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| Summative Assessment Instrument |
| ***Module 4***  **NATIONAL Certificate:**  **GENERIC MANAGEMENT**  **59201**  **GENERIC MANAGEMENT**  **(LP60269)**  **Skills Program 4-Unit Management** |

**Module Credit Total: 52**

**SECTION 2: SUMMATIVE ASSESSMENT INSTRUMENT**

**Learner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**ID Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Welcome to your Summative Assessment!**

This document deals with the summative assessment of your competence towards the outcomes which you need to achieve. “Summative Assessment is assessment for making a judgement about achievement. This is carried out when a learner is ready to be assessed at the end of a programme of learning” (SAQA: Criteria and Guidelines for Assessment Policy Document, pg 26).

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**Module 4: Unit Standard Cluster Information**

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| --- | --- | --- | --- |
| **SAQA** | **Unit Standard Title** | **Level** | **Credits** |
| 252022 | Develop, implement and evaluate a project plan | 5 | 8 |
| 252040 | Manage the finances of a unit | 5 | 8 |
| 114212 | Explain the impact of organisational wellness on a business environment and indicate a strategy for a business unit | 4 | 3 |
| 12140 | Recruit and select candidates to fill defined positions | 5 | 9 |
| 252033 | Demonstrate ways of dealing with the effects of dread diseases and in particular HIV/AIDS | 5 | 8 |
| 114226 | Interpret and manage conflicts within the workplace | 5 | 8 |
| 15230 | Monitor team members and measure effectiveness of performance | 5 | 4 |
| 15224 | Empower team members through recognising strengths | 5 | 4 |

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| **Instructions & Memorandum of Assessment** |

You will be required to complete the following sections of this document which forms part of your overall formative assessment.

**Section 1: Formative Assessment**

* 1. **Classroom: Formative Knowledge Questionnaire**

These knowledge based questions will be based on the outcomes and content of your classroom training session. Please answer all the questions provided as this will also form part of your portfolio of evidence.

* 1. **Classroom: Practical Assessment Activities and Assignments**

These activities will be completed during the classroom or facilitation session and can be found in the learning material.

**SECTION 2: Summative Assessment**

“Summative Assessment is assessment for making a judgement about achievement. This is carried out when a learner is ready to be assessed at the end of a programme of learning” (SAQA: Criteria and Guidelines for Assessment Policy Document, pg 26).

Your Summative Assessment consists of:

* 1. **Observational Assessment and Workplace Assignments**

To be completed in the workplace by your facilitator and / or assessor based on your performance at the end of the course.

* 1. **Summative Knowledge Assessment**

Please complete the assignment by following the instructions provided.

* 1. **Personal Narrative**

The personal narrative offers a chance for you to reflect on the requirements of the required outcomes and reflexive competence in the application of the learning.

* 1. **Witness Testimony**

The witness testimony consists of a testimonial based on your performance as observed / reviewed by your Supervisor / Manager in the workplace.

* 1. **Logbook**

Please complete the Log Book by following the instructions provided.

**LEARNER ASSESSMENT PLAN**

***Please tick next to the unit standards you are being assessed against.***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Unit code** | **UNIT STANDARD TITLES** | **NQF level** | **Credits** |  |
| 252022 | Develop, implement and evaluate a project plan | 5 | 8 |  |
| 252040 | Manage the finances of a unit | 5 | 8 |  |
| 114212 | Explain the impact of organisational wellness on a business environment and indicate a strategy for a business unit | 4 | 3 |  |
| 12140 | Recruit and select candidates to fill defined positions | 5 | 9 |  |
| 252033 | Demonstrate ways of dealing with the effects of dread diseases and in particular HIV/AIDS | 5 | 8 |  |
| 114226 | Interpret and manage conflicts within the workplace | 5 | 8 |  |
| 15230 | Monitor team members and measure effectiveness of performance | 5 | 4 |  |
| 15224 | Empower team members through recognising strengths | 5 | 4 |  |

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| --- | --- | --- | --- |
| **Activity** | **Evidence of activity will be found where** | **Place & planned date of activity** | **Date**  **Completed** |
| Training | Classroom training registers | Training Provider  Date: |  |
| Self assessment | Assessment contract signed & dated | Learner file  Date: |  |
| Assessment contract | Assessment contract signed & dated | Learner file  Date: |  |
| Initial meeting | Assessor briefing checklist | Learner file  Date: |  |
| Unit Standard No | Assessment contract & assessment plan | Learner file  Date: |  |
| Formative Assessment | Assessment instruments | Learner file  Date: |  |
| Summative Assessment | Assessment instruments | Learner file  Date: |  |
| Other Evidence | Research portfolio (if applicable) | Learner file  Date: |  |
| Feedback | Feedback Report | Learner file  Date: |  |
| Moderation | Moderators report | Learner file  Date: |  |
| Judgement | Assessor Summary Report / Moderator report | Learner file  Date: |  |
| 1st Reassessment | Assessors summary report / instruments | Learner file  Date: |  |
| 2nd Reassessment | Assessors summary report / instruments | Learner file  Date: |  |

**Special arrangements for assessment**

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| --- |
| Place |
| Language |
| Resources |
| Barriers |

**People to be involved with assessment**

|  |  |
| --- | --- |
| Learner: | Manager: |
| Trainer: | Mentor / Coach: |
| Assessor: | Moderator: |

**Next steps for learning**

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**Resources required for this assessment**

