

Summative Assessment

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Learner FISA Portfolio Guide

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FURTHER EDUCATION AND TRAINING: GENERIC MANAGEMENT NQF 5 – 59021

ASSESSMENT GUIDE TO NATIONAL QUALIFICATIONS FRAMEWORK

| REVIEW DATE: SEPTEMBER 2024 | SANGE SA PTY LTD |

FURTHER EDUCATION AND TRAINING: GENERIC MANAGEMENT

59021

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ASSESSMENT GUIDE TO NATIONAL QUALIFICATIONS FRAMEWORK

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Learner FISA Portfolio Guide

Final Integrated Summative Assessment

Learner Name and Surname	
Learner ID	
Date	
Learner Signature	

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Learner's Personal Information

Please provide the following information for SAQA National Learner Database. The following page provides the information from codes:

Learner's Last Name		
Learner's First Name (s)		
Learner Title		
Learner birth date (YYYY/MM/DD)		
ID Number (attach a copy of ID)		
Equity code		
Nationality code		
Gender code		
Citizen resident status code		
Home language code		
Socioeconomic status code		
Disability status code		
Learner home address		
Learner postal address		
Province code		
Contact details	Telephone	
	Cell Phone	
	E-mail	
	Fax	
Company Details	Company Name	
	Contact Person (Supervisor)	
	Contact person contact	

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	number	
	Postal Address	
Learner's Designation		
Date of Submission		

Registration Form Codes

Alternative ID type	Equity code	Nationality code	
521 SAQA member ID	BA Black: African	U Unspecified	SEY Seychelles
527 Passport No	BC Black: Coloured	SA South African	ZAI Zaire
529 Driver's License	BI Black: Indian/Asian	SDC SADC except SA	ROA Rest of Africa
531 Temporary ID no	U: Unknown	(i.e. Nam to ZAI)	EUR European countries
533 None	WH: White	NAM Namibia	AIS Asian countries
535 Unknown		BOT Botswana	NOR North American countries
537 Student no		ZIM Zimbabwe	SOU Central & South American countries
538 Work permit no		ANG Angola	AUS Australian & New Zealand
539 Employee no		MOZ Mozambique	OOO Other and rest of Oceania
540 Birth certificate no		LES Lesotho	
541 Human Sciences Research Council register no		SWA Swaziland	
561 ETQA record no		MAL Malawi	
		ZAM Zambia	
		MAU Mauritius	
		TAN Tanzania	
Citizen/residence status	Home language code	Province code	
U Unknown	ENG English	1 - Undefined	
SA South Africa	AFR Afrikaans	2 - Western Cape	
O Other	OTH Other	3 - Eastern Cape	
D Dual (SA plus other)	SEP sePedi	4 - Northern Cape	
	SET seTswana	5 - Free State	
	SWA siSwati	6 - Kwazulu-Natal	

	TSH tshiVenda U Unknown XHO Xhosa XIT xiTsonga ZUL isiZulu NDE siNdebele	7 - North West 8 - Gauteng 9 - Mpumalanga 10 – Limpopo
Disability status		Socioeconomic Status
N None 01 Sight (even with glasses) 02 Hearing (even with hearing aid) 03 Communication (talking, listening) 04 Physical (moving, standing, grasping) 05 Intellectual (difficulties in learning); retardation 06 Emotional (behavioral or psychological) 07 Multiple 08 Disabled but unspecified U Unknown		U Unspecified 01 Employed 02 Unemployed 03 Not working – looking for work 04 Not working – housewife/homemaker 06 Not working – scholar/full time student 07 Not working – pensioner/retired person 08 Not working – disabled person 09 Not working – not wishing to work 10 Not working – none of the above 97 N/A : Aged < 15 98 N/A : Institution

Final Integrated Summative Assessment

“Summative Assessment is assessment for making a judgment about achievement.

