
- It may have already been **assessed**.

You know the correct standard of performance expected of a trainee within your workplace requirements. You are confirming for the assessor that the trainee did the job correctly, safely and in the way your organisation requires them to do it.

An observer/verifier is not an assessor. They do not make judgements about a trainee's competence; that is the role of the assessor.



The REAL approach

REAL is how you, as an observer, can make a difference for your trainees. It's the Careerforce way of doing things.

REAL stands for:

Respectful

Acknowledging the skills and competencies a trainee already has.

Efficient

Using existing workplace processes and systems in the collection of evidence.

Applied

New skills learned are transferred into the workplace.

Living

Training is flexible, dynamic and progressive and is responsive to need.



Who can be a REAL Observer?

A REAL observer is someone with much more experience than the trainee and who understands the standards of work required and the policies and procedures of their workplace. This could include:

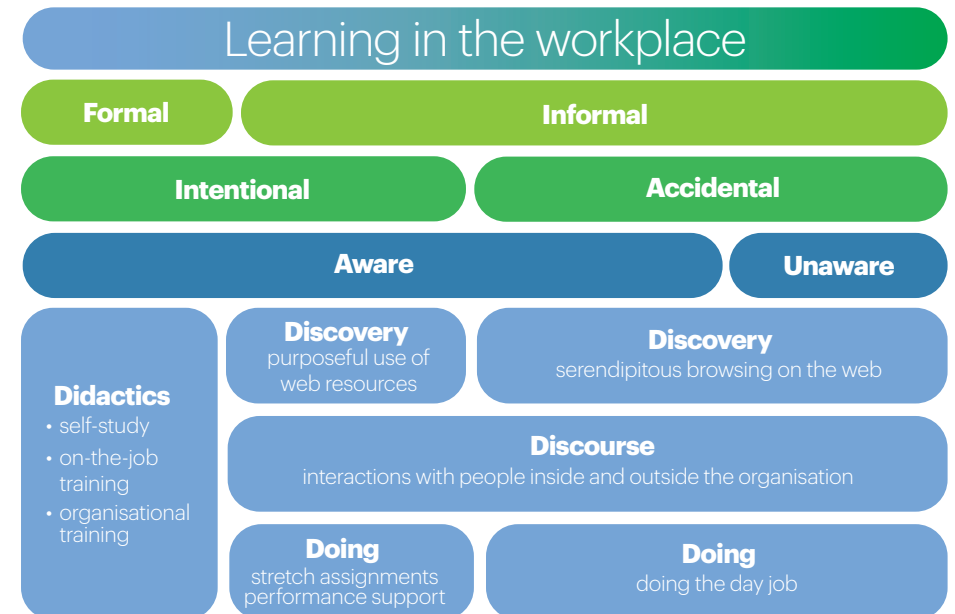
- Team leader, supervisor, manager
- Health professionals, social workers, youth leaders, cleaners
- Members of a multi-disciplinary team
- Senior staff members
- Coordinators, administrators
- Educators, trainers
- Senior support workers

Why you have been asked to be a REAL Observer



Why is learning and assessment done in the workplace?

The most effective learning and development of skills happens when a trainee applies what they know and can do in a real situation. Learning is not a separate activity from work but one that happens in the workflow and as a result of work.



Credit: Jane Hart - Modern Workplace Learning

What does this mean for you as a REAL Observer?

This means that when you are required to complete observations or verify a trainee's performance, there is existing evidence in your workplace.

The diagram above shows how this evidence could be collected through workplace learning.

For example: formal learning could be a trainee attending manual handling training and then as an observer, you intentionally and informally observe them to ensure they are demonstrating good manual handling.

| Learning in the workplace | | | | | |
|---------------------------|--|--|--|--|-------------------------------|
| | Observe the trainee in their natural work environment. | Ensure that the evidence/performance meets your organisational requirements (policies and procedures). | Ask the trainee questions to ensure their understanding as needed. | Sighting progress notes, communication book, reports and incident reports. | Give feedback to the trainee. |
| Formal | ✓ | ✓ | ✓ | | ✓ |
| Informal | ✓ | | ✓ | ✓ | ✓ |
| Intentional | ✓ | ✓ | ✓ | ✓ | ✓ |
| Accidental | ✓ | | | ✓ | ✓ |
| Aware | ✓ | ✓ | ✓ | ✓ | ✓ |
| Unaware | ✓ | | | | ✓ |

What will you do as a REAL Observer?

- Observe the trainee in their natural work environment.
- Ensure that the evidence/performance meets your organisational requirements (policies and procedures).
- Ask the trainee questions to ensure their understanding and competence as needed.
- Provide clear information to the assessor, completing any required documentation.
- Give feedback to the trainee.

Note: Careerforce previously used the terms verifier and verification. Where a Careerforce assessment may use these terms, please read them as observer or observation. It may be that not all material has yet been updated to reflect this change.



Evidence



Several ways to collect evidence

Naturally occurring

- Observations (yours and others)
- Documentation (within the workplace)
- Attestation (from those who know)

Specifically elicited

- Written assessment tasks
- Observation (real and/or simulated)
- Gathering evidence through contextualised discussion (talking it through)

Observers help the assessor to gather a picture of the trainee's **skills** and **knowledge** by noting **naturally occurring evidence** that happens during their daily work.

