

# **SAQA ID 59201**

## **NATIONAL CERTIFICATE: GENERIC MANAGEMENT CLUSTER 4**

**Accredited  
course  
information:**

**Unit Standard ID**

**NQF Level**

**Credits**

**121140**

**5**

**9**

Recruit and select candidates to fill defined positions

**Accredited  
course  
information:**

**Unit Standard ID**

**NQF Level**

**Credits**

**252029**

**5**

**8**

Lead people development and talent management

**Accredited  
course  
information:**

**Unit Standard ID**

**NQF Level**

**Credits**

**252035**

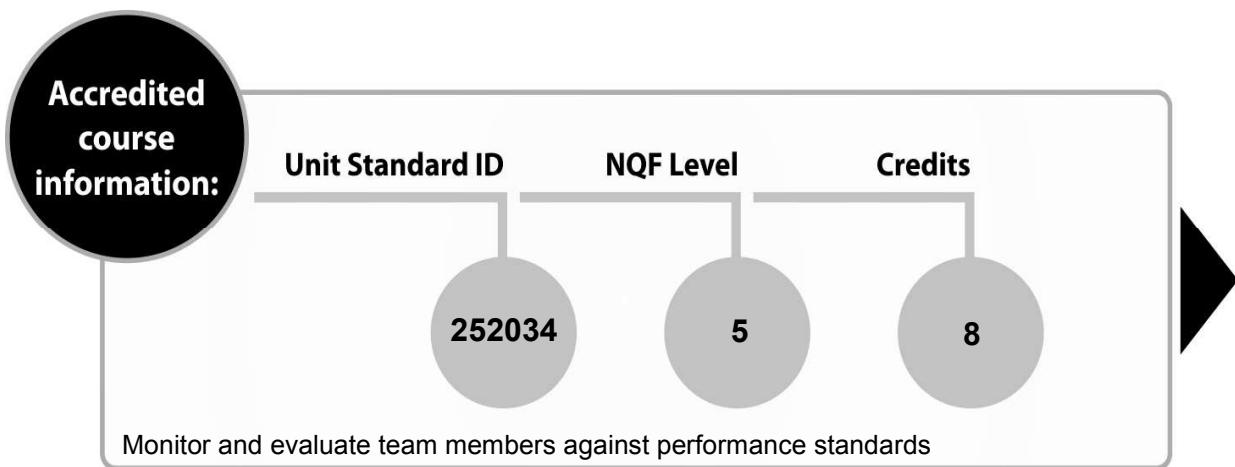
**5**

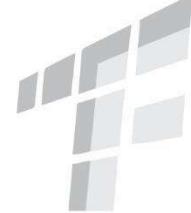
**8**

Select and coach first line managers

**T.N.**

**Investing in your talent!**





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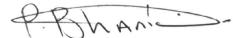
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## PRE-ASSESSMENT MEETING CHECKLIST

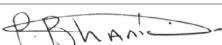
The **Qualification Induction Video** would've clearly explained all the items below. If you are not sure, revert to the video and ensure understanding before completing this checklist.

#	POINTS TO BE DISCUSSED	
Did the facilitator/Assessor:		
1.	Provide a clear explanation of Outcomes-based assessment and the NQF system.	x
2.	Explain the assessment process and the principles of good assessment practice.	x
3.	Explain the roles and responsibilities of the learner, assessor and moderator.	x
4.	Explain the learner's rights, discuss the appeals process and assessment policies	x
5.	Ensure the learner was ready for the assessment by conducting formative assessment	x
6.	Provide the Learner with a copy of the unit standard against which they will be assessed	x
7.	Discuss and identify any special needs of the learner	x
8.	Discuss the VACS evidence requirements	x
9.	Discuss the assessment planning and conducting document s indicating the evidence, methods, resources, timing and special needs	x
10.	Discuss the importance of confidentiality if all the information.	x
11.	Give the Learner an opportunity to seek clarification on any items discussed	x
Learner Signature		
Assessor Signature		
Date of Meeting	20/09/23	

# ASSESSMENT PLAN

This document is for **assessment purposes** only. You are only required to complete your name and sign once the Assessor has assessed your Portfolio and provided you with feedback.

**Assessor:** No formatives have been aligned to the Assessment plan as they address areas of knowledge that should be embedded for the learner to complete the practical outcomes required. Knowledge has thus only been tested during the formative assessment completion.

Date of Assessment	06/03/24							
Assessor Declaration <b>C</b>	The assessor at this moment declares that this document will be completed and a judgment made once all the evidence submitted according to this plan has been assessed against model answers and the VACS criteria							
Assessor Name	Nokuthula Shange			Assessor signature				
Moderator Name				Moderator Signature				
Learner Name	Philasande Bhani			Learner Signature				
Mentor/ Facilitator Name	Nokuthula Shange			Mentor/ Facilitator Signature				
Key to Methods	Obs	Observation	Q	Questioning	PE	Product Evaluation	LB	Logbook

## ID 12140 - Recruit and select candidates to fill defined positions

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
<b>SO1: Plan and prepare for recruitment and selection.</b>								
1.1	Information is obtained on the position that is relevant and complete.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.2	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.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.3	The selection procedure is confirmed to be a validated procedure.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.4	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.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.5	Selection criteria and control procedures are developed in line with organisational and legal requirements and avoid partiality or bias.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.6	A plan is developed that ensures effective and efficient recruitment and selection	Summative 1	Practical Demonstration	Product Evaluation	✓			
<b>SO2: Recruit applicants.</b>								
2.1	Recruitment is conducted in accordance with the plan and in	Summative 1	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2nd</b>	<b>3rd</b>
	such a way as to have the potential to elicit the desired response from the target market.			Observation	✓			
2.2	Responses are dealt with in accordance to planned control procedures.	Summative 1	Practical Demonstration	Product Evaluation	✓			
2.3	The initial screening determines if applicants meet the critical job specifications and requirements to expedite the departure of unsuitable applicants.	Summative 1	Practical Demonstration	Product Evaluation	✓			
2.4	Implementation of corrective action following the evaluation of the initial recruitment plan, if the initial screening does not elicit desired responses.	Summative 1	Practical Demonstration	Product Evaluation	✓			
2.5	A list of potential candidates is prepared to facilitate the selection.	Summative 1	Practical Demonstration	Product Evaluation	✓			
2.6	An applicant database is managed in accordance with legislation and organisational requirements.	Summative 1	Practical Demonstration	Product Evaluation	✓			
2.7	Unplanned events are dealt with in accordance with the circumstances, and contingency plans are initiated.	Summative 1	Practical Demonstration	Product Evaluation Observation	✓			

### **SO3: Select staff.**

3.1	Backgrounds and qualifications are validated using appropriate verification methods according to the plan.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.2	Candidates are assessed against the requirements of the defined position.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.3	Candidates are interviewed using best practice techniques appropriate to the defined position.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.4	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.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.5	Selections are made in accordance with planned strategy and can be justified in terms of the best match between candidate profile and job and organisation requirements and meeting legislative requirements.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.6	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.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.7	Records are documented to facilitate further processing and	Summative 1	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2nd</b>	<b>3rd</b>
	reflect agreements reached and successful candidate details accurately. Records are authorised and forwarded to designated personnel.							
3.8	Unplanned events are dealt with in accordance with the circumstances, and contingency plans are initiated.	Summative 1	Practical Demonstration	Product Evaluation	✓			

#### ID 252029 - Lead people development and talent management

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
<b>SO1: Analyse education, training and development needs of members of a unit.</b>								
1.1	The skills gaps and training needs of staff in the work unit are determined through the training needs analysis.	Summative 2	Practical Demonstration	Product Evaluation	✓			
1.2	The results from the recent performance appraisal are integrated into the training needs analysis.	Summative 2	Practical Demonstration	Product Evaluation	✓			
1.3	The entity's talent management strategy was used as a basis for conducting the training needs analysis of staff in the unit.	Summative 2	Practical Demonstration	Product Evaluation	✓			
1.4	Stakeholder input was obtained to reach agreement on the interpretation of the results of the training needs analysis.	Summative 2	Practical Demonstration	Product Evaluation	✓			
<b>SO2: Record the results of the training needs analysis.</b>								
2.1	The development needs of staff to be addressed through training and non-training interventions are recorded in the training needs analysis report.	Summative 2	Practical Demonstration	Product Evaluation	✓			
2.2	The development needs are related to the career development paths of individual staff members in accordance with the requirements of the entity.	Summative 2	Practical Demonstration	Product Evaluation	✓			
2.3	The development needs are linked to the talent management strategy of the entity.	Summative 2	Practical Demonstration	Product Evaluation	✓			
2.4	The report on the training needs analysis is communicated to interested parties in a usable format.	Summative 2	Practical Demonstration	Product Evaluation	✓			
<b>SO3: Compile a people development plan for a unit.</b>								
3.1	The types of the learning programmes described in the plan are motivated in terms of the development needs identified through the training needs analysis conducted.	Summative 2	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
3.2	The objectives and desired outcomes of the planned learning programmes are appropriately linked to the needs identified in the training needs analysis.	Summative 2	Practical Demonstration	Product Evaluation	✓			
3.3	The responsibilities for the implementation of the plan and time frames are stipulated to enhance effective implementation.	Summative 2	Practical Demonstration	Product Evaluation	✓			
3.4	The role of the unit manager in relation to talent management and people development within a unit are motivated through practical examples.	Summative 2	Practical Demonstration	Product Evaluation	✓			
3.5	The plan is aligned with the legal framework and internal requirements relating to skills development.	Summative 2	Practical Demonstration	Product Evaluation	✓			
3.6	The commitment to promoting lifelong learning within a learning culture is reflected in the development plan.	Summative 2	Practical Demonstration	Product Evaluation	✓			

**SO4: Manage the implementation of the people development plan of a unit.**

4.1	The implementation is monitored to track progress against the people development plan and the quality requirements of the national skills development system.	Summative 2	Practical Demonstration	Product Evaluation	✓			
4.2	Implementation reports submitted are analysed to evaluate whether the planned objectives and outcomes were achieved.	Summative 2	Practical Demonstration	Product Evaluation	✓			
4.3	The evaluation of learners and other interested parties is integrated into a final evaluation report with recommendations on improvements.	Summative 2	Practical Demonstration	Product Evaluation	✓			