This is carried out when a learner is ready to be assessed at the end of the programme of learning”

(SAQA: Criteria and Guidelines for Assessment Policy Document, pg. 26)

Please complete the following Final Integrated Summative Assessment (FISA) activities and submit as part of your Portfolio of Evidence:

- FISA activities and checklists

The learner needs to individually complete the FISA activities. The FISA is conducted by means of integrated workplace activities against the Exit Level Outcomes of the qualification.

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The learner needs to follow the FISA activity instructions to create the evidence required for the portfolio of evidence.



Final Integrated Summative Assessment Activity 1:

The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO2: Monitor and measure performance and apply continuous or innovative improvement interventions in	Core	252027	Devise and apply strategies to establish and maintain workplace relationships.	5	6

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the unit. ELO4: Build relationships with superiors and with stakeholders across the value chain. ELO6: Enhance the development of teams and team members	Core	252037	Build teams to achieve goals and objectives.	5	6
	Core	252020	Create and manage an environment that promotes innovation.	5	6
	Core	252043	Manage a diverse work force to add value.	5	6
	Fundamental	12433	Use communication techniques effectively.	5	6
TOTAL CREDITS:					32

<p>FISA Activity 1: Professional Team Development</p> <p>Individually complete the following in your workplace:</p>	<p>ELO2</p> <p>ELO4</p> <p>ELO6</p>
<p>Complete the following in your workplace and provide workplace evidence to substantiate your answer:</p> <p>You are required to:</p> <ol style="list-style-type: none"> Create a presentation about developing your team. Ensure that your presentation documents contain the following: <ol style="list-style-type: none"> Details about your team: the department in which the team functions, the members of the team and their respective roles and responsibilities Identify and list the goals and objectives of your team Identify a motivational theory that you would use and implement with your team: <ol style="list-style-type: none"> Describe the theory Give specifics of how you will implement the theory with your team Describe how you will promote innovation in your team (be specific about the tasks/activities that you will undertake to achieve this) Describe how you will apply strategies to build relationships in your diverse work team. Do the presentation to a group where your supervisor/manager is present. Request your supervisor to provide you with feedback about your strengths and weaknesses as a presenter. <p>Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.</p>	

Place any extra evidence after this page, clearly marked for easy reference.

FISA Activity 1 Checklist

Please tick that you have submitted the following evidence as per the instructions in the FISA activity (above):

Learner FISA Portfolio Guide

Learner Name		Date	
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FISA Activity 1	Submitted Yes/No	Name of my document / comments
Create a presentation about developing your team. Ensure that your presentation documents contain the following:		
1. Details about your team: the department in which the team functions, the members of the team and their responsibilities.		
2. Identify and list the goals and objectives of your team.		
3. Identify and list the goals and objectives of your team: a. Describe the theory b. Give specifics of how you will use/implement the theory with your team		
4. Describe how you will promote innovation in your team (be specific about the tasks / activities that you will undertake to achieve this)		
5. Describe how you will apply strategies to build relationships in your diverse work team.		
Do the presentation		
6. Do the presentation to a group where your supervisor/manager is present. Request your supervisor to provide you with feedback about your strengths and weaknesses as a presenter		
Learner Signature		Date

Final Integrated Summative Assessment Activity 2:

The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO3: Lead and manage a team of first line managers to enhance individual, team and unit effectiveness. ELO4: Build relationships with superiors and with stakeholders across the value chain ELO6: Enhance the development of teams and team members.	Elective	252031	Apply the principles and concepts of emotional intelligence to the management of self and others	5	4
	Core	252021	Formulate recommendations for a change process	5	8
	Elective	117853	Conduct negotiations to deal with conflict situations	5	8
	Elective	114228	Interpret and manage conflicts within the workplace	5	8
TOTAL CREDITS					28