Observers work with the trainee and **see** what they do and **hear** how they interact with staff and clients.

Your direct observation provides valuable information to an assessor to build a picture of the trainee's competence.

Your trainee will have completed **paperwork/documentation** as part of their day-to-day work.

Don't go looking for existing evidence tomorrow if you already saw it today!

Gathering evidence

You can use existing evidence of what you do at work!

What can you do if you work independently?

Start conversations with:



- keep reports and documentation
- record incidents/milestones
- take photos
- make sure others are aware of what you are doing on a consistent basis

Communicate with people to get evidence from different views

In person

- interviews
- feedback from: residents, clients, tāngata whai ora, supported people, guests, students, their whānau, other professionals
- kōrero matanga

Attestations

Attestations can be:

- letters from your supervisor stating competency from a work placement

Observations

- personal plan reviews
- performance reviews
- peer reviews
- interventions

Find existing documents from workplace processes

Organisational documents

- service delivery plans
- employee handbook
- policies and procedures
- rosters
- service plans
- consumer reviews
- risk management plans
- codes of conduct
- health and safety policies
- recruitment/employment processes

Documents specific to your role

- diaries and journals
- progress notes
- letters
- contracts
- running notes
- competency checklists
- timetables
- planning notes
- meeting minutes
- certificates
- risk management plans
- performance development plans
- appointment information

Forms

- feedback forms
- risk management plans
- work satisfaction surveys
- hazard reports
- client reviews
- care plan reviews
- service review evaluations

Emergencies

- health and safety reports
- accident/incident/risk/hazard reports



You can use evidence of your training journey

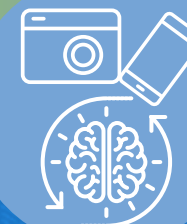
- in service/education programme
- induction and orientation
- evidence of an additional responsibility (e.g. part of a committee or a union)
- training courses
- specific training (e.g. medication, infection control, management challenging behaviour)



Get creative! Think about new ways to record what you do in your role

Recorded on media

- videos
- brainstorm
- photos
- presentations



Documenting evidence

Using the trainee assessment and observation forms:

- Complete checklists
- Make brief notes within comment boxes
- Be specific to the task
- Date and sign where indicated

Remember! Someone independent of yourself should be able to pick up the assessment and get a clear picture of the trainee's performance.

Examples of notation

- 'Personal plan sighted and followed by trainee'. SP 12/5/20
- 'Strategies described and implemented as per clients Behaviour Plan'. ML 7/4/20
- 'The trainee consistently uses te reo and is actively engaged in powhiri, mihimihi, karakia and waiata. The trainee has demonstrated kawa and tikanga when they lead the youth activities'. HP 14/6/20
- 'The trainee demonstrated correctly how to clean the bathroom from top to bottom. This included explaining the need to ensure they do not transfer dirt from areas that have not already been cleaned'. AW 30/5/20
- 'Workplace Care Medication Competency completed 5/03/20'. CT 13/05/20
- Client satisfaction survey dated 1/12/20 (sighted). Evidences effective communication. JM 12/5/20
- 'Reported change in client condition (skin rash) to Clinical Coordinator verbally'. TR 19/4/20
- 'Consistently completes clear and concise progress notes'. FS 7/7/20

Insufficient evidence

If you have not seen sufficient evidence of the trainee's performance, do not sign off the tasks on the assessment or observation form until you have seen enough.

It may be that you have observed a task being performed but to obtain all the evidence required you might have to have a chat with the trainee to 'talk it through'. This is where you can get that little extra evidence that the assessor will require by using open ended questions.

Highlight the gaps in performance if you cannot obtain the extra evidence, and then support learning to fill the gaps in knowledge and performance.

Once the additional learning and practice have taken place, you only need to re-observe the part of the task that did not meet the requirements.

You can sign off once you can confirm consistency has now been met.

How to ask questions

Observers should not lead the trainee.

Here are some examples that you might start with:

How would you ...?'

Why is it ...?'

Who might you ...?'

When would you ...?'

What else might you do ...?'

Where would you ...?'

Tell me more about ...?'

When you did XYZ, tell me ...?' (who, what, when, where, why, how?)



Providing feedback

How to provide feedback when standard is not met

“Feedback is an important part of the learning process. Without it, employees only have their own estimation of how well they are performing, and this may be quite inaccurate.”

Lansbury & Prideaux (1981)

As part of your role as a REAL Observer you will be required to provide the trainee with some feedback.

Start with reflection – allow the candidate to reflect on how they thought the assessment went. You might say:

“How do you think you went when supporting Mr Grey with his shower and respecting his dignity?”

If they know they have not done so well with the task, this can help to open the conversation about how they could have done it differently. The feedback session becomes a learning opportunity, or their feedback may show you they knew what they were meant to do, (however you may wish to observe them again before you sign them off).