**ID 252035 - Select and coach first-line managers**

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
<b>SO1: Select first-line manager for a specific position</b>								
1.1	An analysis is conducted of the job profile to determine the key performance areas for the first-line management position.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.2	Selection and weighting criteria for the Key Results Areas of the first-line management position are described on the basis of the job profile.	Summative 2	Practical Demonstration	Product Evaluation	✓			
1.3	Liaison with the recruitment function of the entity is undertaken to ensure	Summative 1	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
	understanding of the requirements of the position.							
1.4	Interviewing, desk checking and/or other techniques are used to arrive at a shortlist of the candidates who applied for the position.	Summative 1	Practical Demonstration	Product Evaluation	✓			
1.2	Decisions are taken and offer made to the selected manager in accordance with organisational policies and procedures.	Summative 1	Practical Demonstration	Product Evaluation	✓			
<b>SO2: Plan the coaching process of a first-line manager.</b>								
2.1	A coaching plan and schedule is drawn up according to identified priorities in a unit	Summative 2	Practical Demonstration	Product Evaluation	✓			
2.2	Records of expected performance against the manager's Key Results Areas are prepared to serve as a basis for discussions with the selected manager.	Summative 2	Practical Demonstration	Product Evaluation	✓			
2.3	A system is implemented for recording the decisions, commitments made and other relevant information from the discussions.	Summative 2	Practical Demonstration	Product Evaluation	✓			
<b>SO3: Coach selected the first-line manager.</b>								
3.1	The purpose, content and schedule of the coaching process is explained to the selected manager in order to reach agreement on the coaching process.	Summative 1	Knowledge	Question	✓			
3.2	During the coaching sessions, the selected manager's performance is discussed against the Key Result Areas and recorded for future reference.	Summative 2	Practical Demonstration	Product Evaluation	✓			
3.3	Identified gaps and actions to close them are agreed upon and recorded in the coaching action plan.	Summative 1	Practical Demonstration	Product Evaluation	✓			
3.4	Feedback given to the manager is honest, constructive and supportive.	Summative 3	Practical Demonstration	Product Evaluation	✓			
<b>SO4: Monitor and measure the results of coaching sessions.</b>								
4.1	Actions agreed to at a coaching session are monitored at times agreed to during the coaching session.	Summative 3	Practical Demonstration	Product Evaluation	✓			
4.2	Positive feedback is given to the selected manager for accomplishments against the coaching action plan.	Summative 3	Practical Demonstration	Product Evaluation Observation	✓			
4.3	Corrective actions agreed upon are recorded in areas where	Summative 3	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
	requirements in the coaching action plan have not been met.							
4.4	Follow up action taken on the basis of the manager's response to the coaching is in line with organisational policies and procedures.	Summative 3	Practical Demonstration	Product Evaluation	✓			
4.5	Line managers are encouraged to use the coaching process with people reporting to them after explaining and agreeing on a system with them.	Summative 3	Practical Demonstration	Product Evaluation	✓			

#### ID 252034 - Monitor and evaluate team members against performance standards

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
<b>SO1: Formulate performance standards for team members in a unit.</b>								
1.1	Performance standards to be achieved by team members are formulated in relation to the unit's goals, objectives and deliverables.	Summative 4	Practical Demonstration	Product Evaluation	✓			
1.2	Performance standards are clear and concise and specify the activities to be performed and the standards to which they are to be performed.	Summative 4	Practical Demonstration	Product Evaluation	✓			
1.3	Feedback from team members is incorporated into the standards to promote the buy-in of team members in a unit.	Summative 4	Practical Demonstration	Product Evaluation	✓			
1.4	Performance standards are recorded and documented according to the entity's policies and procedures.	Summative 4	Practical Demonstration	Product Evaluation	✓			
<b>SO2: Establish systems for monitoring performance.</b>								
2.1	A variety of performance monitoring systems are identified and reviewed for possible use in a unit.	Summative 4	Practical Demonstration	Product Evaluation	✓			
2.2	The performance monitoring system selected is in line with the entity's policies and procedures for performance assessment.	Summative 4	Practical Demonstration	Product Evaluation	✓			
2.3	The performance monitoring system is communicated to team members to promote buy-in.	Summative 4	Practical Demonstration	Product Evaluation	✓			
2.4	The system for monitoring performance against standards is set up in accordance with the entity's policy and procedures.	Summative 4	Practical Demonstration	Product Evaluation	✓			
<b>SO3: Prepare for a performance review of a team member.</b>								
3.1	The arrangements for the performance review are agreed with a team member, including	Summative 4	Practical Demonstration	Product Evaluation	✓			

	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
	the time, place and nature of the review.							
3.2	Preliminary assessment of performance against the agreed standards is conducted using monitoring systems.	Summative 4	Practical Demonstration	Product Evaluation	✓			
3.3	Information gathered during the preliminary assessment is documented to be available for future reference.	Summative 4	Practical Demonstration	Product Evaluation	✓			
3.4	Methods for giving constructive feedback are identified that make provision for reporting positive and negative findings.	Summative 4	Practical Demonstration	Product Evaluation	✓			
3.2	Documents to be used during the review are prepared in accordance with the entity's policies and procedures.	Summative 4	Practical Demonstration	Product Evaluation	✓			

**SO4: Monitor and measure the results of coaching sessions.**

4.1	The review is conducted in accordance with the arrangements previously agreed with the team member.	Summative 4	Practical Demonstration	Product Evaluation	✓			
4.2	Feedback provided to the team member is relevant and fair and communicated in a constructive and supportive manner.	Summative 4	Practical Demonstration	Product Evaluation	✓			
4.3	Findings on positive and negative aspects of the member's performance are recorded accurately, fairly and honestly for the report back and follow-up.	Summative 4	Practical Demonstration	Product Evaluation	✓			
4.4	An action plan to address performance gaps and build on positive performance is agreed upon with the employee.	Summative 4	Practical Demonstration	Product Evaluation	✓			
4.2	Agreed actions are documented and signed by both parties. Agreed actions are documented and signed by both parties.	Summative 4	Practical Demonstration	Product Evaluation	✓			

# FORMATIVE ASSESSMENT ACTIVITIES



**Learner Instruction:** Please complete the following checklist to indicate that you have completed all the formative assessment activities required for your portfolio. These activities must have been completed on the DigiAssist System and evidence of each outcome pdf printed signed and placed behind this page.

#	<b>FORMATIVE ASSESSMENT ACTIVITY</b>	<b>TICK TO CONFIRM COMPLETION</b>
1	Formative Assessment Activity 1	X
2	Formative Assessment Activity 2	X
3	Formative Assessment Activity 3	X
4	Formative Assessment Activity 4	X

Learner signature: 

Assessor signature: 

Moderator signature:



**Learner Instruction:** Please complete the following checklist to ensure that you have completed all the summative assessment activities. These activities should be completed in full and as per instructional video provided after the Cluster, ensure to have full understanding of what is required before attempting these activities.

## SUMMATIVE ASSESSMENT ACTIVITIES

#	<b>SUMMATIVE ACTIVITY</b>	<b>TICK TO CONFIRM COMPLETION</b>
1.	Summative Assessment Activity 1	X
2.	Summative Assessment Activity 2	X
3.	Summative Assessment Activity 3	X
4.	Summative Assessment Activity 4	X
Learner Signature:		
Assessor Signature:		
Moderator Signature:		

## **SUMMATIVE ASSESSMENT ACTIVITY 1: PRACTICAL ASSIGNMENT**



US 12140 SO 1 – 3
US 252035 SO 1
US 12140 EEK 1 -2
US 12140 CCFO ALL; US 252035 ALL
Assessment Method: Product Evaluation

**INSTRUCTIONS:** Use the method as explained in your POE Instructional Video from Cluster 1 to complete the questions.

**Scenario:** There is a position available in your organisation for a First Line Manager. This is an internal position and potential candidates should be selected from the within the organisation.

**Do the following:**

1. Obtain information about the position from the relevant Department.
2. Analyse the Job to create an effective Job Descriptions with specifications (a Job Analysis template has been provided for ease of completion)
3. Send an email to Human Resources with the created analysis attached for validation of the created Job Description.
4. Start the recruitment process, by using the Recruitment Plan template provided to plan the recruitment of the First Line Manager.
5. Use the Action Plan template provided to create an effective action plan for the recruitment and selection of the First Line Manager.
6. Execute the action plan to recruitment/select and employ a suitable candidate for the position. (This may be a simulated process using workplace colleagues as the target audience – send the media advert to as many colleagues as possible asking them to apply for the position – you need to receive at least 10 applications and shortlist at least 3). This process includes setting up the interviews (use the Interview form template to prepare and conduct the interviews with the selected candidates).
7. Capture the necessary information of all applicants in a database – this may be in the form of spreadsheet.
8. A brief synopsis of the legislation used to govern this recruitment and selection process.

**You need to provide the following as evidence:**

1. The created Job Analysis for the said position.
2. The email sent and feedback received for validation of the Job Description.
3. The Recruitment Plan created for the said position.

4. The Action Plan created for the recruitment and selection process.
5. The spreadsheet used to capture the applicants received.
6. A list of the shortlisted candidates.
7. Interview forms with notes and interview criteria for each of the 3 applicants interviewed.
8. An email of the feedback sent to unsuccessful and successful applicants (when arranging interviews).
9. Communication in the form an email where an applicant wasn't able to make the suggested date and time of the interview. The email must show how you dealt with situation and what alternative arrangements were made.
10. The spreadsheet/database that captured the applicants, that indicates which candidates were shortlisted and interviewed.
11. An email as communication with necessary documentation sent to HR for authorisation.
12. An email confirmation of the candidate accepting the position and relevant information to confirm employment.
13. The brief synopsis of the legislation used to govern the recruitment and selection process.

All evidence must be signed and dated in accordance with specifications dealt with in the POE Video and Learner Induction.

**IMPORTANT:**

**In the case where personal information is required, this must be changed to protect the personal information of the individual and comply with the Protection of Information Act. No real names, address, ID numbers, company names, data may be used. This must all be simulated.**

Feedback to Learner:

Well done

VACS Assessment of Evidence	✓	A	C	S
Result of First Assessment	✓	NYC	Date	06/03/24
Result of Second assessment	C	NYC	Date	
Result of Third Assessment	C	NYC	Date	
Learner Signature			Date	20 Feb 2024
Assessor Signature			Date	06/03/24
Moderator Signature			Date	

## **SUMMATIVE ASSESSMENT ACTIVITY 2: PRACTICAL ASSIGNMENT**



US 252029 SO 1 - 4

EEK All

CCFO All

Assessment Method: Product Evaluation

**INSTRUCTIONS:** Use the method as explained in your POE Instructional Video from Cluster 1 to complete the questions.

You need to analyse positions and employee skills to determine Training Needs in the Department of which one position must be for a First Line Manager.