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**Guidelines to the learner:**

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Learners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Learner’s signature: Date:

Assessors Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assessor’s signature: Date:

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| |  | | --- | | **ASSESSMENT APPEALS PROCEDURE** |   1. A learner has the right to appeal under the following circumstances   * If the laid down assessment procedures were not followed during assessments * If not all evidence available was taken into account during the assessment * The assessor was not a subject matter expert or did not have a subject matter expert during the assessment process * The assessor did not assess according to the performance criteria and range statement stipulated in the unit standard * Not all the range items were available for assessment   2. A learner bringing an appeal against a decision of the assessment will lodge such an appeal with the assessor and the internal moderator within 2 days of the assessment feedback session.  3. A learner bringing an appeal should complete the “Learner’s Notice of Assessment Appeal “form before the Appeal Hearing. The form should be handed to the internal moderator or a representative of the SETA.  4. Should the internal moderator re-affirm the assessor’ decision, the learner may appeal to the external verifier within 2 days after the initial moderator’s feedback session. The external verifier’s decision will be final. Should the external verifier re-affirm the assessors’ decision, the cost for re-evaluation will be upon the learner. Should the verifier’s decision differ from the assessor’s decision, the cost for re-evaluation will be borne by the assessor. |

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| **ASSESSMENT APPEAL APPLICATION FORM** |

**LEARNER’S NOTICE OF ASSESSMENT APPEAL**

**TO: The Internal Moderator**

A meeting with the internal moderator is hereby requested to discuss the outcome of my assessment.

Internal moderator name

Date of submission:

Name of employee assessed:

Name of Assessor:

Date of feedback session:

**Grounds for Appeal**

|  |  |  |
| --- | --- | --- |
| **No** | **Tick the applicable ground(s) for appeal** | **Tick** |
| 1 | The assessment did not follow the laid down procedure |  |
| 2 | Not all evidence available was taken into account during the assessment |  |
| 3 | The assessor was not a subject matter expert nor was a subject matter expert present during the assessment process |  |
| 4 | The assessment was not according to the performance criteria and the range statement stipulated in the unit standard |  |
| 5 | Not all the range items were available for the assessment |  |

**Reasons for Appeal**

|  |  |
| --- | --- |
| **No** | **Please give detailed reasons for the choice(s) above** |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

Learner’s signature: Date:

Employee witness: Date:

|  |
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| **PRE-ASSESSMENT MEETING CHECKLIST** |

**Points Assessor must cover in the initial meeting with the learner - Please tick**

| **Item** | **Points to be covered** | **Tick** |
| --- | --- | --- |
| 1 | Welcomethe candidate **and put them at ease** |  |
| 2 | **Explain the purpose of the meeting** (why you are there and how long the meeting will take) |  |
| 3 | **Explain the**   * NQF * Credits * Certification process * Learning pathways |  |
| 4 | **Explain**   * Who is involved in the assessment and their role (learners, coach, assessors, managers, moderators) * Principles of assessment (fairness, confidentiality, validity, sufficiency) |  |
| 5 | **Explain the assessment process?**   * Check learner readiness for assessment (logbook / self assessment) * Assessment contract to be completed * Preparation of learner (this meeting) * The assessment (observation and knowledge questionnaire) * Judgement of the evidence * Outcome of assessment (competent, not yet competent, need further evidence) |  |
| 6 | **Give Learner copies of the following documentation and explain each document**   * The Assessment Guide which includes   + The relevant unit standard (s)   + Assessment contract   + Assessment plan   + Observation checklist   + Knowledge checklist |  |
| 7 | **Discuss the assessment plan** (complete the assessment plan document)   * Allow the learner to participate in the decisions made * Agree on dates, time and venue for the assessment and feedback * Agree on evidence the learner can submit * Agree and explain the assessment methods * Identify and discuss special assessment needs of the candidate * Identify and eliminate unfair barriers (language, disability etc) * Discuss and agree on witness requirements |  |
| 8 | **Tell the candidate his/her rights and responsibilities, the assessment procedures and policies**   * How many times they may be assessed * Appeals process / procedure * Reassessment policy |  |
| 9 | **Ensure the assessment environment is appropriate** or make special arrangements |  |
| 10 | Discuss moderation |  |
| 11 | Allow the learner opportunity to clarify any items discussed |  |

|  |  |
| --- | --- |
| Learner declaration of acceptance of assessment instruments and relevant documentation: Date: | |
| Learners Name: | Signature |
| Assessors Name: | Signature: |

**SUMMATIVE ASSESSMENT**

* 1. **kNOWLEDGE QUESTIONAIRE**

**Instructions to the Learner:** The following questions must be answered in filled giving examples where asked. Please read all the questions carefully and take time to consider your answer before recording it.

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| --- |
| UNIT STANDARD: 252022 - DEVELOP, IMPLEMENT AND EVALUATE A PROJECT PLAN |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. The assessor can make reference to formative assessment evidence where available.

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| **US REFERENCE: SO 1 AC 1** |

1. Describe the methods and techniques that could be used for the planning and implementation of projects. Make use of examples to explain your answer.