Meaningful feedback is: constructive; clear; specific:

- **Be constructive** - honest and diplomatic. Feedback needs to be given in a diplomatic way, valuing the trainee’s time and commitment to their observation tasks.
- **Be clear** - this requires you to follow the K.I.S.S. principle (Keep It Simple Stupid). You need to know exactly what feedback you want to give before you say it.
- **Be specific** – by identifying the exact issues and aspects of the observation tasks that you want to discuss and highlighting the main points in your feedback. Give specific examples that show they are competent, or if necessary, not yet competent.

Feedback as an overall process will provide motivation and encouragement to the trainee and will help support and enhance their reflective practice.

Examples of effective observation

Exemplar 23388 Challenging Behaviour

Observation

Note to observer:

You must have observed the trainee working over a period of time. You may have recently seen the trainee do one or more of these tasks. If so, you can record on the form evidence previously seen, heard, documented or filed.

The trainee has provided details of identifying, implementing and evaluating positive approaches to reduce the need for challenging behaviour. You need to be confident that the information they have provided is correct and that the trainee consistently uses positive approaches to reduce challenging behaviour.

Please comment on the trainee’s performance. The assessor may wish to contact you to discuss this.

I confirm that the trainee has identified, implemented and evaluated positive support strategies to reduce challenging behaviour to the standards below. The trainee:

Assessor/observer to complete



- follows their organisation’s policies and procedures at all times.



Comments: *Jane's calm demeanor makes her an ideal staff member to support people who exhibit challenging behaviour. She is very aware of our policies and procedures and adheres to them. If she is ever not sure, she will always ask*

- implements strategies following their professional responsibilities.



Please comment on specific strategies:

Jane maintains a calm and quiet environment as much as she can and talks in a quiet calm manner. She has the experience to recognise triggers and to de-escalate

| | | | | | | | | | | | | | | |
|--|-------------------------------------|--------------|------------------|--------------------|--------------|----------------|------------|----------------|-------|-----------------|--------------------------------|-----------------------------------|--|--|
| <i>behaviours before they cause concern. She uses redirection to good effect.</i> | | | | | | | | | | | | | | |
| <ul style="list-style-type: none"> evaluates and reviews strategies identifying any positive and negative outcomes from their implementation. <p>Please provide a comment on how the trainee uses strategies to identify positive and negative outcomes:</p> <p><i>Jane will always report if a recorded strategy no longer works and notes strategies that are currently working. She uses praise to reinforce good behaviour.</i></p> | <input checked="" type="checkbox"/> | | | | | | | | | | | | | |
| Observation comments from the observer or assessor | | | | | | | | | | | | | | |
| <p>General comments:</p> <p><i>Jane's experience has been valuable when people we support are going through an unsettled phase and displaying challenging behaviour as she practices de-escalation techniques to great effect.</i></p> | | | | | | | | | | | | | | |
| <p>If you are an observer, please give your details as the assessor may wish to contact you.</p> <table border="1"> <tr> <td>Observer's name:</td> <td><i>Sally Smith</i></td> <td>Designation:</td> <td><i>Manager</i></td> </tr> <tr> <td>Signature:</td> <td><i>S Smith</i></td> <td>Date:</td> <td><i>16-12-19</i></td> </tr> <tr> <td>Contact details (phone/email):</td> <td colspan="3"><i>Smiths@carerfacility.co.nz</i></td> </tr> </table> | | | Observer's name: | <i>Sally Smith</i> | Designation: | <i>Manager</i> | Signature: | <i>S Smith</i> | Date: | <i>16-12-19</i> | Contact details (phone/email): | <i>Smiths@carerfacility.co.nz</i> | | |
| Observer's name: | <i>Sally Smith</i> | Designation: | <i>Manager</i> | | | | | | | | | | | |
| Signature: | <i>S Smith</i> | Date: | <i>16-12-19</i> | | | | | | | | | | | |
| Contact details (phone/email): | <i>Smiths@carerfacility.co.nz</i> | | | | | | | | | | | | | |

Exemplar 23386 Personal Cares

Task 2: Support a person to meet their personal care needs

In this task, you will demonstrate supporting someone with five different personal cares while your verifier or assessor observes you. This might happen over several days with more than one person. Your assessor may also ask you questions as you work.

| Observation checklist | | | | | |
|--|---|--------------------------|--------------------------|--------------------------|--------------------------|
| The information in this column is for you. | These columns are for the observer to check off for each observation. | | | | |
| You support the person's personal care needs by: | ✓ 1 | ✓ 2 | ✓ 3 | ✓ 4 | ✓ 5 |
| <ul style="list-style-type: none"> doing the following tasks e.g. shower, shave. <i>Write in the personal care that was done.</i> | <i>Toileting</i> | <i>Shower</i> | <i>Dressing</i> | <i>Shaving</i> | <i>Oral cares</i> |
| <ul style="list-style-type: none"> following their personal plan. <i>Show your assessor where on the personal plan you identify information about personal cares.</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> following your organisation's policies and procedures. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> taking into account the person's functional ability. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> using their preferred name. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> encouraging the person to make choices, where possible. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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| | | | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| • respecting the person's privacy. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| • keeping information about the person confidential. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| • respecting the person's cultural identity. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| • using their preferred communication method. <i>For example, speaking slowly, using gestures or a communication device.</i> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| The trainee can explain care needs of the person supported. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| | | |
|---|---|-----------------------|
| Observation 4 | Workplace observer /Assessor: <i>JM</i> | Date: <i>13/11/19</i> |
| Comments: <i>Shaving. Independence goal supported. Visual cards used to enable DS to shave with his electric razor.</i> | | |
| Observation 5 | Workplace observer /Assessor: <i>JM</i> | Date: <i>13/11/19</i> |
| Comments: <i>Oral cares. Jane was unhurried in her approach which enabled DS his dignity and independence.</i> | | |