### **Do the following:**

1. Conduct a training needs analysis – a template in an excel format has been provided for your convenience, the template shows the competencies that need to be weighted for the position in one sheet and of the employee in the other. Use the rate weights to set the performance levels required and then rate weight each employee in accordance with their current performance. Once complete the template provides a full summary of expected results and variances.
  
2. Write a training needs analysis report to discuss the results found during the training needs analysis performed, include the developmental needs of employees that need to be addressed through training and non-training interventions.
  
3. Send the report to Your Manager and gain input on the results received.
  
4. Create a PDP for one of the Employee's analysed, ensuring that the needs identified are linked to learning planned in the PDP. A Performance/Personal Development Plan template has been provided for your convenience.
  
5. Develop an action plan that plots out planned completion dates set in the PDP with actual dates to monitor the implementation of the PDP. Monitor and Track Progress of the action plan – this may be a simulated exercise.

6. Write a synopsis that explains how the following influences a Training Needs Analysis:
- The principles and roles of the Human Resources Development in building a competent workforce.
  - Legal Frameworks that govern skills development and employment equity relevant to people development processes, refer to the NQF, SDA, EEA and BBBEE Scoring as well as the different type of delivery modes and methods of Learning (skills programs, learnerships, non-credit bearing)
  - Discuss how your organisation goes about ensuring that it adopts a learning culture and is a learning organisation to promote lifelong learning.

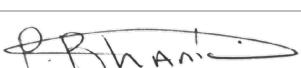
**Provide the following as evidence:**

- A completed Training Needs Analysis of a Team and of at least 5 employees' in the team.
- A comprehensive Training Needs Analysis report in correct written report format.
- An email confirmation of a discussion between yourself and your Manager about the training needs analysis report.
- Completed PDP for at least 1 of the Employee's
- An action plan that tracks the progress of the implementation of the PDP.
- A comprehensive synopsis in a suitable format of all the areas mentioned in a – c.

Remember to sign and date all this evidence as instructed.

Feedback to Learner:

**Well done**

VACS Assessment of Evidence	✓	✗	C	S
Result of First Assessment	✓	NYC	Date 06/03/24	
Result of Second assessment	C	NYC	Date	
Result of Third Assessment	C	NYC	Date	
Learner Signature 			Date	2024-02-20
Assessor Signature 			Date	20 Feb 2024 06/03/24
Moderator Signature			Date	

## **SUMMATIVE ASSESSMENT ACTIVITY 3: PRACTICAL ASSIGNMENT**

	US 252035 SO 1 - 4
	EEK All
	CCFO All
	Assessment Method: Product Evaluation

You are the Manager and need to coach one of your employee's to enhance their task performances.

### **Do the following:**

1. Using the Job Profile/description produced in Summative Activity 1, the employee selected in the recruitment process and the Position weights of the Skill/Competencies for the First Line Manager you determined in Summative Activity 2.
  - a. Draft a coach plan and schedule to address the priority areas to develop for the First Line Manager. A coaching template pack to plan, schedule and coach a coachee have been uploaded for your convenience. This will require completing all the templates provided in the template pack.
  - b. Once you have drafted the plan, set up a one-on-one meeting with the coachee and explain the coaching process and the complete the documentation from the template pack. Ensuring that the coachee completes their section of the plan.
  - c. Implement the coaching process with the First Line Manager, ensuring to have meetings as planned, keeping the coaching pack documentation up to date, with comments and feedback as indicated.

### **Provide the following as evidence:**

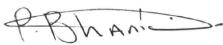
1. Completed Coach and Coachee Evaluation
2. Completed Coachee Assistance Log
3. Completed Coachee Workplace Log
4. A brief synopsis of how you approached the process and any challenges and or conflicts that occurred were dealt with.

Remember that personal information may be changed to protect the identity of the individual.

The Coaching Procedure has been provided for your convenience as an example.

Feedback to Learner:

Well done

VACS Assessment of Evidence	✓	A✓	✓	✓
Result of First Assessment	✓	NYC	Date	06/03/24
Result of Second assessment	C	NYC	Date	
Result of Third Assessment	C	NYC	Date	
Learner Signature			Date	20 Feb 2024
Assessor Signature			Date	06/03/24
Moderator Signature			Date	

## **SUMMATIVE ASSESSMENT ACTIVITY 4: PRACTICAL ASSIGNMENT**

	US 252034 SO 1 - 4
	EEK All
	CCFO All
	Assessment Method: Product Evaluation

**IMPORTANT:** This may be a simulated exercise performed with at least 5 colleagues or fellow learners, assuming the role of a team member. Use your selected colleagues/fellow learners as a group through-out.

You are in a Management position and need to evaluate the performance of your team. In Summative Assessment 2, you conducted a Training Needs Analysis, however the Position Analysis would provide key indicators for the Key Performance Areas of the positions. Using this information as your performance standard that is required to be achieved by the Team then:

### **Do the following:**

1. Adjust the Training Needs Analysis to form a Performance Standard for each of the positions to align your unit's goals, objectives, and deliverables to the standard. Include the specific activities of the Unit that needs to be performed.
2. Arrange a meeting with the Team to discuss the Performance Standards you have produced for the team. Encourage feedback from the team and obtain a buy-in.
3. Create a system to monitor the team's performance against the set standards for at least one month.
4. Email the process that will be used to monitor performance to all team members.
5. Arrange a meeting with the team to discuss the monitored performance; include discussions of the following:
  - a. Positive and negative aspects of the performance.
  - b. Agree Actions to correct under performance.
6. Provide each member with the Performance Review Template to complete.

### **Provide the following as evidence:**

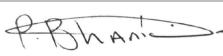
1. The Performance Standard that outlines the goals, objectives, and deliverables for the month.
2. Minutes of the meeting had with the team to discuss the expected performance.
3. Monitor results of performance standards against actual performed.

4. Email as confirmation that you communicated the monitoring system to the team.
5. Minutes of the meeting showing discussions held during the performance review meeting – ensuring to include agreed actions, findings of both positive and negative aspects of the performance.
6. Complete Review Evaluation Checklist completed by each member.
7. A synopsis discussing the following:
  - a. Methods of formulating key result areas and performance standards.
  - b. Types of monitoring performance.
  - c. The process used to conduct the performance review.
  - d. Methods of giving constructive feedback.

Remember that personal information may be changed to protect the identity of the individual.

Feedback to Learner:

**Well done**

VACS Assessment of Evidence	✓	✗	✓	✗
Result of First Assessment	✓	NYC	Date	06/03/24
Result of Second assessment	C	NYC	Date	
Result of Third Assessment	C	NYC	Date	
Learner Signature			Date	20 Feb 2024
Assessor Signature			Date	06/03/24
Moderator Signature			Date	

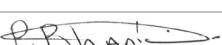
Type text here

# LEARNER EVALUATION OF THE ASSESSMENT PROCESS

Kindly complete the form below to provide feedback to the assessor

Please answer the following questions by ticking the applicable box		
Criteria	Yes	No
Did the assessor go through the assessment meeting with you?	x	
Did the assessor explain the reason for the assessment	x	
Did you receive a copy of the Unit standard/s you were being assessed against	x	
Did the assessor explain the assessment methods and criteria?	x	
Where the instructions for each assessment clear?	x	
Did your assessor provide you with developmental feedback?	x	
Do you agree with the feedback?	x	

Additional Comments: None

Learner Name	Philasande Bhani
Signature:	
Date:	13/02/2024

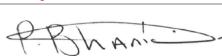
# DEVELOPMENT PLAN

## To be completed by the Assessor.

Assessor it is important to provide the learner with direction, development, and growth. Observation during the process will assist in completing this for the learner. Take note of time management, self-esteem, confidence, organisation, self-management and discipline.

Learner Name	Philasande Bhani
Assessor Name	Nokuthula Shange
Programme Name:	Generic Management L5
Date:	06/03/24
Areas of development and additional evidence required	

All outcomes met

Resubmission date	N/A
Learner Signature	
Assessor Signature	

## SUMMATIVE ASSESSMENT ACTIVITY 1: PRACTICAL ASSIGNMENT

### 1. Job Analysis for First Line Manager Position:



### 2. Email to Human Resources:

Validation Needed: First-Line Manager Job Description

PB Philasande Bhani  
To Mosima Leshika  
Cc Caron Elferink

Job Description.docx 26 KB

Dear HR Manager,

I hope you're doing well. Could you please review and validate the attached job description for the First-Line Manager position? Your input is crucial before we proceed further.

Thank you for your prompt attention to this matter.

Best regards,



### HR Managers Feedback:

RE: Revised Job Description for Validation



Mosima Leshika  
To Philasande Bhani  
Cc Caron Elferink

Good Morning Philasande,

The job description looks good. You can proceed with submission.

Kind Regards,



**Mosima Leshika**  
HR Manager  
African Resonance Business Solutions (Pty) Ltd  
+27 (11) 750 1600  
[mosimal@africanresonance.com](mailto:mosimal@africanresonance.com)  
[www.africanresonance.com](http://www.africanresonance.com)

T.N.

**3. Recruitment Plan for First Line Manager Position:**



**4. Action Plan for Recruitment and Selection Process:**



**5. Spreadsheet for Applicant Tracking:**



**6. Shortlisted Candidates:**

1. Themba Zwane
2. Michael Davis
3. Robert Johnson

**7. Interview Forms:**

Interview form for Themba Zwane.



Interview form for Michael Davis.



Interview form for Robert Johanson.



T.N.

**8. Email to Applicants:**

**Successful Applicant.**

Invitation to Interview - First Line Manager Position

PB

Philasande Bhani  
To: thembatwane@gmail.com

Dear Themba Zwane,

I hope this email finds you well.

We are pleased to inform you that your application for the First Line Manager position at Cappayments, Internal Systems has been successful. Congratulations!