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| Methods |
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| Techniques |
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| **Research activity – Workplace Project**  Instructions: Conduct research in your workplace to gather information and report on the following tasks. |

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| **US REFERENCE: SO 1 AC 2** |

1. Describe a project alternative to a current project that you are working on in the workplace. Also list the advantages and disadvantages (in terms of viability, costs & results) of the suggested alternative.

|  |  |
| --- | --- |
| Current project: | |
| Project alternatives suggested: | |
| Advantages *(In terms of viability, costs & results)* | Disadvantages *(In terms of viability, costs & results)* |
|  |  |
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| **US REFERENCE: SO 2 AC 1** |

1. Describe the scope of the work and deliverables of your department’s objectives.

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| --- |
| Scope: |
| Deliverables: |

|  |
| --- |
| **US REFERENCE: SO 2 AC 2** |

1. Describe the principal work activities which are required to achieve your department’s objectives.

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| **US REFERENCE: SO 2 AC 3** |

1. Describe the potential risks (injuries, losses, accidents etc) involved in completing the principal work activities and explain the likelihood of these risks actually occurring in the workplace.

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| **US REFERENCE: SO 2 AC 4** |

1. Describe the change processes which are essential to the project’s (work activities) success.

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| **US REFERENCE: SO 3 AC 1** |

1. Describe the overall objectives of a project plan.

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| **US REFERENCE: SO 3 AC 2** |

1. Describe the contributions required by the following stakeholders to ensure that the project is a success.

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| --- |
| The sponsor: |
| The project team: |

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| **Design a WBS – Work breakdown structure**  Instructions: Conduct research in your workplace to gather information on your project’s main activities in order to design a work breakdown structure. |

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| **US REFERENCE: SO 1 AC 2** |

1. Design a work breakdown structure to identify the main activities required for you to complete a current project in your workplace.

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| --- | --- |
| Current project: | |
| Project objectives: | |
| **Main activities required to complete project in order of priority** | |
| Main activities | Priority level *(1,2,3,4,5,5 etc)* |
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| UNIT STANDARD: 252040 Manage the finances of a unit |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. The assessor can make reference to formative assessment evidence where available.

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| **Research Project**  Conduct research to determine the best way in which to illustrate the accounting cycle in a diagram. You may record / draw your diagram below in the space provided or attach a diagram produced on a computer. |

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| **US REFERENCE: SO 1 AC 1** |

1. The accounting cycle.

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| **US REFERENCE: SO 1 AC 2** |

1. Explain the role of budgeting and forecasting in the strategic planning process. Make use of an example to explain your answer.

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| **US REFERENCE: SO 1 AC 3** |

1. Explain the following accounting conventions applied in the financial management of a unit / department. Make use of practical examples from your department to explain your answer.

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| --- |
| Consistency: |
|  |
| On-going concern: |
|  |
| Prudence: |
|  |
| Realisation: |
|  |
| Disclosure: |
|  |
| Objectivity: |
|  |
| Matching: |
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| **US REFERENCE: SO 1 AC 4** |

1. Explain the purpose of the following reports used by your organisation.

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| Audit reports: |
|  |
| Income statements: |
|  |
| Cash flow statement: |
|  |
| Balance statement: |
|  |

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| **US REFERENCE: SO 3 AC 1** |

1. Identify the two (2) different types and formats of financial forecasts. Make use of examples to explain your answer.

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| **US REFERENCE: SO 3 AC 2** |

1. Identify the sources of financial forecasts as per the entity's standard practice.

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| **US REFERENCE: SO 3 AC 3** |

1. Identify the key factors required to effectively prepare financial forecasts.

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| UNIT STANDARD: 114212 Explain the impact of organizational wellness on a business environment and indicate a strategy for a business unit |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked.

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| **US REFERENCE: SO1 AC1** |

1. List five (5) factors that can impact on wellness in a business environment?

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| **US REFERENCE: SO1 AC1** |

1. Explain the positive or negative impact of each one of the five factors which you have identified.

|  |  |
| --- | --- |
| Factor 1 | |
|  | |
| Positive | Negative |
|  |  |
| Factor 2 | |
|  | |
| Positive | Negative |
|  |  |
| Factor 3 | |
|  | |
| Positive | Negative |
|  |  |
| Factor 4 | |
|  | |
| Positive | Negative |
|  |  |
| Factor 5 | |
|  | |
| Positive | Negative |
|  |  |

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| **US REFERENCE: SO1 AC2** |

1. Explain how the contribution of norms and values ad to the wellness of an organisation. Make use of an example to explain your answer.

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| **US REFERENCE: SO1 AC3** |

1. Explain how the following organisational support systems could increase the wellness of an organisation.

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| Conflict resolution policies and procedures |
|  |
| Effective communication systems |
|  |
| Rewards and recognition systems |
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| Resource availability |
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| **US REFERENCE: SO1 AC4** |

1. Explain the impact of the lack of peer support on a organisation.

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| **US REFERENCE: SO1 AC5** |

1. Explain the concept of “company climate” with reference to sense of community, positive outlook and shared vision. Make use of an example to explain your answer.

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| UNIT STANDARD: 12140 RECRUIT AND SELECT CANDIDATES TO FILL DEFINED POSITIONS |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. You will need to answer the questions in line with the operating procedures of the packaging machine in use in your organisation.

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| **Essential Embedded Knowledge** |

1. Give examples of and describe the relevant legislation relevant to the recruitment of candidates in your organisation.

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| **Essential Embedded Knowledge** |

1. Describe why it is important for you to have an in depth understanding of the industry in which you plan to recruit staff into. Make use of examples to explain your answer.