| Observation comments | | |
|---|---|-----------------------|
| The workplace observer or assessor must fill this out for each observation, including comments. | | |
| Observation 1 | Workplace observer/Assessor: <i>JM</i> | Date: <i>11/11/19</i> |
| Comments: <i>Toileting client JB. Jane followed continence plan. Provided gentle prompt and assistance with clothing only promoting JB's independence.</i> | | |
| Observation 2 | Workplace observer /Assessor: <i>JM</i> | Date: <i>13/11/19</i> |
| Comments: <i>Obs 2-5 all completed with client DS during morning cares. Showering. Maintained safety and comfort. Prompted DS to use shower rail and bathroom warm.</i> | | |
| Observation 3 | Workplace observer /Assessor: <i>JM</i> | Date: <i>13/11/19</i> |
| Comments: <i>Dressing. Encouraged DS to choose his clothing for the day and only assisted as needed with buttons and laces.</i> | | |

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Exemplar 28542 Professional and ethical behaviour

Task 3: Working professionally and ethically

Ask your manager, supervisor or a senior staff member who you have worked with closely to complete and sign the verification form provided with this assessment.

| Verification form | |
|---|---|
| <p>You have been asked to verify that the trainee works professionally and ethically in a health and wellbeing setting as required by law, a relevant code of ethics, and/or your workplace policies and procedures.</p> <p>You have been asked to do this in your capacity as the trainee's manager, supervisor or senior staff member who has worked closely with the trainee.</p> <p>Please add comments to support the verification statements below.</p> | |
| <p>Please tick each statement below if you agree that the trainee has met the requirements listed below.</p> | ✓ |
| <p>I confirm that the trainee consistently demonstrates professional and ethical behaviour according to the standards below. The trainee:</p> | |
| <ul style="list-style-type: none"> works within the specifications and boundaries of their role. | ✓ |
| <p>Please comment:</p> <p><i>Tino is very clear about his role and boundaries. Tino seeks guidance and reports issues reliably.</i></p> | |
| <ul style="list-style-type: none"> behaves professional and ethically in all work activities. | ✓ |
| <p>Please comment:</p> <p><i>Tino shows respect and support for his work colleagues and client reflects that the process he has taken is correct and fair.</i></p> | |
| <ul style="list-style-type: none"> behaves professionally and ethically in their interactions with others. | ✓ |

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| <p>Please comment:</p> <p><i>Tino is a person who relates to others naturally with respect and understanding.</i></p> | |
| <ul style="list-style-type: none"> addresses ethical issues, grievances and/or disputes according to organisational policy and procedure. | ✓ |
| <p>Please comment:</p> <p><i>Tino discusses areas of uncertainty and concerns. He has a sense of fairness, seeing all sides of a discussion.</i></p> | |
| <p>maintains professional, cultural and age-appropriate physical, emotional, sexual and spiritual boundaries at all times.</p> | ✓ |
| <p>Please comment:</p> <p><i>Tino respects all people and is professional regarding personal beliefs and values.</i></p> | |
| <ul style="list-style-type: none"> works within relevant legislation and/or organisational policies and procedures at all times. | ✓ |
| <p>Please comment:</p> <p><i>Tino's work reflects his understanding and application of the code of rights.</i></p> | |
| <p>Please add any further comments you wish to make.</p> <p><i>Tino will respectfully address issues of concern to support and advocate for others if needed.</i></p> | |
| <p>Verifier Name: <i>Sammy Soon</i></p> | |
| <p>Verifier Signature: <i>S. Soon</i></p> | <p>Date: <i>20/02/20</i></p> |
| <p>Contact details: ph/email: <i>Sammy.Soon@email.co.nz 021027022</i></p> | |

Exemplar 11097 Listen to gain information

| Observation | |
|---|------------------------------------|
| The trainee must do the following tasks. The observer/assessor may also use this column to record comments. | Assessor/observer to complete ✓ |
| The trainee needs to have demonstrated active listening techniques to gain and respond to information in two different workplace situations. | Date: 03/12/19 |
| Situation Two: Provide a brief summary of the workplace situation where the trainee demonstrated active listening techniques. <i>On the phone Kim advised the client that I was present and gained consent for me to listen in on the conversation.</i> | ☒ |
| For Situation Two the trainee must have being observed doing the following tasks: | |
| <ul style="list-style-type: none"> responded to non-verbal cues in a way that fitted this situation. Please comment: <i>The client was reluctant to divulge all information in fear of getting the support worker in trouble. Kim was able to draw the information from them by continually asking questions and reassurance.</i> | ☒ |
| <ul style="list-style-type: none"> clarified information by paraphrasing, summarising and questioning. Please comment: <i>Kim was really good at questioning and putting things into context for the client until they</i> | ☒ |