We would like to invite you for an interview to further discuss your qualifications, experience, and how you can contribute to our team. The interview will take place on 16 January 2024 and ~~10:00 am~~ ✓ at our office located at 28 Galaxy Ave, Frankenword, Sandton, 2090.

Please confirm your availability for the interview by replying to this email. Additionally, if you have any specific scheduling requirements or questions, feel free to let us know, and we will do our best to accommodate them.

We look forward to meeting with you and discussing this exciting opportunity in more detail.

Best regards,

Philasande Bhani  
Software Developer  
Cappayments, Internal Systems

**Unsuccessful Applicant.**

Update on Your Application - First Line Manager Position

PB

Philasande Bhani  
To: 'emilyjonson@gmail.com'

Dear Emily Jonson,

Thank you for your interest in the First Line Manager position at Cappayments, Internal Systems.

We regret to inform you that, after careful consideration, we have decided not to move forward with your application at this time. We appreciate the time and effort you invested in the application process and wish you the best in your job search.

Thank you for considering a career with us.

Sincerely,

Philasande Bhani  
Software Developer  
Cappayments, Internal Systems

T.N.

## 9. Communication with Applicant:

Re: Interview Confirmation - First Line Manager Position



Themba Zwane <thembatwane@gmail.com>  
To: Philasande Bhani

Reply Reply All Forward ...

Dear Philasande Bhani,

I hope this email finds you well.

I am writing to express my sincere apologies for any inconvenience caused, but unfortunately, I am unable to make the suggested date and time for the interview scheduled on 17 January 2024 10:00am.

Due to unforeseen circumstances, I have a prior commitment that cannot be rescheduled. However, I am very interested in the opportunity to interview for the First Line Manager position at Cappayments, Internal Systems, and I am keen to find an alternative arrangement that works for both parties.

Would it be possible to discuss alternative dates and times for the interview? I am available [Provide your availability], and I am flexible to accommodate your schedule.

Once again, I apologize for any inconvenience caused and appreciate your understanding and cooperation in this matter.

Looking forward to your response and the opportunity to interview for the position.

Best regards,

Themba Zwane

RE: Interview Confirmation - First Line Manager Position



Philasande Bhani  
To: Themba Zwane

---

Dear Themba,

Thank you for your email and for suggesting an alternative date and time for the interview.

I am pleased to inform you that we have accepted your proposed schedule change. The interview for the First Line Manager position at Cappayments, Internal Systems will now be scheduled for the date and time you suggested: 17 January 2024 at 10:00 am.

We appreciate your flexibility and understanding in this matter.

Looking forward to meeting with you on 17th January.

Best regards,

Philasande Bhani  
Software Developer

## 10. Spreadsheet/Database of Applicants:



Database of  
Applicants for First Lir

T.N.

## 11. Email to HR for Authorization:

Authorization for Hiring First Line Manager



Philasande Bhani  
To: Mosima Leshika  
Cc: Caron Elferink

Reply Reply All Forward ...

Interview Form Template.pdf 2 MB Themba's Cover Letter.pdf 62 KB Themba's CV.pdf 74 KB

Dear HR manager,

I am pleased to inform you that we have identified a suitable candidate for the First Line Manager position within the Cappayments department. I have attached the necessary documentation for your review and authorization.

Looking forward to your approval.

Best regards,



## 12. Email Confirmation from Candidate:

Confirmation of Employment Offer



Themba Zwane <thembatwane@gmail.com>  
To: Philasande Bhani

Reply Reply All Forward ...

Dear Philasande Bhani,

Thank you for extending the offer of employment for the First Line Manager position at AR. I appreciate the opportunity and am excited to join the team.

I have received the formal offer letter and relevant details attached to your email. I will review them thoroughly and confirm my acceptance as soon as possible.

Looking forward to contributing to the success of AR.

Best regards,

Themba Zwane

## 13. Brief Synopsis of Legislation:

The recruitment and selection process in any organization is bound by a plethora of legislations aimed at fostering equality and fairness in the workplace. One such crucial legislation is the Equal Employment Opportunity Act, which serves as a cornerstone in combating discrimination based on various factors including race, gender, religion, and disability status. This act mandates employers to offer equal opportunities to all candidates, ensuring that hiring decisions are made solely based on qualifications and merit, rather than irrelevant personal characteristics. By adhering to the guidelines outlined in this act, companies can cultivate a diverse and inclusive workforce that reflects the broader societal fabric.

Moreover, the Fair Labour Standards Act (FLSA) plays a pivotal role in safeguarding the rights of employees and setting standards for workplace practices. Enacted to protect workers' rights, the FLSA establishes minimum wage requirements, governs overtime pay, and prohibits the exploitation of child labour. Compliance with these provisions is crucial for employers to maintain ethical labour practices and ensure that employees are compensated fairly for their work. By abiding by the regulations stipulated in the FLSA, organizations not only uphold their legal obligations but also demonstrate their commitment to upholding the well-being and rights of their workforce.

T.N.

## SUMMATIVE ASSESSMENT ACTIVITY 2: PRACTICAL ASSIGNMENT

### 1. Training Needs Analysis:



Training Needs  
Analysis Template (v2)

### 2. Training Needs Analysis Report:



Training Needs  
Analysis Report.pdf

### 3. Email Confirmation with Manager:

#### Discussion on Training Needs Analysis Report



[Reply](#) [Reply All](#) [Forward](#) [...](#)

Dear Caron Elferink,

I trust this email finds you in good health and high spirits.

I am writing to inform you that I have completed the Training Needs Analysis (TNA) report for our team, which focuses on identifying areas for skill development and proposes training interventions.

I believe that reviewing the findings and recommendations together will be beneficial in aligning our team's capabilities with the organization's strategic objectives.

I would like to schedule a discussion with you at your earliest convenience to go over the details of the report. This discussion will provide us with the opportunity to explore potential training opportunities and initiatives that can further enhance our team's performance and effectiveness.

Please let me know a time that works best for you, and I will ensure to accommodate it in my schedule accordingly.

Thank you for your attention to this matter, and I look forward to our productive discussion.



### 4. Completed PDP for Employee:



Performance  
Development Plan For

### 5. Action Plan:



(PDP) Implementation  
Action Plan.pdf

T.N.

## 6. Synopsis:

The Performance Development Plan (PDP) serves as a structured approach within the organization's Human Resources Development strategy. HR plays a pivotal role in identifying training needs and opportunities for professional growth, aligning them with the organization's goals. By investing in employee development initiatives, HR ensures a skilled and competent workforce, thus contributing significantly to organizational success.

Compliance with legal frameworks, including the National Qualifications Framework (NQF), Skills Development Act (SDA), and Employment Equity Act (EEA), is paramount. These frameworks guide the planning and execution of training programs, ensuring adherence to regulatory requirements, and promoting equal opportunities for skills development. Thus, legal compliance not only safeguards the organization but also fosters a fair and transparent training process.

Creating a learning culture is essential for driving the success of the PDP. By fostering an environment where continuous learning and development are encouraged, organizations empower employees to grow and excel. Providing access to training opportunities and facilitating knowledge sharing enables employees to adapt to evolving business needs and industry trends, reinforcing the organization's ability to thrive in a dynamic environment.

## **SUMMATIVE ASSESSMENT ACTIVITY 3: PRACTICAL ASSIGNMENT**

### **1. Completed Coach and Coachee Evaluation**



### **2. Completed Coachee Assistance Log**



### **3. Completed Coachee Workplace Log**



### **4. A brief synopsis of how you approached the process and any challenges and or conflicts that occurred were dealt with.**

In approaching the coaching process for the First Line Manager, I began by carefully reviewing the job profile and position weights to identify priority areas for development. I then drafted a comprehensive coach plan and schedule, ensuring alignment with the identified needs and competencies. During the one-on-one meeting with the Coachee, I explained the coaching process thoroughly, emphasizing the importance of active participation and commitment to the plan. Throughout the implementation phase, I maintained regular meetings as scheduled, keeping the coaching pack documentation up to date with relevant comments and feedback.

Challenges and conflicts were addressed promptly and transparently, fostering open communication between myself and the Coachee. When challenges arose, such as resistance to certain aspects of the plan or difficulties in implementing new strategies, we worked together to find solutions and adapt the approach as needed. Additionally, I provided ongoing support and encouragement to the Coachee, helping them stay motivated and focused on their development goals. Overall, the process was characterized by collaboration, flexibility, and a shared commitment to achieving success.



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## **SUMMATIVE ASSESSMENT ACTIVITY 4: PRACTICAL ASSIGNMENT**

1. The Performance Standard that outlines the goals, objectives, and deliverables for the month.

### **Performance Standard for SystemDevs Team:**

Team Leader: Philasande Bhani

#### **Team Members:**

Philasande Bhani (Team Leader), ✓

Rebert Wilson (Software Developer),

Tracy Wiliams (Software Developer),

John Sanns (System Analyst), ✓

Nolovo Mbembe (Software Tester)

#### **Goals:**

1. Project Completion: Ensure all assigned projects are completed within specified deadlines.
2. Quality Assurance: Maintain a high standard of work quality, adhering to industry best practices and organizational guidelines. ✓
3. Team Collaboration: Foster effective communication and collaboration among team members to enhance productivity and problem-solving.

#### **Objectives:**

1. Project Completion Rate: Achieve a minimum project completion rate of 95% for all assigned tasks by the end of the month.
2. Quality Assurance Score: Maintain an average quality assurance score of 4.5 out of 5, based on peer reviews and client feedback. ✓
3. Team Collaboration Index: Ensure active participation in team meetings and discussions, with each team member contributing valuable insights and suggestions for improvement.

#### **Deliverables:**

1. Completed Projects: Deliver all assigned projects according to agreed-upon specifications and timelines.
2. Quality Documentation: Provide comprehensive documentation for all completed projects, including code documentation, test cases, and user manuals. ✓
3. Meeting Attendance: Attend all scheduled team meetings and actively participate in discussions and brainstorming sessions.

T.N.

2. Minutes of the meeting had with the team to discuss the expected performance.

### Meeting Minutes

**Meeting Title:** Performance Standards Discussion Meeting

**Date:** 06 February 2024

**Location:** Springbok Boardroom

#### Attendees:

Philasande Bhani (Team Leader),

Rebert Wilson (Software Developer),

Tracy Wiliams (Software Developer),

John Sanns (System Analyst),

Nolovo Mbembe (Software Tester)

#### Agenda:

1. Review of Performance Standards
2. Discussion of Expectations
3. Feedback and Suggestions

#### Minutes:

##### 1. Review of Performance Standards:

- Philasande Bhani reviewed the Performance Standards drafted for SystemDevs Team, outlining the goals, objectives, and deliverables for the month.
- Each team member was provided with a copy of the Performance Standard document for reference.