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| UNIT STANDARD: 252033 Demonstrate ways of dealing with the effects of dread diseases and in particular HIV/AIDS |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked.

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| **US REFERENCE: SO1 AC1** |

1. Explain the definition of dread diseases.

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| **US REFERENCE: SO1 AC2** |

1. Give examples of at least three (3) different dread diseases and explain how each can be transmitted.

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| Disease A |
|  |
| Transmission |
|  |
| Disease B |
|  |
| Transmission |
|  |
| Disease C |
|  |
| Transmission |
|  |

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| **US REFERENCE: SO1 AC3** |

1. Give examples of common “untruths” or misconceptions about some of the dread diseases mentioned above.

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| **US REFERENCE: SO2 AC1** |

1. List examples of law or legislation that addresses the rights of people affected by dread diseases. Make use of examples to explain your answer.

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| **US REFERENCE: SO2 AC2** |

1. Explain the current legislation in terms of the privacy and confidentiality rights of the affected persons. Make use of examples to explain your answer.

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| **US REFERENCE: SO2 AC3** |

1. Give at least two (2) examples of unfair dismissals relating to dread diseases.

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| **US REFERENCE: SO2 AC4** |

1. Explain the procedures in place in your organisation to deal with unfair discrimination in the workplace.

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| **US REFERENCE: SO3 AC1** |

1. Explain the possible impact that dread diseases could have on the performance of a business.

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| UNIT STANDARD: 114226 – Interpret and manage conflicts within the workplace |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. The assessor can make reference to formative assessment evidence where available.

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| **Specific Outcome 1: Describe the main sources of conflict.** |

**Assessment Criteria**

**1.1** List possible sources of conflict, including perceptions and assumptions with examples of where they are most likely to occur.

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**1.2** Explain the positive and negative characteristics of conflict in the workplace by giving examples to explain your answer.

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**1.3** Explain the organisational conflict modes by using examples.

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**1.4** Describe conflict, which may arise in personality types, through using transactional analysis.

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| **Specific Outcome 2:** **Explain appropriate techniques in conflict management.** |

**Assessment Criteria**

**2.1** Explain the various business conflict modes by using examples to explain your answer.

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**2.2**. List possible useful steps to be taken to manage conflict by using examples to explain your answer.

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**2.3**. Describe the route which conflicts normally follow toward resolution by making use of examples to explain your answer.

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| **Specific Outcome 3:** **Describe the appropriate action plan and strategies to manage conflict.** |

**Assessment Criteria**

**3.1** List which methods are available for use to resolve conflict in terms of the Labour Relations Act.

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**3.2** List the most appropriate strategy which could be used to resolve a particular conflict is and then explain why you have selected that particular choice of strategy.

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**3.3** Explain the role of policies and procedures in place in your organisation to prevent and/or resolve conflicts.

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| **Specific Outcome 4: Explain the attributes of an effective conflict manager.** |

**4.1** List the personal attributes of a good conflict manager with examples of how each characteristic contributes to conflict resolution.

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**4.2** List the negative attributes which should be avoided or controlled by an effective conflict manager and explain what negative effect each has on the resolution of conflict.

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| UNIT STANDARD: 15230 Monitor team members and measure effectiveness of performance |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. The assessor can make reference to formative assessment evidence where available.

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| **US 15230 SO1 AC 1** |

1. Make use of your organisation’s business plan and organisational standards to set performance standards for your department. (Attach a sample of the business plan here) \* Ensure that these standards are clear and concise.

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| --- |
| **Activity:** |
| **Performance Standard Description:** |
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| **Activity:** |
| **Performance Standard Description:** |
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| **Activity:** |
| **Performance Standard Description:** |
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| **US 15230 REF: SO 1 AC 1** |

1. Identify the typical functions, activities and information systems which you will monitor to ensure optimum performance.

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| **Functions:** | **Performance Monitoring System** |
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| **Activities:** |  |
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| **Information Systems:** |  |
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| **US 15230 REFERENCE: SO 2 AC 4** |

1. Describe the methods used to receive and give both positive and negative feedback in a constructive manner.

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| **US 15230 REFERENCE: SO 4** |

1. Describe possible problems which you could experience when monitoring performances. Suggest suitable solutions to overcome each problem.

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| **Possible Problem** | **Solution** |
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| UNIT STANDARD: 15224 EMPOWER TEAM MEMBERS THROUGH RECOGNISING STRENGTHS, ENCOURAGING PARTICIPATION IN DECISION MAKING AND DELEGATING TASKS |

**Instructions to the Assessor:** The following questions must be answered in filled giving examples where asked. The assessor can make reference to formative assessment evidence where available.

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| **US REFERENCE: SO1 AC 1** |

1. Explain the role, duties and responsibilities of each team member in the section / division / department together with the level of performance expected of them and an indication of how they fit into the work of the section.

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| **US REFERENCE: SO 1 AC 2** |

1. Explain the motivational theories by Mazlow and Herzberg.

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| **US REFERENCE: SO 1 AC 3** |

1. Identify and explain brainstorming techniques. Make use of an example to explain your answer.

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| **US REFERENCE: SO 1 AC 4** |

1. Identify and explain negotiation techniques. Make use of an example to explain your answer.

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| **US REFERENCE: SO 1 AC 5** |

1. Describe feedback techniques which are followed and implemented in your organisation.

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FOR ASSESSOR

File Checked:

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| Date | Assessor Signature |
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This is to verify that the learner has completed all the above and has achieved competence.