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| <i>understood that they were ok to call and raise concerns.</i> | |
| <ul style="list-style-type: none"> analysed information to determine content and recall the message to check for accuracy and meaning. Please comment: <i>Great use of yes/no questions – “so you are calling about.” “Is that correct?” Kim does this really well and is always repeating information.</i> | ☒ |
| <ul style="list-style-type: none"> ensured their responses, in terms of actions, matched the purpose of the interaction. Please comment: <i>Kim clearly communicated with the right tone of voice. She didn't speak over them or raise her voice. She also gave them time to speak without interruption.</i> | ☒ |
| <ul style="list-style-type: none"> ensured the language and protocols in their responses are appropriate to the cultural situation. Please comment: <i>Kim was very respectful of the lady that rang. She always put things into context for her and didn't use language she couldn't understand (didn't use clinical terms).</i> | ☒ |
| <ul style="list-style-type: none"> responded to the emotions of the person speaking in a manner that fitted the situation and the subject matter. Please comment: <i>Kim was very reassuring to the client, very polite and gentle. Lovely kind Ahua.</i> | ☒ |

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Observation comments from the observer or assessor

Excellent listening and giving clear feedback to the client. Very good at being able to gauge how the person you are communicating with is feeling. Able to also control the situation and bring things back into perspective for the client until a situation is found. Nga mihi atu laia koe Kim.

If you are an observer, please give your details as the assessor may wish to contact you.

| | | | |
|--------------------------------|----------------------------------|--------------|--------------------|
| Observer's name: | <i>Tim Jones</i> | Designation: | <i>Team Leader</i> |
| Signature: | <i>T. JONES</i> | Date: | <i>5/12/19</i> |
| Contact details (phone/email): | <i>Tim.Jones@workplace.co.nz</i> | | |

Task 1: Assessor's feedback to trainee

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

Exemplar 16857 Youth development project

Observation

Ask your manager, supervisor or a senior staff member that you have worked closely with to complete and sign the observation form provided with this assessment.

Observation

Note to observer:

You have been asked to complete this observation in your capacity as the trainee's manager, supervisor or senior staff member that has worked closely with the trainee and who is recognised as having expertise in the developing projects in the youth development sector.

This is to verify their work towards unit standard 16857: Help to plan, develop, implement and evaluate a youth development project in the youth development sector. You have been asked to verify that the trainee assisted a project coordinator to plan, develop, deliver, and evaluate a youth development project.

Please add comments to support the observation questions listed below.

Have you had sufficient opportunity to observe the trainee and study the evidence they have collated to be certain the material they are presenting is their own work? Please comment.

Please tick each question below if you agree the trainee has met the following requirements.



Task 1: Help to plan a youth development project

16857: 1.1, 1.2, 1.3.

Task one requires the trainee to assist with the planning of a youth development project. Please tick each question below and add comments if you agree the trainee has met the requirements listed below.

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| | |
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| <ul style="list-style-type: none"> • did the trainee agree with the project coordinator their role and function as a youth worker in helping to plan the project? <p>Please comment:</p> <p><i>Yes, Anna and I signed an agreement prior to the start of mahi. See position description which also acts as the agreement.</i></p> | <input checked="" type="checkbox"/> |
|--|-------------------------------------|

Observation

| | |
|--|-------------------------------------|
| <ul style="list-style-type: none"> • did the trainee assist the project coordinator in the planning for three factors essential to the delivery of the project? Essential factors may include and are not limited to: needs, aims, objectives, implementation and evaluation. <p>Please comment:</p> <p><i>Anna did really well to stay focussed on the needs of participants and the objectives of the programme throughout the planning stages. She did a lot of research prior to developing the schedule and activities and linked them with purpose. She kept this purpose clear in her mind when delivering the programme.</i></p> | <input checked="" type="checkbox"/> |
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| <ul style="list-style-type: none"> • did the trainee assist the project coordinator to ensure that the planning of the project met with at least two of the requirements from list below? <ul style="list-style-type: none"> - the use of available resources to achieve objectives - responsibilities and accountabilities of people who will be involved in implementing the plan - things that may go wrong - procedures to deal with unplanned events - methods for evaluating progress towards achieving the objectives. <p>Please comment:</p> <p><i>Anna was able to cover all requirements listed. She researched and used resources that we had available to achieve what she wanted to do. She held a meeting to support everyone knowing what they were responsible for and she created RAMS for the pools. She knew policies and procedures for emergencies and led the delivery of a fire drill. Anna also used formal and informal ways to collect feedback and evaluation information.</i></p> | <input checked="" type="checkbox"/> |
|---|-------------------------------------|

Task 2: Help to plan, develop and deliver a youth development project

Task two requires the trainee to help the project coordinator with the development and delivery of a youth development project. Please tick each question below and add comments if you agree the trainee has met the requirements listed below.