##### 2. Discussion of Expectations:

- Team members were encouraged to provide feedback and suggestions regarding the outlined performance standards.
- Questions and concerns raised by team members were addressed by Philasande Bhani to ensure clarity and understanding.

##### 3. Feedback and Suggestions:

- Team members expressed their agreement with the overall goals and objectives outlined in the Performance Standards.
- Suggestions for improvement and refinement of specific objectives were discussed and noted for consideration.

#### Action Items:

T.N.

- Philasande Bhani to incorporate any suggested revisions into the final version of the Performance Standards document.
- Team members to review the finalized Performance Standards document and provide any additional feedback by 12 February 2024.

**Next Steps:**

- Philasande Bhani to circulate the finalized Performance Standards document to all team members for reference.

Closing Remarks: The meeting concluded with a reaffirmation of the team's commitment to achieving the outlined performance standards and contributing to the success of SystemDevs Team.

Prepared By: John Sanis.

Approved By: Philasande Bhani.

3. Monitor results of performance standards against actual performed.

**Performance Monitoring Report - SystemDevs Team**

Date Range: 06 February 2024 – 12 February 2024

Team Leader: Philasande Bhani

**Performance Standards:**

1. Project Completion Rate: Achieve a minimum project completion rate of 95% for all assigned tasks by the end of the month.
2. Quality Assurance Score: Maintain an average quality assurance score of 4.5 out of 5, based on peer reviews and client feedback.
3. Team Collaboration Index: Ensure active participation in team meetings and discussions, with each team member contributing valuable insights and suggestions for improvement.

**Actual Performance:**

1. Project Completion Rate: 92%

Despite efforts to meet deadlines, unexpected technical challenges led to a slight decrease in the project completion rate. Additional support and resources have been allocated to address these challenges for the upcoming month.

2. Quality Assurance Score: 4.7 out of 5

Team members consistently delivered high-quality work, exceeding the target quality assurance score. Positive feedback was received from both peer reviews and clients, indicating a strong commitment to maintaining quality standards.

3. Team Collaboration Index: 85%

While team members attended scheduled meetings regularly, there were instances of limited participation and contribution during discussions. Efforts will be made to enhance communication and collaboration among team members to improve the team collaboration index.

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**Key Observations:**

- Overall, SystemDevs Team demonstrated strong performance in meeting quality standards and project deliverables.
- Opportunities for improvement include addressing challenges related to project completion rate and enhancing team collaboration.

**Action Items:**

- Provide additional support and resources to address technical challenges impacting project completion rate.
- Implement strategies to enhance communication and collaboration among team members, such as regular check-ins and brainstorming sessions.

**Next Steps:**

- Schedule a follow-up meeting with SystemDevs Team to discuss performance results and action plans for improvement.
- Continue monitoring performance against established standards and adjust strategies as needed to ensure alignment with organizational goals.

Prepared By: John Sanns

Approved By: Philasande Bhani

**4. Email as confirmation that you communicated the monitoring system to the team.**

Confirmation: Performance Monitoring System Implementation

Philasande Bhani <pbhanina@gmail.com>  
to Robert.Wilson, Tracy.Wiliams, John.Sanns, Noluvo.Mbembe ▾

Dear SystemDevs Team,

I hope this email finds you well.

I am writing to confirm that we have implemented a performance monitoring system to track our progress against the performance standards outlined for SystemDevs Team.  
This system will enable us to assess our performance regularly and identify areas for improvement to ensure we meet our goals and objectives effectively.

The performance monitoring system will involve:

- Regular tracking of key performance indicators (KPIs) such as project completion rate, quality assurance score, and team collaboration index.
- Analysis of actual performance against the established standards to identify deviations and areas for improvement.
- Action planning to address any performance gaps and enhance overall team performance.

Please note that your participation and cooperation in this monitoring process are essential for its success. I encourage you to actively engage with the system and provide feedback as we work towards achieving our goals as a team.

If you have any questions or concerns regarding the performance monitoring system, please feel free to reach out to me directly.

Thank you for your attention to this matter.

Best regards,

Philasande Bhani  
Team Leader, SystemDevs Team

T.N.

5. Minutes of the meeting showing discussions held during the performance review meeting – ensuring to include agreed actions, findings of both positive and negative aspects of the performance.

### Meeting Minutes: Performance Review Meeting

**Date:** 13 February 2024

**Location:** Lion Board Room.

**Attendees:**

Philasande Bhani (Team Leader),

Rebert Wilson (Software Developer),

Tracy Wiliams (Software Developer),

John Sanns (System Analyst),

Noluvo Mbembe (Software Tester)

**Agenda:**

1. Review of Performance Against Standards
2. Discussion of Positive and Negative Aspects
3. Agreement on Corrective Actions

**Minutes:**

1. Review of Performance Against Standards:

- Philasande Bhani presented the team's performance against the established standards, highlighting key metrics such as project completion rate, quality assurance score, and team collaboration index.
- Actual performance was compared to the performance standards, identifying areas of achievement and areas needing improvement.

2. Discussion of Positive and Negative Aspects:

**Positive Aspects:**

- High quality assurance score, indicating consistent delivery of high-quality work.
- Strong collaboration during project execution, fostering teamwork and problem-solving.

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**Negative Aspects:**

- Slight shortfall in project completion rate, attributed to technical challenges and resource constraints.
- Room for improvement in team collaboration index, with opportunities to enhance participation and contribution during meetings.

**3. Agreement on Corrective Actions:**

**Agreed Actions:**

- Provide additional support and resources to address technical challenges impacting project completion rate.
- Implement strategies to enhance communication and collaboration among team members, such as regular check-ins and brainstorming sessions.
- Responsibilities were assigned to team members for the implementation of corrective actions.

**Action Items:**

- Philasande Bhani to oversee the implementation of corrective actions and provide necessary support to team members
- Team members to actively participate in the improvement initiatives and provide feedback as needed.

**Next Steps:**

- Schedule follow-up meetings to monitor progress on corrective actions and reassess performance against standards.
- Continue fostering a culture of continuous improvement and collaboration within SystemDevs Team.

**Closing Remarks:**

The meeting concluded with a commitment from all team members to work together towards achieving the established performance standards and addressing any performance gaps identified.

Prepared By: John Sanns

Approved By: Philasande Bhani

T.N.

6. Complete Review Evaluation Checklist completed by each member.

Review Evaluation Checklist

**1. Philasande Bhani (Team Leader):**



**2. Rebert Wilson (Software Developer):**



**3. Tracy Wiliams (Software Developer):**



**4. John Sanns (System Analyst):**



**5. Noluovo Mbembe (Software Tester):**



7. Performance Management synopsis.

**a. Methods of Formulating Key Result Areas and Performance Standards:**

- Key result areas (KRAs) and performance standards are formulated through a structured process involving input from various stakeholders, including team members, supervisors, and organizational leaders.
- Methods such as Position Analysis and Training Needs Analysis are utilized to identify core responsibilities, skill requirements, and performance expectations for each role.
- Performance standards are developed based on SMART criteria (Specific, Measurable, Achievable, Relevant, Timebound) to ensure clarity and effectiveness.

**b. Types of Monitoring Performance:**

T.N.

Monitoring performance involves various methods to track progress against established standards:

- Regular check-ins: Scheduled meetings or discussions between supervisors and team members to review progress and address challenges.
- Performance metrics: Tracking key performance indicators (KPIs) such as project milestones, quality of work, and productivity levels.
- Peer review: Gathering feedback and assessment from colleagues or team members to provide a well-rounded perspective on performance.
- 360degree feedback: Soliciting feedback from multiple sources, including supervisors, peers, and subordinates, to provide a comprehensive view of performance.

### **c. The Process Used to Conduct the Performance Review:**

The performance review process typically involves several steps:

- Preparation: Gathering relevant performance data, including goal attainment, KPIs, and feedback from stakeholders.
- Meeting setup: Scheduling a meeting with the employee to discuss their performance and provide feedback.
- Review discussion: Discussing strengths, areas for improvement, and progress towards goals. This may include reviewing specific examples of performance.
- Goal setting: Setting new goals or objectives for the upcoming period based on the review discussion.
- Documentation: Documenting the performance review discussion, including agreed-upon actions and goals for future reference.

### **d. Methods of Giving Constructive Feedback:**

Effective feedback should be:

**Specific:** Providing detailed examples and observations to support feedback.

**Timely:** Delivering feedback in a timely manner, ideally soon after the observed behaviour or performance.

**Balanced:** Recognizing both strengths and areas for improvement to maintain morale and motivation.

**Actionable:** Offering suggestions or strategies for improvement to help the individual grow and develop.

**Ongoing:** Providing regular feedback throughout the performance review period to facilitate continuous improvement.

## JOB ANALYSIS TEMPLATE

ANALYSIS PERFORMED BY			
<b>ANALYST NAME</b>	Philasande Bhani	<b>ANALYST TITLE</b>	Executive Manager
<b>PHONE</b>	0782141216	<b>EMAIL</b>	philasandeB@cappayments.co.za
<b>SUBMITTED TO</b>	Mosima Leshika	<b>DATE COMPLETED</b>	03 January 2024
TASKS			
<b>CORE WORK TASKS</b> Identified by employer	Overseeing daily operations of the Internal Systems Department. Leading and managing a team of system administrators and support staff.		
<b>CORE WORK TASKS</b> Identified by employer	Developing and implementing departmental policies and procedures. Ensuring compliance with relevant regulations and standards. Collaborating with other department heads to optimize internal processes and systems.		
<b>JOB-RELATED TASKS</b> Identified during negotiation	Conducting performance evaluations for team members. Providing training and development opportunities for staff. Resolving escalated issues and conflicts within the department. Reporting departmental performance metrics to senior management.		
PERFORMANCE OF TASKS			
PHYSICAL DEMANDS		SENSORY/COMMUNICATION DEMANDS	
Lifting	Occasionally, when moving equipment or supplies.	Vision	Continuous, for reading reports and analyzing data.
Standing	Infrequently, during meetings or presentations.	Hearing	Continuous, for communication with team members and senior management.
Continuous Movement	Occasionally, within the office environment.	Speaking	Continuous, for leading meetings and discussions.
Rapid Movement	Occasionally, when addressing urgent issues or emergencies.	Judgment	Continuous, for making strategic decisions regarding departmental operations.
Walking	Occasionally, within the office environment.	ACADEMIC DEMANDS	
Climbing	Occasionally, within the office environment.	Reading	Continuous, for staying informed about industry trends and best practices.
Stooping	Occasionally, within the office environment.	Writing	Continuous, for preparing reports, emails, and documentation.
Crawling	None	Math	Occasionally, for analyzing financial data and budgeting.
JOB SUMMARY			
<p>The First Line Manager within the Cappayments, Internal Systems department is responsible for overseeing daily operations, managing a team of programmers, and ensuring productivity targets are met. This role involves coordinating workflow, providing guidance and support to the programming team, and resolving any operational issues that arise.</p>			