Assessor Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Assessor Reg. No:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assessor Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This is to verify that the assessor has observed me in the workplace.  
  
Learners Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learners Reg No:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Learners Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. **Observation ASSESSMENT**

This Observation Assessment will be completed by the facilitator/assessor based on the learner’s performance.

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| UNIT STANDARD: 252022 - DEVELOP, IMPLEMENT AND EVALUATE A PROJECT PLAN |

The assessor to complete the following:

Remember to cover all range items!!!!!!

Assessor to write observations or make clear references to evidence attached in the spaces provided.

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| **US REFERENCE: SO 3 AC 4** |

1. The project activities, required performance levels and quality criteria are stipulated and communicated to team members and other stakeholders to promote quality and effectiveness.

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| **US REFERENCE: SO 3 AC 5** |

1. The project plan is checked for accuracy, completeness and compliance to internal and external requirements.

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| **US REFERENCE: SO 4 AC 1** |

1. A Gantt chart is developed for managing and evaluating the time dimension.

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| **US REFERENCE: SO 4 AC 2** |

1. A budget is developed for managing and evaluating the cost dimension.

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| **US REFERENCE: SO 4 AC 3** |

1. Quality parameters are developed for managing and evaluating quality.

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| **US REFERENCE: SO 4 AC 4** |

1. The measurement tools are communicated to team members to promote a common understanding of requirements.

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| **US REFERENCE: SO 5 AC 1** |

1. Project implementation is monitored and evaluated against the plan, the stipulated performance criteria and quality requirements.

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| **US REFERENCE: SO 5 AC 2** |

1. Project results are monitored to establish progress and effectiveness.

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| **US REFERENCE: SO 5 AC 3** |

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| 1. Deviations from the project plan are identified and analyzed in order to take corrective action. |
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| **US REFERENCE: SO 5 AC 4** |

1. Corrective actions are implemented to ensure the achievement of project objectives.

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| **US REFERENCE: SO 5 AC 5** |

1. Results are evaluated against the scope and objectives of the project.

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| UNIT STANDARD: 252040 Manage the finances of a unit |

The assessor to complete the following:

Remember to cover all range items!!!!!!

Assessor to write observations or make clear references to evidence attached in the spaces provided.

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| **US REFERENCE: SO 2 AC 1** |

1. Financial statements are analysed, using data sources identified and evaluated for authenticity and accuracy.

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| **US REFERENCE: SO 2 AC 2** |

1. The ratios are applied to measure the profitability and liquidity of an entity.

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| **US REFERENCE: SO 2 AC 3** |

1. The ratios are applied to measure the working capital and asset utilisation of an entity.

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| **US REFERENCE: SO 2 AC 4** |

1. The ratios are applied to measure the return of an entity. Range: return on equity, return on investment and debt ratio.

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| **US REFERENCE: SO 2 AC 6** |

1. Recommendations are made regarding the profitability of, liquidity, working capital, return and resource utilisation by the entity using the results obtained from the application of the ratios.

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| **US REFERENCE: SO 3 AC 4** |

1. Relevant factors are incorporated in the preparation of financial forecasts.

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| **US REFERENCE: SO 3 AC 5** |

1. Financial forecasts are analysed to determine viability against the entity's requirements.

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| **US REFERENCE: SO 4 AC 1** |

1. Budget plans are linked to operational objectives.

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| **US REFERENCE: SO 4 AC 2** |

1. Operational objectives are established in line with the unit's strategic plan.

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| **US REFERENCE: SO 4 AC 3** |

1. The budget is formulated according to standard operating procedures.

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| **US REFERENCE: SO 4 AC 4** |

1. Drafted budget is reviewed, reflected on and modified to ensure alignment to the operational plan of the unit.

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| **US REFERENCE: SO 5 AC 1** |

1. Monitoring systems are agreed and adhered to, according to standard operating procedures.

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| **US REFERENCE: SO 5 AC 2** |

1. Expenditure reports are monitored for the year for each team within the unit against given criteria.

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| **US REFERENCE: SO 5 AC 3** |

1. Corrective actions are implemented where necessary in accordance with the entity's policies and procedures.

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| UNIT STANDARD: 114212 Explain the impact of organizational wellness on a business environment and indicate a strategy for a business unit |

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| **US REFERENCE: SO2 AC1** |

1. The factors to be included in a corporate wellness culture survey are identified to determine the impact of organisational wellness on a business unit.

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| **US REFERENCE: SO2 AC 2** |

1. A questionnaire is designed or adapted to measure the wellness culture in a specific organisation.

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| **US REFERENCE: SO2 AC 3** |

1. Information relating to corporate wellness is analysed and interpreted and a written report is produced with reference to values and norms, organisational support, peer support and climate.

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| **US REFERENCE: SO2 AC 4** |

1. Recommendations are made to improve organisational wellness in a specific organisation.

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| **US REFERENCE: SO4 AC1** |

1. The key issues to be addressed in a wellness strategy are identified and substantiated based on research.

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| **US REFERENCE: SO4 AC2** |

1. One issue is selected and a strategy is developed to implement change in the business unit with reference to communication, implementation, reward and evaluation.