| | |
|---|-------------------------------------|
| <ul style="list-style-type: none"> • did the trainee assist in the development and delivery of the project according to their role and function as a youth worker? <p>Please comment:</p> <p><i>Yes, Anna led the delivery of the programme and used all resources including staff to achieve this. She kept others welfare and needs in the forefront of her mahi and brought a lot of empathy and understanding in her interactions.</i></p> | <input checked="" type="checkbox"/> |
|---|-------------------------------------|

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| | |
|---|---|
| <ul style="list-style-type: none"> • did the trainee assist the project coordinator to identify the characteristics and needs of youth attending the project? <p>Please comment:</p> <p><i>Anna was provided information with participants and staff needs however during the delivery she was able to explain why some participants do what they do. She was willing to sit down with young people, listen and respond appropriately giving others control with solutions and outcomes to issues or problems.</i></p> | ☒ |
| <ul style="list-style-type: none"> • did the assistance that the trainee provided, during the planning phase of the project, meet the characteristics and needs of youth? <p>Please comment:</p> <p><i>Yes, Anna used the information provided to develop relevant, stimulating and current activities for participants. She also identified activities that would support youth.</i></p> | ☒ |
| <ul style="list-style-type: none"> • did the trainee encourage youth participation during the development of the project in accordance with the principles of the Youth Development Strategy Aotearoa? <p>Please comment:</p> <p><i>Anna had informal meetings where she and other youth would discuss activities and how and why they would do them. She also had a meeting (recorded) where questions and input was encouraged.</i></p> | ☒ |
| <ul style="list-style-type: none"> • did the trainee respond to any unplanned events or problems during the implementation in accordance with their responsibilities in the plan? <p>Please comment:</p> <p><i>Anna was able to adapt her plan to suit the day and participants involved. She also included youth in these</i></p> | ☒ |

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| | |
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| <p><i>meetings. Anna also found an alternative solution when the pools were closed i.e. – using the school pool.</i></p> | |
| <p>Task 3: Help to evaluate a youth development project</p> <p>Task three requires the trainee to help the project coordinator to evaluate a youth development project. Please tick each question below and add comments if you agree the trainee has met the requirements listed below.</p> | |
| <ul style="list-style-type: none"> • did the trainee assist the project coordinator with the evaluation of the project by measuring outcomes of the project against its objectives? <p>Please comment:</p> <p><i>Anna did well at collecting informal feedback and evaluations from participants and youth throughout the delivery of the programme. This became invaluable at evaluation time.</i></p> | ☒ |
| <ul style="list-style-type: none"> • did the trainee provide support to source feedback from stakeholders to ensure that the project met their needs? <p>Please comment:</p> <p><i>Parents were encouraged to partake in formal feedback.</i></p> | ☒ |

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- did the trainee consider each of the Youth Development Strategy Aotearoa principles during all stages of the project?



Please comment:

Anna needed to learn the principles but after discussions and reading she was able to take into consideration each principle when planning and engaging with others.

Please add any further comments you wish to make.

Anna has great strengths in problem solving which allows her to adapt to the environment and create alternatives to problems and solutions.

Thank you for your help with this observation.

Observer name: *Carol Long*

Signature: *C. Long*

Date: *29/9/19*

Contact details: *carol.long@youthwork.co.nz*

(phone/email)



Exemplar 28518 Interact with people

Task 1: Interact with people to provide support

For this task, an assessor or observer will observe you interacting with people as part of your role. This could happen on several occasions and may include interactions with the people you support, their family or whānau, and your colleagues or team members.

Your observer will complete the following observation form and may ask questions about what you are doing or what you have done previously. They may have recently seen you do one or more of these tasks. If so, they can record on the form evidence previously seen, heard, documented or filed.

The observer is likely to be your manager, supervisor or team leader or a person who has observed your work over a period of time and can confirm that you complete the tasks to the standard required. Your assessor may contact your observer to discuss their comments about your performance.

Read the observation form to make sure you know how your performance will be assessed.

Observation

Note to observer:

You have been asked to complete this observation as a supervisor/manager who has frequently observed the trainee's interactions with people they support in a health or wellbeing setting.

You need to be confident that the trainee consistently follows organisational policies and procedures and has met the requirements listed below.

Please check the boxes below if the trainee meets the standards. If they do not, please discuss the requirements with the trainee. Please comment on the trainee's performance.

You may ask the trainee questions as they work to clarify their understanding of the tasks they undertake. The assessor may wish to contact you to discuss this observation.