GENERAL STRENGTH / ENDURANCE REQUIREMENTS	Ability to remain composed and focused during high-pressure situations. Endurance to work long hours when necessary to meet deadlines.
PACE OF WORK	Fast-paced environment with frequent interruptions and changing priorities.
POTENTIALLY DANGEROUS JOB ASPECTS	Minimal, as the job primarily involves office-based tasks and management responsibilities.
CRITICALLY IMPORTANT JOB ASPECTS	Leadership and decision-making skills to effectively manage the department and achieve organizational goals
PROBATIONARY PERIOD LEARNING CURVE ESTABLISHED	Yes, typically a 3-month probation period with ongoing training and evaluation.
WORKSITE CONSIDERATIONS Specific attire, safety equipment, etc.	Professional attire suitable for leadership role. Safety equipment not required.
TOOLS EMPLOYED	Project management software such as Asana or Trello. Communication tools like Slack or Microsoft Teams.
EQUIPMENT EMPLOYED	Desktop or laptop computer with necessary software installed. Office equipment such as printers and scanners.
MATERIALS EMPLOYED	Departmental policies and procedures manuals. Reports and documentation related to departmental operations.
JOB SPECIFIC TERMINOLOGY	Management principles and practices. Organizational development concepts. Regulatory compliance terms related to internal systems.
ENVIRONMENTAL WORK CONDITIONS DESCRIPTION	Indoor office environment with controlled temperature and lighting. Occasional travel may be required for meetings or conferences.
TRAINING STRATEGIES	
Who typically provides training to new hires?	Co-workers / Supervisors assigned to training.
Assigned Trainer name and availability	Trainer: John Smith Availability: Monday to Friday, 9:00 AM - 5:00 PM.

Coworkers / Supervisors assigned to training and availability	<b>Trainer:</b> John Smith <b>Executive Manager:</b> Philasande Bhani, <b>Availability:</b> Monday to Friday, 9:00 AM - 5:00 PM.
Description of Training Strategies	Training typically involves a combination of on-the-job training (shadowing experienced team members), formal classroom training, and online learning modules. New hires will be paired with experienced team members for hands-on training and will also participate in group training sessions to cover specific job functions and company policies.
Unwritten Rules specific to the position and/or setting	There are several unwritten rules that are important for success in this role, including the importance of clear communication with team members, the emphasis on meeting deadlines, the expectation of proactive problem-solving, and the necessity of maintaining confidentiality with sensitive information.
Willingness of Coworkers / Supervisors to provide support	Co-workers and supervisors are generally willing to provide support and guidance to new hires. They understand the importance of helping new team members acclimate to the role and are committed to fostering a supportive and collaborative work environment.

WORKSITE CULTURE	
EMPLOYER'S CONCERN FOR QUALITY	High emphasis on quality assurance and compliance with industry standards.
EMPLOYER'S NEED FOR PRODUCTIVITY	Productivity is essential, with a focus on achieving departmental goals and objectives efficiently.
FLEXIBILITY / RIGIDITY OBSERVED	Flexibility in adapting to changing priorities and organizational needs.

DUTIES AND RESPONSIBILITIES	PERFORMANCE FREQUENCY	% of TIME
Departmental leadership and management	Daily	40
Team development and training	As needed	20
Policy development and implementation	Weekly	15
Collaboration with other departments	As needed	15
Reporting and performance evaluation	Monthly	10

## Performance Development Plan (PDP) Implementation Action Plan

**Employee Name:** John Sanns

**Position:** System Analyst

**Department:** Internal Systems

**PDP Period:** February 2024 - May 2024

### Goal:

To successfully implement the identified performance and developmental goals outlined in John Sanns's PDP.

### Actions:

#### 1. Training and Workshop Attendance:

- **Objective:** Attend scheduled training sessions and workshops to acquire necessary skills and knowledge.
- **Responsible Party:** John Sanns
- **Timeline:**
  - Time Management Workshop: February 20, 2024
  - Leadership Training: February 22, 2024
  - Presentation Skills Course: February 28, 2024
- **Progress Tracking:** Attendance sheets and certificates of completion.

#### 2. Implementing New Tools and Processes:

- **Objective:** Introduce project management software and implement weekly team meetings.
- **Responsible Party:** John Sanns
- **Timeline:**
  - Project management software implementation: February 12, 2024
  - Initiate weekly team meetings: February 12, 2024
- **Progress Tracking:** Usage reports for project management software, meeting agendas, and attendance records for team meetings.

#### 3. Review and Update Team Policies:

- **Objective:** Review existing team policies and update them to ensure compliance with company standards.
- **Responsible Party:** John Sanns
- **Timeline:** February 16, 2024

- **Progress Tracking:** Documented policy revisions and approval from relevant stakeholders.

#### 4. Regular Performance Discussions:

- **Objective:** Conduct bi-weekly performance discussions to review progress and provide feedback.
- **Responsible Party:** John Sanns, Direct Supervisor
- **Timeline:** Starting February 14, 2024 and continuing every two weeks thereafter.
- **Progress Tracking:** Meeting minutes documenting discussions, feedback provided, and any adjustments to the PDP.

#### Evaluation and Review:

- **Responsible Party:** John Sanns, Direct Supervisor, HR Manager
- **Timeline:**
  - Initial review: After completion of the first training session (February 20, 2024)
  - Ongoing review: Every two weeks during performance discussions
  - Final review: End of PDP period (May 2024)
- **Progress Tracking:** Review of progress against set goals, feedback from performance discussions, and any adjustments made to the action plan.

#### Feedback and Adjustments:

- **Objective:** Gather feedback from John Sanns, Direct Supervisor, and HR Manager to assess the effectiveness of the implemented actions and make any necessary adjustments.
- **Responsible Party:** John Sanns, Direct Supervisor, HR Manager
- **Timeline:**
  - Continuous throughout the PDP period
  - Formal feedback sessions scheduled as needed based on progress and challenges encountered.
- **Progress Tracking:** Documented feedback sessions, adjustments made to the action plan, and any revisions to the PDP.

Applicant Name	Department	Current Position	Qualification	Experience
Themba Zwane	Marketing	Senior Analyst	Bachelor's in Computer Science, 5 years of programming experience	7 years
Emily Jonson	Operations	Programmer	Bachelor's in Software Engineering, 3 years of programming experience	4 years
Michael Davis	IT	Developer	Bachelor's in Computer Engineering, 4 years of programming experience	6 years
Sarah Brown	Finance	Software Engineer	Bachelor's in Computer Science	3 years
Robert Johnson	HR	Systems Analyst	Bachelor's in Information Technology	5 years
Phumlanzi Zondi	Sales	Programmer	Bachelor's in Computer Science	2 years
Zolani Mkhiva	IT Manager	Executive Manager	Information Technology	2 years
Bryan Mooler	HR	HR Manager	Human Resources	3 years
Lufuno Makhiqi	Civil Engineering	Manager	Diploma in Civil Engineering	5 years

T.N.

# COACHEE PDP & GOAL EVALUATION Template

Coachee Name and Title	John Sanns, System Analyst	Evaluation for the period:	3 weeks
Supervisor Name and Title	Robert Wiliams	Department:	Oappayments, Internal Systsem

The evaluation below deems as a contractual agreement between yourself the Coachee and your appointed Coach to ensure support, guidance, and assistance during the mentioned evaluation period. Any failure to comply with the said agreement and or not meeting of deadlines for activities, attending agreed meeting dates will result in an analysis of performance and removal from the program. By signing and agreeing to the Coach plans below you commit to your full loyalty and understand that the coaching service is for your benefit ONLY.

## ACHIEVEMENTS, ACCOMPLISHMENTS, AND RESPONSIBILITIES (completed by Coach)

John Sanns, System Analyst, has successfully overseen the programming team's operations, ensuring productivity, compliance, and

collaboration for organizational success. He has effectively set performance goals and objectives for the programmers, monitored

their productivity and performance, and resolved conflicts within the team. Additionally, John has trained and developed programmers

to enhance their skills and capabilities, ensuring alignment with company policies and procedures.