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| UNIT STANDARD: 12140 RECRUIT AND SELECT CANDIDATES TO FILL DEFINED POSITIONS |

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| **US REFERENCE: SO 1 AC 1** |

1. Information is obtained on the position that is relevant and complete.

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| **US REFERENCE: SO 1 AC 2** |

1. A selection procedure is selected or designed and is ensured to be appropriate for the specific position and in line with organisational and legal requirements.

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| **US REFERENCE: SO 1 AC 3** |

1. The selection procedure is confirmed to be a validated procedure.

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| **US REFERENCE: SO 1 AC 4** |

1. Resources and methods needed for recruitment and selection are identified and budgets prepared and managed. The resources are available, within budget and fit for purpose.

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| **US REFERENCE: SO 1 AC 5** |

1. Selection criteria and control procedures are developed in line with organisational and legal requirements, and avoid partiality or bias.

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| **US REFERENCE: SO 1 AC 6** |

1. A plan is developed that ensures effective and efficient recruitment and selection.

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| **US REFERENCE: SO 2 AC 1** |

1. Recruitment is conducted in accordance with the plan and in such a way as to have the potential to elicit the desired response from the target market.

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| **US REFERENCE: SO 2 AC 2** |

1. Responses are dealt with in accordance to planned control procedures.

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| **US REFERENCE: SO 2 AC 3** |

1. The initial screening determines if applicants meet the critical job specifications and requirements to expedite the departure of unsuitable applicants.

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| **US REFERENCE: SO 2 AC 4** |

1. Implementation of corrective action following the evaluation of the initial recruitment plan, if the initial screening does not elicit desired responses.

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| **US REFERENCE: SO 2 AC 5** |

1. A list of potential candidates is prepared to facilitate selection.

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| **US REFERENCE: SO 2 AC 6** |

1. An applicant database is managed in accordance with legislation and organisational requirements.

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| **US REFERENCE: SO 2 AC 7** |

1. Unplanned events are dealt with in accordance with the circumstances and contingency plans are initiated.

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| **US REFERENCE: SO 3 AC 1** |

1. Backgrounds and qualifications are validated using appropriate verification methods according to the plan.

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| **US REFERENCE: SO 3 AC 2** |

1. Candidates are assessed against the requirements of the defined position.

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| **US REFERENCE: SO 3 AC 3** |

1. Candidates are interviewed using best practice techniques appropriate to the defined position.

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| **US REFERENCE: SO 3 AC 4** |

1. A shortlist is drawn up to reflect the results of the assessment of candidates. The shortlist can be justified in terms of the match between candidate profile and job requirements.

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| **US REFERENCE: SO 3 AC 5** |

1. Selections are made in accordance with planned strategy and can be justified in terms of best match between candidate profile and job and organisation requirements and meeting legislative requirements.

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| **US REFERENCE: SO 3 AC 6** |

1. Feedback is relevant to the enquiry and the job requirements, and is given to both successful and unsuccessful candidates tactfully according to the planned time framework and legal requirements.

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| **US REFERENCE: SO 3 AC 7** |

1. Records are documented to facilitate further processing and reflect agreements reached and successful candidate details accurately. Records are authorised and forwarded to designated personnel.

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| **US REFERENCE: SO 3 AC 8** |

1. Unplanned events are dealt with in accordance with the circumstances, and contingency plans are initiated.

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| UNIT STANDARD: 252033 Demonstrate ways of dealing with the effects of dread diseases and in particular HIV/AIDS |

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| **US REFERENCE: SO AC** |

1. Findings and recommendations are compiled in a report.

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| **US REFERENCE: SO AC** |

1. An action plan is developed to implement the recommendations for dealing with the impact of dread diseases in the unit.

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| UNIT STANDARD: 114226 – Interpret and manage conflicts within the workplace |

The assessor to complete the following:

Remember to cover all range items!!!!!!

Assessor to write observations or make clear references to evidence attached in the spaces provided.

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| **Specific Outcome 3:** **Describe the appropriate action plan and strategies to manage conflict.** |

**Assessment Criteria**

**3.1** The need to adopt action plans and adapt them to a particular conflict is demonstrated with examples.

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| **Specific Outcome 4:** |

**Assessment Criteria**

**4.1**  A skills audit is done by the learner to identify the skills he/she needs to develop to be an effective conflict manager are identified.

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| UNIT STANDARD: 15230 Monitor team members and measure effectiveness of performance |

The assessor to complete the following:

Remember to cover all range items!!!!!!

Assessor to write observations or make clear references to evidence attached in the spaces provided.

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| **US 15230 REFERENCE: SO 1 AC 2** |

1. Performance standards are agreed in consultation with the relevant individuals.

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| **US 15230 REFERENCE: SO 1 AC 4** |

1. Performance standards are recorded and documented.

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| **US 15230 REFERENCE: SO 1 AC 5** |

1. Systems for monitoring performance against standards are set up.

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| **US 15230 REFERENCE: SO 2 AC 1** |

1. Time, place and format for performance review are agreed with team member.

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| **US 15230 REFERENCE: SO 2 AC 2** |

1. Preliminary assessment of performance against the agreed standards is conducted using monitoring systems.

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| **US 15230 REFERENCE: SO 2 AC 3** |

1. Performance against standards is documented in a form that is usable in future.

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| **US 15230 REFERENCE: SO 3 AC 1** |

1. Time, place and format are in accordance with that previously agreed.

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| **US 15230 REFERENCE: SO 3 AC 2** |

1. Positive and negative performance is documented for report back purposes.

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| **US 15230 REFERENCE: SO 3 AC 3** |

1. An action plan to further improve performance and to build on positive performance is established with the employee.

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| **US 15230 REFERENCE: SO 3 AC 4** |

1. Agreed actions are documented and signed by both parties.

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| UNIT STANDARD: 15224 EMPOWER TEAM MEMBERS THROUGH RECOGNISING STRENGTHS, ENCOURAGING PARTICIPATION IN DECISION MAKING AND DELEGATING TASKS |

**The assessor to complete the following:**

Remember to cover all range items!!!!!!