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| <p>The trainee must do the following tasks.</p> <p>The observer/assessor may also use this column to record comments.</p> <p>The trainee:</p> | <p>Assessor/observer to complete</p> <p>✓</p> |
|--|---|
| <ul style="list-style-type: none"> checks instructions for understanding. <p>Observer to comment on what the trainee did. For example, repeating instructions back in their own words to show they understand them, or asking questions for further clarification.</p> <p><i>Aroha seeks guidance and reports issues when they arise. She will clarify instructions if uncertain.</i></p> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> accurately carries out instructions they have been given. | <input type="checkbox"/> |
| <ul style="list-style-type: none"> communicates with a person they support in a way the person prefers and in a way they can understand. <p>Observer to comment on how the trainee did this. For example: speaking slowly and clearly to a person who can't hear very well or facing the person directly so they can read the trainee's lips as they speak.</p> <p><i>I have observed Aroha talk with her colleagues in a calm and respectful tone. She showed good eye contact and listened without interrupting as her colleague responded.</i></p> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> uses language and terminology that the person understands when providing support. | <input type="checkbox"/> |

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| | |
|--|--------------------------|
| <ul style="list-style-type: none"> interacts about a person's support and uses language and terminology in ways that comply with their organisation's policies and procedures. <p>Briefly describe the trainee's interactions with two of the following:</p> <p>A person they support:</p> <p>The person's family or whānau: <i>Aroha shows respect and communicates in a way that enabled informed choices with the whanau.</i></p> <p>Colleagues and/or team members: <i>Aroha treats team members / colleagues with respect, courtesy and fairness.</i></p> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> follows their organisation's policies and procedures when giving spoken or written reports about people they support. <p>Attach a sample of a written report, if appropriate, or briefly describe an oral report given by the trainee.</p> <p><i>Handover report given verbally. Aroha reported that the client had a good busy day. The client managed to sort out their benefit and will have money in their bank account tonight. The client is very happy about this. 18/12/19 T. Smith</i></p> | <input type="checkbox"/> |

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Please add any further comments you wish to make. *Keep up the good work you are doing! You work well with those you support and ensure that your communication is clear so that they understand you. You are always respectful towards your client and whānau members. Well done!*

| | | | |
|--------------------------------|---------------------------------------|--------------|-------------|
| Observer name: | Tara Smith | Designation: | Team Leader |
| Signature: | T. Smith | Date: | 18/12/19 |
| Contact phone number or email: | T.Smith@carefacility.co.nz 0211156632 | | |

Exemplar 28530 Move and store equipment

Observation

Note to observer:

You have been asked to complete this observation as the supervisor/manager of the trainee. You must have observed the trainee working over a period of time.

The trainee has provided details of three pieces of equipment they have moved using three different manual handling techniques.

You need to be confident that the information they have provided is correct and that trainee consistently applies manual handling techniques according to the standards listed in the checklist below.

If you agree that the trainee meets these standards please tick the boxes below. If you do not agree please discuss the requirements with the trainee. Please comment on the trainee's performance. The assessor may wish to contact you to discuss this observation.

| The trainee must move three different pieces of equipment using three different manual handling techniques and consistently meet the standards below. | Assessor/observer to complete | | |
|---|-------------------------------|--------------------------|--------------------------|
| | ✓ 1. | ✓ 2. | ✓ 3. |
| Before, during and after each move, the trainee must make sure they have: | | | |
| • used safe manual handling techniques. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • moved the equipment safely within the expected timeframes. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • stored the equipment appropriately following your organisation's policies and procedures. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • checked that the equipment was stored safely (following manufacturer's specifications if there are any). | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • followed your organisation's policies and procedures at all times. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Please add any further comments you wish to make.

Observation comments

The observer for each observation must fill this out, including comments.

Observation 1 Observer: Anna Smith Date: 15/10/19

Equipment moved: *Various medical equipment*

Manual handling technique used: *Ergonomic posture*

Comments: *Equipment was securely placed on the trolley so not to obscure Abby's vision pathway. She maintained good posture throughout the move. The trolley was not too heavy for Abby.*

Observation 2 Observer: Anna Smith Date: 15/10/19

Equipment moved: *Re-allocation of medical equipment on bed prior to transferring patient to ward.*

Manual handling technique used: *Ergonomic posture*

Comments: *Abby had to re-allocate medical equipment required by the patient and secure it safely to the bed frame. She carefully positioned it on the side bars and secured it but making sure the patient had ample room and had clear visibility. Good body management, posture and ensuring the equipment was safe.*

Observation 3 Observer: Anna Smith Date: 15/10/19

Equipment moved: *Notes on a trolley*

Manual handling technique used: *Ergonomic posture*

Comments: *Far too many notes to carry, Abby got a trolley. She carefully stacked the notes onto the trolley not too high and delivered the notes. She then returned the trolley and stored it appropriately in its designated area.*

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Exemplar 29382 Cleaning independently

Task 1: Clean independently

For this task, you need to show that you can work independently as a cleaner.

Your observer will observe you working independently as part of your job. Evidence for tasks may come from work completed at more than one site. The observation can take place over a period of time, or at one time.

Your observer will complete the following checklist and may ask questions about what you are doing or what you have done previously. They may have recently seen you do one or more of these tasks. If so, they can record on the form evidence previously seen, heard, documented or filed.

Before you are assessed make sure you know:

- your organisation's policies and procedures.
- any relevant legislation.