## STRENGTHS/WEAKNESSES (completed by coachEE)

STRENGTHS	WEAKNESSES
<input checked="" type="checkbox"/> Determined <input checked="" type="checkbox"/> Dedicated <input checked="" type="checkbox"/> Versatile <input checked="" type="checkbox"/> Creative <input checked="" type="checkbox"/> Enthusiasm <input type="checkbox"/> Patience <input type="checkbox"/> Discipline <input type="checkbox"/> Motivated <input type="checkbox"/> Communicator <input checked="" type="checkbox"/> Team Player <input type="checkbox"/> Goal orientated	<input type="checkbox"/> Being too critical <input checked="" type="checkbox"/> Procrastination <input checked="" type="checkbox"/> Impatient <input checked="" type="checkbox"/> Nervous around people <input type="checkbox"/> Aggressive debater <input type="checkbox"/> People pleaser <input type="checkbox"/> Lack time management <input checked="" type="checkbox"/> Indecisive <input type="checkbox"/> Bad loser <input checked="" type="checkbox"/> Sensitive <input type="checkbox"/> Overload of responsibilities

<input type="checkbox"/> Self-Confident	<input type="checkbox"/> Resistance to change
<input type="checkbox"/> Ability to prioritise	<input type="checkbox"/> Over idealistic
<input type="checkbox"/> Well-organised	<input type="checkbox"/> Too selfless
<input type="checkbox"/> Assuming responsibility	
<input type="checkbox"/> Cope with failure	
<input type="checkbox"/> Sound decision maker	
<input type="checkbox"/> Supportive	
<input type="checkbox"/> Reliable	
<input type="checkbox"/> Observant	

### AREAS FOR DEVELOPMENT (completed by coach)

SKILL	ATTITUDE	KNOWLEDGE
<input type="checkbox"/> Workplace Activities	<input type="checkbox"/> Emotional Intelligence	<input type="checkbox"/> Finance
<input type="checkbox"/> Interpersonal Relations	<input checked="" type="checkbox"/> Conflict Handling	<input checked="" type="checkbox"/> How to solve problems?
<input type="checkbox"/> Networking	<input type="checkbox"/> Time Management	<input type="checkbox"/> How to think critically?
<input type="checkbox"/> Administration	<input type="checkbox"/> Assertion	<input type="checkbox"/> How to organize?
<input checked="" type="checkbox"/> Management		<input type="checkbox"/> How to delegate? <span style="color:red;">✓</span>
<input type="checkbox"/> Control		<input type="checkbox"/> Understand administration principles
<input type="checkbox"/> Delegation		<input type="checkbox"/> Create a better self esteem
<input type="checkbox"/> Organising		<input type="checkbox"/> How to handle conflict?
<input type="checkbox"/> Problem Solving		<input type="checkbox"/> How to manage myself?
		<input checked="" type="checkbox"/> Filing
		<input type="checkbox"/> How to take Minutes of meetings
		<input type="checkbox"/> How to manage a team?
		<input type="checkbox"/> How to manage time?
		<input type="checkbox"/> How to be assertive?
		<input type="checkbox"/> Creating interpersonal relations
		<input checked="" type="checkbox"/> Reporting writing
		<input type="checkbox"/> Strategic Management

		<input type="checkbox"/> Human Resource Management
		<input type="checkbox"/> Oral communication
		<input type="checkbox"/> Business Writing

Indicate the area in which the coachee should be focusing on from the above: i.e., from the skills and attitude columns, there should be at least one area from knowledge that will apply.

The indicator on growth will be the necessary knowledge the learner needs to learn and enhance the attitude toward obtaining the skill to increase performance.

1. The coachee should prioritize enhancing their conflict handling skills to effectively manage and

resolve conflicts within the team and promote a harmonious work environment.

2. Addressing resistance to change is crucial for the coachee to adapt to new processes, procedures, and initiatives

within the organization. Developing a more open and flexible attitude toward change will contribute to their overall

effectiveness as a manager.

3. Acquiring knowledge on effective problem-solving techniques will enable the coachee to approach challenges and issues with a structured and analytical mindset. This knowledge will enhance their ability to identify, analyze, and implement solutions to complex problems, ultimately improving team performance and productivity.

## GOALS AND OBJECTIVES DURING THIS EVALUATION PERIOD – completed by coach

- Set SMART Goals

Improve conflict resolution skills through conflict handling workshops.

Address resistance to change by attending change management training.

Enhance problem-solving abilities by acquiring knowledge on effective problem-solving techniques.

### Evaluation (completed by coachee)

- Do you agree with the above goal? Yes No
- Are you satisfied with the evaluation done on areas to improve? Yes No

If you disagree, explain, and discuss what you are not in agreement with, with your coach.

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## CAREER DEVELOPMENT PLAN (completed by coach)

Development Objectives Skills, Knowledge or Attitude	Activities/Training to achieve the objectives	Support/Resources needed to meet objective	Target Date for achievement	Actual Date achieved
Participate in change management training sessions. Acquire knowledge on effective problem-solving techniques. Change Management, Problem Solving	Attend change management and problem-solving workshops.	Access to relevant training programs.	Change Management: 22/02/2024 Problem Solving: 28/02/2024	Change Management: 22/02/2024 Problem Solving: 28/02/2024
Enhance conflict resolution skills. Address resistance to change and improve problem-solving abilities. Conflict Handling, Change Management, Problem Solving	Attend conflict handling workshops.	Access to relevant training programs.	Conflict Handling: 20/02/2024	Conflict Handling: 20/02/2024

Meetings will be held on day after target dates set for achievement of the PDP above.

### Coachee SIGNATURE/COACH signature

Signature		Signature	
Name	John Sanns	Name	Robert Williams
Date	22 Feb 2024	Date	22 Feb 2024

This section is completed during/after the coaching process and observations.

Coachee Name and Title	John Sanns, System Analyst	Evaluation for the period:	3 weeks
Coach Name and Title	Robert Wiliams	Department:	Cappayments, Internal System

## **FEEDBACK ON ACHIEVEMENTS, ACCOMPLISHMENTS, AND RESPONSIBILITIES (COMPLETED BY COACH)**

### **How well did the learner respond to learning?**

The learner responded positively to learning, demonstrating enthusiasm and dedication in acquiring new skills and knowledge.

They actively participated in training sessions and applied learned concepts effectively in their work tasks.

### **Where there any changes in behavior?**

Yes, there were noticeable changes in the learner's behavior. They exhibited improved problem-solving abilities, conflict resolution skills, and a more proactive approach to addressing challenges. Additionally, they demonstrated increased adaptability and openness to change, which positively impacted team dynamics and productivity.

### **Any additional suggested learning areas to improve this evaluation?**

While the learner has made significant progress in the areas identified, further development in strategic decision-making and leadership skills could enhance their effectiveness as a manager. Additionally, ongoing training in communication and stakeholder management would contribute to their professional growth and ability to navigate complex organizational environments.

## **Reflection on ACHIEVEMENTS, ACCOMPLISHMENTS (COMPLETED BY COACHEE)**

### **✓ What did you achieve during the coaching process? Explain**

During the coaching process, I achieved significant growth in my problem-solving abilities, conflict resolution skills, and change management competencies. I developed a deeper understanding of effective leadership practices and learned practical strategies for enhancing team collaboration and productivity.

### **✓ How will this help during your business day?**

During the coaching process, I achieved significant growth in my problem-solving abilities, conflict resolution skills, and change management competencies. I developed a deeper understanding of effective leadership practices and learned practical strategies for enhancing team collaboration and productivity.

### **✓ Which area/s would you still like to develop?**

While I have made significant progress in various areas, I would like to further develop my strategic decision-making skills and refine my communication abilities. Strengthening these areas will allow me to make more informed decisions, effectively communicate objectives and expectations, and foster stronger relationships with colleagues and stakeholders.

This section is completed during/after the coaching process and observations.

### Evaluation (*COMPLETED BY COACHEE*)

**Coach Rating – On a scale from 1 – 5 (1 being the good and 5 excellent) how well did the coach:**

Which areas could the coach improve on?

RATING	1	2	3	4	5
Support You					X
Understand your needs					✓X
Give efficient and effective feedback					X
Express patience					X

### COACH EVALUATION (*COMPLETED BY COACH*)

How well did you execute the following with the coachee?

RATING	1	2	3	4	5
Support You					X
Understand your needs				✓	X
Give efficient and effective feedback					X
Express patience				X	

This section is completed during/after the coaching process and observations.

**Indicate your strengths and weaknesses during the process:**

<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<input type="checkbox"/> Determined <input checked="" type="checkbox"/> Dedicated <input checked="" type="checkbox"/> Versatile <input type="checkbox"/> Creative <input checked="" type="checkbox"/> Enthusiasm <input type="checkbox"/> Patience <input type="checkbox"/> Discipline <input type="checkbox"/> Motivated <input type="checkbox"/> Communicator <input type="checkbox"/> Team Player <input checked="" type="checkbox"/> Goal orientated <input type="checkbox"/> Self-Confident <input type="checkbox"/> Ability to prioritise <input checked="" type="checkbox"/> Well-organised <input type="checkbox"/> Assuming responsibility <input type="checkbox"/> Cope with failure <input type="checkbox"/> Sound decision maker <input type="checkbox"/> Supportive <input type="checkbox"/> Reliable <input type="checkbox"/> Observant	<input type="checkbox"/> Being too critical <input checked="" type="checkbox"/> Procrastination <input checked="" type="checkbox"/> Impatient <input type="checkbox"/> Nervous around people <input type="checkbox"/> Aggressive debater <input type="checkbox"/> People pleaser <input checked="" type="checkbox"/> Lack time management <input type="checkbox"/> Indecisive <input type="checkbox"/> Bad loser <input checked="" type="checkbox"/> Sensitive <input type="checkbox"/> Overload of responsibilities <input checked="" type="checkbox"/> Resistance to change <input type="checkbox"/> Over idealistic <input type="checkbox"/> Too selfless

What would you do to improve performance?

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This section is completed during/after the coaching process and observations.

### OVERALL COACH EVALUATION (COMPLETED BY COACH)

Criteria	Coachee Score	Coach Score	Overall Score	Percentage
<b>Supportive</b>	4/5	5/5	4.5/5	90% 
<b>Understand Needs</b>	4/5	4/5	4/5	80% 
<b>Give Efficient and Effective Feedback</b>	5/5	4/5	4.5/5	90%
<b>Being Patient</b>	3/5	4/5	3.5/5	70%
<b>Overall Percentage</b>				82.5%

**Percentage** = Overall Score / 10 \* 100

**Overall Percentage** = SUGB/4 \* 100

**25% and less** on individual scoring constitutes improvement and growth areas further (if necessary) CAREER DEVELOPMENT PLAN (completed by coach)

Development Objectives Skills, Knowledge or Attitude	Activities/Training to achieve the objectives	Support/Resources needed to meet objective	Target Date for achievement	Actual Date achieved
Participate in change management training sessions. Change Management Skills	Attend change management training sessions	Access to relevant training programs	03/03/2024	03/03/2024 
Acquire knowledge on effective problem-solving techniques. Problem-Solving Skills	Enroll in a problem-solving workshop	Guidance and support from mentor	07/03/2024	07/03/2024 
Enhance conflict resolution skills. Conflict Resolution Skills	Attend conflict resolution workshops	Access to conflict resolution resources	12/03/2024	12/03/2024

**Coachee SIGNATURE**  
**supervisor signature**

Signature		Signature	
Name	[Employee name] John Sanns	Name	[Supervisor name] Cleo Cole
Date	Click here to enter a date. 22 Feb 2024	Date	[End date] 22 Feb 2024 

# Coachee Assistance Log

Date	Discussion	Improvements/Assistance given	Coachee Acceptance Signature	Coach Authenticated
2024-01-15	Discussed strategies for time management.	Provided tips on prioritization and task organization.	Jsanns	Rwilliams
2024-01-22	Addressed challenges in team communication.	Offered techniques for effective communication and conflict resolution.	Jsanns 	Rwilliams
2024-02-05	Reviewed progress on goal achievement.	Identified areas for improvement and set action plans.	Jsanns	Rwilliams

# Coachee Workplace Activity Log Template

The questions in the workplace activity should be adapted to the areas identified in the Coaching Evaluation Plan.

i.e., if the Coachee requires interpersonal skills a question like:

How well were you able to relate to co-workers and colleagues. Workplace Activity questions are not limited and should cover all the areas identified in the plan.

