## Assessment plan: training and assessment pathway assessment

|  |  |
| --- | --- |
| **RTO** | AMP |
| **Date prepared** | 12/05/2012 |
| **Program name** | What Is Superannuation? “The governing bodies”, “investment life cycle of superannuation” and “Investments” |
| **Competency standard/s** | FNSFLT204A Develop understanding of superannuation |
| **Candidate/s** | New superannuation call centre employees |
| **Assessor/s** | Cassandra Dunning |
| **Assessment date/s & timeframes** | Assessment will be done on the 26/05/2012  The assessment will be apart for a training session that will last 1 hour in total. |
| **Assessment methods and procedure** | On the job  Written test on investment life cycle and investments / multiple choice  Setting and reviewing a scenario, done as a group activity.  Group discussion to determine and confirm understanding. |
| **Assessment location** | In the work place  In the “Learning Lounge” |
| **Venue requirements** | A computer  A projector  Tables and chairs |
| **OHS issues** | Emergency exits  First aid  Accessibility for any disabled candidates |
| **Documentation required** | PowerPoint presentation  Assessment  Hand-outs  Feedback forms |
| **People to be informed** | Employer  Candidates/employees |
| **Reasonable adjustments** | Will be done case by case |
| **Provision for specialist support** | Subject matter expert will be available if required. |
| **Other issues** | If the class is under 4 people the group activity will be done individually |
| **Recording and reporting mechanisms** | The trainer will mark the participants while they do their scenario and conversation to confirm the participants understand the subject.  The participants will be required to get a mark of 8 out of 10 to pass the written exam. |
| **Review mechanisms** | The participants will be reviewed 8 week after completing the product training to confirm they have no gaps in their knowledge and are about to complete the tasks required for their role. |

**Signed by:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Assessor date signed

**Approved by:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Authorising party (print name)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Signature of authorising party date signed

End of Assessment plan (training and assessment pathway)

## Assessment instrument template: observation checklist

**Instructions and requirements**

● This checklist is to be completed by the assessor

● For a satisfactory result, all steps of the procedure must be performed to the standard described below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Details of observation | | | | | |
| **RTO** | | | AMP | | |
| **Candidate name** | | | David Jones | | |
| **Assessor name** | | | Cassandra Dunning | | |
| **Competency standard** | | | FNSFLT204A Develop understanding of superannuation | | |
| **Assessment date** | | | 26/05/2012 | | |
| **Task/procedure observed** | | | Written test on investment life cycle and investments / multiple choice  Setting and reviewing simulations or scenarios.  Group discussion to determine and confirm understanding. | | |
| Observation checklist | | | | | |
| Did the candidate: | | | | **Yes** | **No** |
| 1 | Score 8 out of 10 correct answers on the multiple choices? | | |  |  |
| 2 | Participate in a scenario about superannuation investment life cycle and answer correctly? | | |  |  |
| 3 | Understand the scenario and provide correct information? | | |  |  |
| 4 | Participate in group discussion of the different investment types? | | |  |  |
| 5 | During the discussion demonstrate an understanding of the different investment types? | | |  |  |
| 6 |  | | |  |  |
| 7 |  | | |  |  |
| Results | | | | | |
| **Overall performance** | | **❒ Satisfactory ❒ Not Yet Satisfactory** | | | |
| **Feedback to candidate** | |  | | | |
| **Assessor signature** | | Date: | | | |
| **Candidate signature** | | Date: | | | |

## Assessment instrument template: written questions

**Written test—  
FNSFLT204A Develop understanding of superannuation**

Candidate name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Instructions and requirements**

This is a closed book test

The pass score is 8 points

**Part A: True/False**

***Instructions:*** *Circle the true or false beside each statement (2 point each)*

|  |  |  |  |
| --- | --- | --- | --- |
| 1. | In relation to the superannuation life cycle, people under the age of 30 years  are expected to be invested in high risk investments | true | false |
| 2. | In relation to the superannuation life cycle, people under the age of 30 years  are expected to be invested in conservative investments. | true | false |

**Part B: Multiple Choice**

***Instructions:***  *Circle letters A, B, C or D below each statement to indicate the correct response (1 point each)*

|  |  |
| --- | --- |
| 3. | Which of the following organisations regulate superannuation?  A ATO  B Superannuation Board of Trustee’s  C AISC  D APRA |

**Part C: Short answer questions**

***Instructions:*** *Answer the following question for 5 points*

|  |  |
| --- | --- |
| 4. | In your own words briefly explain “what is a Government Bond”?  A Government Bond can be purchased from any government. It has an agreed timeframe, principle and interest rate. Government bonds are considered as low risk and can be exchanged between individuals. |

**TOTAL SCORE**: \_\_\_\_\_\_ out of \_\_\_\_\_\_\_ = \_\_\_\_\_\_\_%