Read the observation checklist to make sure you cover all requirements.

| Observation checklist | |
|---|------------------------------------|
| The trainee must do the following tasks. The observer/assessor may also use this column to record comments. | Assessor/observer to complete ✓ |
| Work independently as a cleaner. | Date: 03/09/19 |
| Negotiate a cleaning and maintenance schedule with the client by finding out: <ul style="list-style-type: none"> • when to clean. • what to clean. • how often the cleaning is to be done (the frequency). • any other instructions (if required). <p>Make sure you know exactly what the client wants and always communicate within a timely and respectful way.</p> | <input type="checkbox"/> |

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| Select and put on the correct PPE for the task. Observer to write down what PPE was used: <i>Sam uses gloves in all his tasks and adds other items (masks, apron) when required</i> | <input type="checkbox"/> |
| Choose equipment and cleaning agents suitable for the site and the cleaning tasks to be performed. <i>Make sure all equipment is safe and in good working condition.</i> Observer to write down what equipment and cleaning agents were used: <i>Sam's equipment is in good condition. He uses the coloured cloths for specific areas and knows his chemicals very well.</i> | <input type="checkbox"/> |
| Clean with minimum disruption to occupants and anyone using the building. <i>Consider cleaning at a time when less people are in the area. For example, during breaks or after hours if possible.</i> | <input type="checkbox"/> |
| Change your work practices to suit the client's circumstances and needs. <i>For example, only use noisy equipment after normal business hours.</i> Observer to comment on how the trainee changed their work practices to suit the client's needs and minimise disruption at the site: <i>Sam changes his practices to ensure he doesn't disrupt his Client. For example, if there is a meeting in a room that needs cleaning, Sam will work around this and return when it is appropriate.</i> | <input type="checkbox"/> |
| Maintain client privacy and confidentiality. <i>If you hear/see anyone breaking confidentiality and spreading information about a person/client you should report it to your supervisor/manager.</i> | <input type="checkbox"/> |

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| | |
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| Correctly secure and dispose of sensitive waste. | ☒ |
| <p>Demonstrate using time management skills by:</p> <ul style="list-style-type: none"> • being organised. • prioritising tasks. • working efficiently, using principles like top-to-bottom when cleaning. • completing the work in the allocated timeframe. <p>Observer to comment on the trainee's use of time management skills:</p> <p><i>Sam's trolley is always well supplied, he prioritises important tasks first and always completes everything within the timeframe.</i></p> | ☒ |
| Complete cleaning tasks meeting both organisational and client requirements. | ☒ |
| <p>Maintain building security by:</p> <ul style="list-style-type: none"> • keeping keys and log-in information safe at all times. • reporting any security issues. • following site procedures for locking up (if required). <p>Observer to comment on how the trainee maintained building security:</p> <p><i>Sam always has his swipe card on him and never lends it to anyone.</i></p> | ☒ |
| <p>Self-audit your work against organisational cleaning standards by:</p> <ul style="list-style-type: none"> • taking responsibility for your own work. • stepping back and checking your work. • making sure you have done everything required. <p><i>You may have a mental or physical checklist you use to self-audit. If you complete a form, attach a copy to this assessment.</i></p> | ☒ |

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| <p>What two strategies could enhance work productivity? Tell your observer about these strategies, following organisational rules for giving feedback or suggestions.</p> <p>Observer to write down these strategies.</p> <p>Strategy 1: <i>As per attachment</i></p> <p>Strategy 2: <i>As per attachment</i></p> | ☒ |
| <p>Communicate with team members in a timely and respectful way.</p> <p>This must include:</p> <ul style="list-style-type: none"> • reporting as per team protocols. <p><i>For example, informing your supervisor/team about any issues or submitting your time sheet showing the hours you have worked.</i></p> <p>This could include:</p> <ul style="list-style-type: none"> • passing on information, either in writing or verbally (for example, a new team protocol). • giving instructions (for example, how to do a task). • giving feedback/suggestions. <p><i>Be aware of barriers - think about who you are speaking to, the environment (is it noisy) and the message you want to send.</i></p> | ☒ |
| <p>Communicate with clients in a timely and respectful way.</p> <p>This could include:</p> <ul style="list-style-type: none"> • negotiating the cleaning schedule. • discussing the outcomes of a risk assessment. • giving recommendations. <p>Be aware of barriers - think about who you are speaking to, the environment (is it noisy) and the message you want to send.</p> <p>Observer to comment on how the trainee communicated with both team members and clients: <i>Sam communicates well with the client as his role is re-active where urgent tasks are requested often</i></p> | ☒ |

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General observation comments from the observer or assessor

Sam's position entails responding to client requests and unexpected errands all day. Communication with team members and clients is crucial in this role and he does this well. He has a schedule to follow as well and prioritises essential tasks early to make sure time is available for the unexpected. He manages his days well and completes all tasks within timeframe.

If you are an observer, please give your details as the assessor may wish to contact you.

| | | | |
|--------------------------------|---|--------------|----------------------------|
| Observer's name: | <i>Bob Jones</i> | Designation: | <i>Hospital Supervisor</i> |
| Signature: | <i>BJones</i> | Date: | <i>9/9/19</i> |
| Contact details (phone/email): | <i>Bob.jones@hospital.co.nz;(09) 123 4567</i> | | |



Notes



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September 2024