Assessor to write observations or make clear references to evidence attached in the spaces provided.

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| **US REFERENCE: SO 1 AC 2** |

1. Team members are told what they do well, what needs improvement and what is expected in the future.

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| **US REFERENCE: SO 1 AC 2** |

1. All feedback is measured against performance expectations, which have been communicated to the team member.

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| **US REFERENCE: SO 1 AC 3** |

1. Feedback is given at the time that the event occurs.

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| **US REFERENCE: SO 1 AC 4** |

1. Feedback is honest, simple, specific and constructive.

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| **US REFERENCE: SO 1 AC 5** |

1. Team members are dealt with as valued and trusted members of the team.

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| **US REFERENCE: SO 2 AC 1** |

1. Team members are included in division/section/department decision-making by fully informing them of the situation and the decision(s) that needs to be taken.

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| **US REFERENCE: SO 2 AC 2** |

1. Team members are encouraged to think of solutions to the problem being as innovative as possible.

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| **US REFERENCE: SO 2 AC 3** |

1. Team members must be asked to provide alternatives, evaluate the alternatives and select one for implementation.

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| **US REFERENCE: SO 2 AC 4** |

1. The best solution is sought through getting team members to debate their viewpoints and work towards finding common ground.

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| **US REFERENCE: SO 3 AC 1** |

1. The work plan or task is analysed and broken down into smaller tasks, programmes or units of work and a decision taken as to who in the section is best suited to carry them out.

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| Dates: |
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| **US REFERENCE: SO 3 AC 2** |

1. The delegated tasks must be clearly communicated to employees indicating what is expected, how it must be done and where to get help, if necessary.

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| Dates: |
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| **US REFERENCE: SO 3 AC 3** |

1. Decision-making authority required to execute the task is indicated to the employee so that team members can react to situations immediately and effectively.

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| Dates: |
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| **US REFERENCE: SO 3 AC 4** |

1. A regular feedback and reporting schedule must be agreed upon.

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| Dates: |
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| **US REFERENCE: SO 3 AC 5** |

1. A system to enable the flow of information must be established by team members.

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| Dates: |
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| **US REFERENCE: SO 3 AC 6** |

1. The successful completion of delegated tasks must be monitored and the performance used a means of ongoing development.

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| Dates: |
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| **US REFERENCE: SO 3 AC 7** |

1. Successful achievement of delegated tasks must be given recognition.

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| Dates: |
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| **US REFERENCE: SO 3 AC 1** |

1. Decisions taken are reviewed in small-group and/or whole group situations to decide on their success in reaching the stated objectives.

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| Dates: |
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| **US REFERENCE: SO 3 AC 2** |

1. Correct decisions are confirmed and incorrect decisions are rescinded or amended so as to enable the objectives to be met.

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| Dates: |
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FOR ASSESSOR

File Checked:

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| Date | Assessor Signature |
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This is to verify that the learner has completed all the above and has achieved competence.

Assessor Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Assessor Reg. No:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assessor Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This is to verify that the assessor has observed me in the workplace.  
  
Learners Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learners Reg No:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Learners Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Personal Narrative**

Answer the following questions based on your experience during the completion of this module. Discuss what you did well and what you would like to do differently.

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|  | **What went well?** | | | **What would I do differently?** | |
| ***1*** | ***I was able to identify and solve problems effectively throughout the various activities completed in this module.*** | | | | |
|  |  | | |  | |
| ***2*** | ***I was able to understand how different workplace activities have an impact on each other.*** | | | | |
|  |  | | |  | |
| ***3*** | ***I was able to use new technology effectively in my daily tasks that I carried out.*** | | | | |
|  |  | | |  | |
| ***4*** | ***I was able to communicate effectively with my team members and supervisors.*** | | | | |
|  |  | | |  | |
| ***5*** | ***I was able to complete all my work in an organized and efficient manner.*** | | | | |
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| **8** | **Additional Comments** | | | | |
|  |  | | | | |
|  | **Learner Name:** |  | **Signature** | |  |
|  | **Assessor Name** |  | **Signature** | |  |
|  | **Date** |  | **Date** | |  |

1. **Witness Testimony**

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| **Workplace Testimonial Evidence** |

**Instructions:**

The following section must be completed by the learner’s supervisor / manager in the workplace based on the learner’s workplace performance relevant to the Unit Standard completed.