FISA Activity 2: Professional Conflict & Change Management Individually complete the following in your workplace:	ELO3 ELO4 ELO6
Complete the following in your workplace and provide workplace evidence to substantiate your answer: You are required to: <ol style="list-style-type: none"> Manage and improve emotional intelligence (interpersonal) process through change and conflict management: <ol style="list-style-type: none"> Identify and describe a specific emotional intelligence related problem that is evident in your team, unit/ department e.g. Self-awareness, Self-Regulation, Motivation, Empathy, Social Skills, etc. Identify and describe the problem/ concern Formulate a recommendation to change the problem/ concern Present the recommendation to your team in a team meeting: <ol style="list-style-type: none"> Negotiate and gain agreement from your team members to change the problem/ concern, using your recommendation. Manage and conflicts/ resistance to change during the meeting 	

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- c. Submit the minutes of meeting to prove that you have presented the recommendation, gained agreement and managed any conflict during the meeting.

Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.

Place any extra evidence after this page, clearly marked for easy reference.

FISA Activity 2 Checklist

Please tick that you have submitted the following evidence as per the instructions in the FISA activity (above):

Learner Name	Date
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FISA Activity 2	Submitted Yes/No	Name of my document / comments
Manage and improve emotional intelligence (interpersonal) process through change and conflict management		
1. Identify and describe a specific emotional intelligence related problem that is evident in your team, unit/ department, e.g. Self-awareness, Self-Regulation, Motivation, Empathy, Social Skills, etc.		
2. Identify and describe the problem/concern.		
3. Formulate a recommendation to change the problem/ concern.		
4. Present this recommendation to your team in a team meeting: <ul style="list-style-type: none"> a. Negotiate and gain agreement from your team members to change the problem/ concern, using your recommendation. b. Manage and conflicts/ resistance to change during the meeting 		

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c.	Submit the minutes of meeting to prove that you have presented the recommendation, gained agreement and managed any conflict during the meeting.		
Learner Signature		Date	

Final Integrated Summative Assessment Activity 3:

The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO2: Monitor and measure performance and apply continuous of innovative improvement interventions in the unit ELO3: Lead and manage a team of first time managers to enhance individual, team and unit effectiveness	Core	252029	Lead people development and talent management	5	8
	Core	252034	Monitor and evaluate team members against performance standards	5	8
	Elective	12140	Recruit and select candidates to fill defined positions	5	9
TOTAL CREDITS					28

FISA Activity 3: professional Human Resources Management Individually complete the following in your workplace	ELO2 ELO3
Complete the following in your workplace and provide workplace evidence to substantiate your answer: You are required to:	

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1. Manage the HR activities for your team, unit/department:

- a. Collate and submit all the documentation (policies and procedures, forms, etc.) that you would need to use to recruit and select a new employee.

Reference the documents in the following table:

Name of the document	Where do I get it from	What do I use it for

- b. Collate and submit all the documentation (policies and procedures, forms, etc.) that would need to use to manage the development (talent) of your team members. Reference the documents in the following table:

Name of the document	Where do I get it from	What do I use it for

- c. Collate and submit all the documentation (policies and procedures, forms, etc.) that you would need to use to monitor and evaluate the performance your team members. Reference the documents in the following table:

Name of the document	Where do I get it from	What do I use it for

d. Create and use HR documentation for one of your team members:

- i. Create and submit the job description of this team member
- ii. Create and submit the performance management documentation that you used to monitor and evaluate his/her performance
- iii. Create and submit the development plan for this individual
- iv. Request the individual (team member) to sign and date all the documents to authenticate it as valid.

Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.

Place any extra evidence after this page, clearly marked for easy reference.

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FISA Activity 3 Checklist

Please tick that you have submitted the following evidence as per the instruction in the FISA activity (above):

Learner Name		Date	
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FISA Activity 3	Submitted Yes/No	Name of my document / comments
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Manage the HR activities for your team, unit/ department			
1. Collate and submit all the documentation (policies and procedures, forms, etc.) that you would need to use to recruit and select a new employee. Reference the documents in the table.			
2. Collate and submit all the documentation (policies and procedures, forms, etc.) that would need to use to manage the development (talent) of your team members. Reference the documents in the table.			
3. Collate and submit all the documentation (policies and procedures, forms, etc.) that you would need to use to monitor and evaluate the performance your team members. Reference the documents in the table			
4. Create and use HR documentation for one of your team members: <ul style="list-style-type: none"> a. Create and submit the job description of this member b. Create and submit the performance management documentation that you used to monitor and evaluate his/her performance c. Create and submit the development plan for this individual d. Request the individual (team member) to sign and date all the documents to authenticate it as valid. 			
Learner Signature		Date	

Final Integrated Summative Assessment Activity 4:

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The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO3: Lead and manage a team of first line managers to enhance individual, team and unit effectiveness ELO5: Apply the principles of risk, financial and knowledge management and business ethics within internal and external regulatory frameworks ELO6: Enhance the development of teams and team members	Fundamental	120300	Analyze leadership and related theories in a work context	5	8
	Elective	15224	Empower team members through recognizing strengths, encouraging participation in decision making and delegating tasks	5	4
	Core	252035	Select and coach first line managers	5	8
	Fundamental	252026	Apply a system approach to decision making	5	6
TOTAL CREDITS					26

FISA Activity 4: Professional Management & Leadership Development Individually complete the following in your workplace	ELO3 ELO4 ELO6										
Complete the following in your workplace and provide workplace evidence to substantiate your answer: You are required to: <ol style="list-style-type: none"> Lead and manage your unit, team/department: <ol style="list-style-type: none"> Create a table to identify and list the tasks (at least 2 for each function) that you would do to Plan, Lead, Organize and Control your unit, team/ department <table border="1" style="width: 100%;"> <thead> <tr> <th>Management Function</th><th>My tasks</th></tr> </thead> <tbody> <tr> <td>Plan</td><td></td></tr> <tr> <td>Lead</td><td></td></tr> <tr> <td>Organize</td><td></td></tr> <tr> <td>Control (monitor)</td><td></td></tr> </tbody> </table> Select a specific leadership theory that you can implement with your unit, team/ department. Summarize the leadership leadership theory and then describe how you would implement it with your specific team. 		Management Function	My tasks	Plan		Lead		Organize		Control (monitor)	
Management Function	My tasks										
Plan											
Lead											
Organize											
Control (monitor)											

2. Coach a first line manager (supervisor):
 - a. Identify the issue/ problem that exists related to the supervisor that needs coaching.
 - b. Submit documentation to prove that you have used a problem solving technique to identify possible solutions to the problem.
 - c. Submit a coaching plan (tasks, resources, dates) of the coaching that you will do with the first line manager
 - d. Do the coaching and request the coaches (first line manager that you have coached) to provide you with written feedback about his/her experience of being coached by you.

Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.

Place any extra evidence after this page, clearly marked for easy reference.

FISA Activity 4 Checklist

Please tick that you have submitted the following evidence as per the instruction in the FISA activity (above):

Learner Name	Date
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FISA Activity 4	Submitted Yes/No	Name of my document / comments
Lead and manage your team, unit/ department		
1. Create a table to identify and list the tasks (at least 2 for each function) that you would do to Plan, Lead, and organize and Control your unit, team/ department.		
2. Select a specific leadership theory that you can implement with your unit, team/ department. Summarize the leadership theory and then describe how you would implement it with your specific team.		
Coach a first line manager (supervisor)		
3. Identify the issue/ problem that exists related to the supervisor that needs coaching		
4. Submit documentation to prove that you have		

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used a problem solving technique to identify possible solutions to the problem		
5. Submit a coaching plan (tasks, resources, dates) of the coaching that you will do with the first line manager		
6. Do the coaching and request the coaches (first line manager that you have coached) to provide you with written feedback about his/her experience of being coached by you.		
Learner Signature		Date

Final Integrated Summative Assessment Activity 5:

The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO3: Apply the principles of risk, financial and knowledge management and business ethics within internal and external regulatory frameworks	Fundamental	252042	Apply the principles of ethics to improve organizational culture	5	5
	Core	252044	Apply the principles of knowledge management	5	6
	Fundamental	252036	Apply mathematical analysis to economic and financial information	5	6
	Fundamental	252040	Manage the finances of a unit	5	8
TOTAL CREDITS					25