*Constructive comments and testimonial evidence may also be attached in a separate document and referenced in the section below.*

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| **Testimonial Comments and Evidence of Workplace Performance** | | | | |
| Unit Standard Title | | | | SAQA ID: |
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| Supervisor / Manager Testimonial | | | | |
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| Unit Standard Title | | | | SAQA ID: |
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| Supervisor / Manager Testimonial | | | | |
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| Unit Standard Title | | | | SAQA ID: |
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| Supervisor / Manager Testimonial | | | | |
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| **Supervisor Acknowledgement** | | | | |
| Date: |  | Supervisor Signature |  | |
| **Assessor Acknowledgement** | | | | |
| Date: |  | Assessor Signature |  | |
| Comments and Feedback | | | | |
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| **Learner Acknowledgement** | | | | |
| Date: |  | Learner Signature |  | |
| Comments and Feedback | | | | |
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| **Moderator Acknowledgement** | | | | |
| Date: |  | Moderator Signature |  | |

1. **Logbook**

*This log book has been included to record all time spent on the report and assignment as well as other activities related to developing, implementing and monitoring a quality policy for a new venture. These activities should add to a total of 28 hours.*

*Time spent completing an activity should be signed off by a supervisor, mentor or witness where possible.*

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| **Learner Name:** |  | | | | |
| **Course Name** |  | | | | |
| **Unit Standard Name** |  | | | | |
| ID Number |  |  |  |  |  |
| **Unit Standard Name** |  | | | | |
| ID Number |  |  |  |  |  |
| **Unit Standard Name** |  | | | | |
| ID Number |  |  |  |  |  |
| **Unit Standard Name** |  | | | | |
| ID Number |  |  |  |  |  |

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| **Activity** | **Start Date** | **End Date** | **Total No of Hours** | **Sign Off by Supervisor / Manager / Mentor / Witness** | | |
| **Name & Surname** | **Relationship to Learner** | **Signature** |
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| **FEEDBACK SECTION** |
| Comments from Learner: |

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| **JUDGEMENT REPORT** | |
| Meet the requirements:  Requires additional evidence:  Can continue to the next assessment: | Do not meet the requirements:  Requires another assessment:  Requires another assessment by another assessment: |
| Action required: By when: | |
| Assessor’s feedback remarks | |
|  | |

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| **Declaration by Learner** | | |
| I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ declare that I am satisfied that the feedback given to me by the Assessor was relevant, sufficient and done in a constructive manner. I accept the assessment judgment and have no further questions relating to this particular assessment instrument. | | |
|  |  |  |
| Learner Name & Signature Date | Assessor Name & Signature Date | Moderator Name & Signature Date |

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| **ASSESSMENT DECISION AND DECLARATION** |

**Indicate with a tick in the relevant sections:**

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| The learner has not submitted sufficient evidence and is therefore not yet competent |  |
| The learner is required to submit additional evidence against the following: |  |
| The learner is required to improve in the following: |  |
| The learner is required to be reassessed: |  |
| The learner is required to be assessed by another assessor: |  |
| The learner has submitted evidence that is valid, relevant, current, sufficient and authentic against all the listed specific outcomes an covered all range statements and critical cross field outcomes |  |
| The learner is competent against the listed unit standards |  |
| The learner can be issued with a unit certificate |  |
| The learner has completed a full qualification |  |

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|  |  |
| Assessors full name & signature | Date |

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| **Declaration by Learner** | | |
| I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ declare that I am satisfied that the assessment conducted by the Assessor was relevant, sufficient, and constructive. I accept the assessment decisions and have no further questions relating to this particular assessment process. | | |
|  |  |  |
| Learner name & sign Date | Assessor name & sign Date | Moderator name & sign Date |

|  |  |
| --- | --- |
| **Reassessment Decision** | |
| The learner has submitted evidence that is valid, relevant, current, sufficient and authentic against all the listed specific outcomes an covered all range statements and critical cross field outcomes |  |
| The learner is competent against the listed unit standards |  |
| The learner can be issued with a unit certificate |  |
| The learner has completed a full qualification |  |

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| Assessors full name & signature | Date |

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| **Declaration by Learner** | | |
| I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ declare that I am satisfied that the assessment conducted by the Assessor was relevant, sufficient, and constructive. I accept the assessment decisions and have no further questions relating to this particular assessment process. | | |
|  |  |  |
| Learner name & sign Date | Assessor name & sign Date | Moderator name & sign Date |

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| EVALUATION OF ASSESSMENT | | | | | | | | |
| Learner Name |  | | | Assessor name | | | |  |
| Unit Stds |  | | | Date | | | |  |
| **Review dimension** | | **Learner**  **Yes No** | | | **Assessor**  **Yes No** | | **Action** | |
| Were the principles / criteria for good assessment achieved? | |  |  | |  |  |  | |
| Did the assessment relate to the registered standard? | |  |  | |  |  |  | |
| Was the assessment practical? | |  |  | |  |  |  | |
| Was it time efficient and cost-effective? | |  |  | |  |  |  | |
| The assessment did not interfere with my normal responsibilities? | |  |  | |  |  |  | |
| Was the assessment instrument fair, clear, and understandable? | |  |  | |  |  |  | |
| The assessment judgment was made against set requirements? | |  |  | |  |  |  | |
| Was the venue and equipment functional? | |  |  | |  |  |  | |
| Were special needs identified and the assessment plan adjusted? | |  |  | |  |  |  | |
| Was feedback and communication constructive? | |  |  | |  |  |  | |
| Was an opportunity to appeal given? | |  |  | |  |  |  | |
| Was all evidence recorded? | |  |  | |  |  |  | |
| Were the review / evaluation process apparent and user friendly? | |  |  | |  |  |  | |

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| **Learner Declaration of Understanding** | | |
| I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid | | |
|  |  |  |
| Learner Name & Sign Date | Assessor Name & Sign Date | Moderator Name & Sign Date |