FISA Activity 5: Financial Management for Professionals	ELO5
Individually complete the following in your workplace	
Complete the following in your workplace and provide workplace evidence to substantiate your answer: You are required to:	
1. Manage the finance of your unit, team/department: <ol style="list-style-type: none"> Create and submit a budget for your unit, team / department. Request your supervisor to sign off and date the budget that you created to show that the budget fulfills the organizational requirements Submit all the documents that you used in order to gather information to create your budget Identify and list at least 2 principles of ethics that you would apply when managing the finances 	

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- of your unit
- e. Describe how you have implemented these 2 principles in creating, managing and controlling the budget.

Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.

Place any extra evidence after this page, clearly marked for easy reference.

FISA Activity 5 Checklist

Please tick that you have submitted the following evidence as per the instruction in the FISA activity (above):

Learner Name	Date
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FISA Activity 4	Submitted Yes/No	Name of my document / comments
Manage the finance of your team, unit/ department		
1. Create and submit a budget for your unit, team/ department.		
2. Request your supervisor to sign off and date the budget that you created to show that the budget fulfills the organizational requirements		
3. Submit all the documents that you used in order together information to create a budget		
4. Identify and list at least 2 principles of ethics that you would apply when managing the		

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finance of your unit			
5. Describe how you have implemented these 2 principles in creating, managing and controlling the budget.			
Learner Signature		Date	

Final Integrated Summative Assessment Activity 6:

The learner is required to show applied competence against the following qualification assessment criteria related to:

ELO	Unit Standard				
	Type	NLRD	Title	NQF	Credits
ELO1: Initiate, develop, implement and evaluate operational strategies, projects and action plans so as to improve the effectiveness of the unit ELO5: Apply the principles of risk, financial and	Fundamental	252022	Develop, implement and evaluate a project plan	5	8
	Core	252032	Develop, implement and evaluate an operational plan	5	8
	Elective	252024	Evaluate current practices against best practice	5	4
	Core	252025	Monitor, assess and manage risk	5	8

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knowledge management and business ethics within internal and external regulatory frameworks					
TOTAL CREDITS					25

FISA Activity 6: Professional Results-based Management – Planning, Monitoring & Evaluation Individually complete the following in your workplace	ELO1 ELO5
Complete the following in your workplace and provide workplace evidence to substantiate your answer: You are required to: <ol style="list-style-type: none"> Create an operational plan that you can use to implement your team/ departments operational goals: <ol style="list-style-type: none"> Define the team/ department’s goals and objectives Create and submit the plan, like you would a project plan, to implement specific tasks that you and your team members need to do, Provide the tasks, resources required and due dates for the tasks to be completed Describe how you have used best practices in defining your team’s goals and objectives and/or in creating the project/ operational plan Identify and list at least 2 risks that you need to manage during the implementation of your plan. Highlight at least 2 tasks in your plan that will assist you to manage/ mitigate/ minimize the risks you identified. <p>Remember. Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.</p>	

Place any extra evidence after this page, clearly marked for easy reference.

FISA Activity 6 Checklist

Please tick that you have submitted the following evidence as per the instruction in the FISA activity (above):

Learner Name		Date	
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FISA Activity 6		Submitted Yes/No	Name of my document / comments
Create an operational plan that you can use to implement your team/ departments operational goals			
1. Define the team/ department's goals and objectives			
2. Create and submit the plan, like you would a project plan, to implement specific tasks that you and your team members need to do. Provide the tasks, resources required and due dates for the tasks to be completed			
3. Describe how you have used best practices in defining your team's goals and objectives and/or in creating the project/ operational plan.			
4. Identify and list at least 2 risks that you need to manage during the implementation of your plan.			
5. Highlight at least 2 tasks in your plan that will assist you to manage/ mitigate/ minimize the risks you identified.			
Learner Signature		Date	