Supervisor Name: Cleo Cola

Supervisor Signature c.cole

Date: 22 Feb 2024

Workplace activity	How often did/do you perform this activity? i.e., daily, weekly, monthly	Rate			Signature	Needs Assistance!	Supervisor Rating
		Almost?	Can't	Need Assistance!			
Interpersonal Skills Development	Weekly	X			c.cole	X	
Conflict Resolution Practice	Daily	X			c.cole	X	X
Time Management Techniques Application	Daily	X			c.cole	X	
Effective Communication with Team Members	Daily	X			c.cole	X	
Strategic Decision Making Exercises	Weekly	X			c.cole	X	



## **Personal Reflection**

Give a personal reflection on what went well for you during the above activities and areas of remedial improvement, also refer to types of tools, equipment, and materials that you used to complete the activities.

During the activities, I successfully enhanced interpersonal skills and time management through weekly exercises, utilizing digital tools for task prioritization. However, I identified the need for improvement in conflict resolution and strategic decision-making. Despite daily practice, implementing effective conflict resolution strategies remained challenging, indicating a need for further training. ✓ Similarly, while engaging in weekly strategic decision-making exercises,

I recognized the need to broaden my knowledge in this area. Going forward, I plan to enroll in additional workshops and seek mentorship to strengthen these skills. Supervisor Comments: The coachee has shown dedication in improving interpersonal skills and time management. However, there is room for growth in conflict resolution and strategic decision-making. Continued commitment to learning and seeking mentorship will lead to further development.

## **SUPERVISOR COMMENTS:**

The coachee has shown commendable dedication to improving their interpersonal skills and time management abilities. However, there is room for growth in conflict resolution techniques and strategic decision-making. Continued commitment to learning and seeking mentorship will undoubtedly lead to further professional development and success

**REMEDIAL /  
IMPROVEMENT  
AREAS**

Enhance time management skills to meet project deadlines effectively.

Improve conflict resolution techniques to address team disagreements more

Develop stronger leadership communication to provide clearer direction to team members.

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c.cole

   
SUPERVISOR SIGNATURE

DATE: 22 Feb 2024

Rwilliams

COACH SIGNATURE

Jsamns

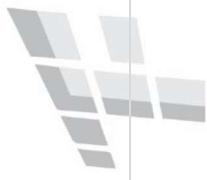
COACHEE SIGNATURE

**TN**

**3**

Evidence Template Coachee Workplace Log Cluster 4 Generic Management Level 5

Learner Initial: P



Applicant Name	Department	Current Position	Qualification	Experience	Shortlisted	Interview Date	Time
Themba Zwane	Marketing	Senior Analyst	Bachelor's in Computer Science, 5 years of programming experience	7 years	Yes	15-Jan-24	10:00AM - 11:00AM
Emily Jonson	Operations	Programmer	Bachelor's in Software Engineering, 3 years of programming experience	4 years	No	None	None
Michael Davis	IT	Developer	Bachelor's in Computer Engineering, 4 years of programming experience	6 years	Yes	15/01/24	11:00AM - 12:00PM
Sarah Brown	Finance	Software Engineer	Bachelor's in Computer Science	3 years	No	None	Not Selected
Robert Johnson	HR	Systems Analyst	Bachelor's in Information Technology	5 years	Yes	15/01/24	13:00PM - 14:00PM
Phumlaniz Zondi	Sales	Programmer	Bachelor's in Computer Science	2 years	Not	None	None
Zolani Mkhiva	IT Manager	Executive Manager	Information Technology	2 years	Not	None	None
Bryan Mooler	HR	HR Manager	Human Resources	3 years	Not	None	None
Lufuno Makhiqi	Civil Engineering	Civil Engineer Manager	Diploma in Civil Engineering	5 years	Not	None	None

T.N.

## ***Interview Form Template***

<b>Position applied for</b>	First Line Manager
<b>Applicant's name</b>	Themba Zwane
<b>Date &amp; time of interview</b>	January 17, 2024.

<b>Interviewers</b>	<b>Name</b>	<b>Designation</b>
Interviewer no. 1	Mosima Leshika	HR Manager
Interviewer no. 2	Caron Elferink	Department Manager
Interviewer no. 3	Philasande Bhani	Software Developer
Interviewer no. 4		

### **Preparation checklist**

- Review applicant's curriculum vitae/application form, highlighting any specific information/area/duties, which need to be explored in more detail during the interview.
- Review the job/incumbent specifications, plus the identified dimensions and associated structured questions.
- Ensure all interviewers present have been briefed about their role, how the interview is to be conducted, the dimensions and questions, and the rating process.
- Ensure that a suitable venue is available.
- Ensure that all applicants have been informed as to the date, time and venue
- Determine the time available.

### **Outline for opening the Interview:**

- Greet applicant, giving name and position of all interviewers.
- Break the ice by asking some general questions, i.e., about their journey.
- Explain the interview purpose.
- Describe the interview plan.
- Check to see if applicant has any questions.

### **Key background Review**

- Educational Background (only if not provided sufficiently on résumé)

<b>Educational Qualifications</b>	Bachelor's in Computer Science
On-Job-Training Computer Literacy	TLearnership (Generic Management NQF0, Training Force) Word, Excel - Intermediate type text here

- Work Background

<b>Job Experience No. 1</b>	Senior Analyst at Marketing Department
Main Responsibilities/Duties	Overseeing data analysis projects.
Reason for leaving	Seeking career advancement opportunities.
<b>Job Experience No. 2</b>	Systems Analyst at a technology firm
Main Responsibilities/Duties	involved in software development and testing.
Reason for Leaving	Contract ended.
<b>Job Experience NO. 3</b>	
Main Responsibilities/Duties	
Reason for Leaving	
<b>Job Experience No. 4</b>	
Main Responsibilities/Duties	
Reason for Leaving	
<b>Job Experience No. 5</b>	
Main Responsibilities/Duties	
Reason for Leaving	

- Structured questions

Dimension	Planned Question	Notes on Response
Adaptability	Can you provide an example of a time when you had to adapt to a sudden change in project requirements?	Candidate demonstrated flexibility in handling unexpected situations.
<b>Dimension Rating</b>		4/5

<b>Dimension</b>	<b>Planned Question</b>	<b>Notes on Response</b>
Analysis, problem-solving	How do you approach solving complex problems in your previous roles?	Candidate showcased strong analytical skills and strategic thinking.
<b>Dimension Rating</b>		5/5

<b>Dimension</b>	<b>Planned Question</b>	<b>Notes on Response</b>
Analysis, problem-solving		
<b>Dimension Rating</b>		

<b>Dimension</b>	<b>Planned Question</b>	<b>Notes on Response</b>
Initiative	Describe a situation where you took the initiative to improve a process or task.	Candidate showed proactive attitude towards process improvement.
<b>Dimension Rating</b>		4/5

<b>Dimension</b>	<b>Planned Question</b>	<b>Notes on Response</b>
Attention to Details	How do you ensure accuracy and precision in your work?	Candidate emphasized the importance of attention to detail in delivering quality results.
<b>Dimension Rating</b>		4/5

<b>Dimension</b>	<b>Planned Question</b>	<b>Notes on Response</b>
Innovation	Can you share an example of a time when you introduced a new idea or solution in your previous role?	Candidate demonstrated creativity and innovation in problem-solving.
<b>Dimension Rating</b>		5/5

Dimension	Planned Question	Notes on Response
Energy	How do you maintain high energy levels in a challenging work environment?	Candidate expressed enthusiasm and passion for their work.
<b>Dimension Rating</b>		4/5

Dimension	Planned Question	Notes on Response
Planning and organising	Describe your approach to prioritizing tasks and managing deadlines.	Candidate highlighted strong organizational skills and ability to manage multiple tasks efficiently.
<b>Dimension Rating</b>		5/5

Dimension	Planned Question	Notes on Response
Teamwork	Can you provide an example of a successful team project you were involved in?	Candidate demonstrated effective collaboration and communication skills in team environments.
<b>Dimension Rating</b>		4/5

Dimension	Planned Question	Notes on Response
Coaching	Have you had experience in mentoring or coaching junior team members?	Candidate shared experiences of providing guidance and support to colleagues.
<b>Dimension Rating</b>		4/5

- Expected Remuneration

Ask and Take Note of Remuneration Requirements	Annual Salary Expectation: R80,000 to R90,000
	Benefits: Medical insurance, annual leave, and performance-based bonuses

▪ Information regarding position and organisation

	✓
Give overview of the unit (nature, size, product)	✓
Describe organisational/departmental structure	✓
Discuss position (main activities/tasks)	✓
Outline promotional and developmental possibilities	✓
Realistic picture of working conditions, demands and standards	✓

▪ Opportunity for applicant to ask questions:

NOTES

Provided and addressed any queries or concerns from the applicant.

▪ Reference check

Obtained permission to check references

YES

NO

Confirm details of references:

	NAME	COMPANY	DESIGNATION	TEL.
1		Tech Solutions Inc.	Senior Manager	0122458723
2		DataTech Solutions.	IT Director	0245686245
3				

▪ Closing

	✓
Check to ensure whether applicant is satisfied with the questions asked, and the way the interview was handled	✓
Tell the applicant how the best applicant will be selected	✓
Tell the applicant when the applicants will be informed of the decision	✓
Tell the applicant what the next step in the procedure will be	✓
Thank the applicant for attending the interview	✓

▪ Appearance and Presentation

		✓		✓		
<b>Dress</b>	Formal	✓	Semi-formal		Casual	✓
<b>Body Posture</b>	Relaxed	✓	Tense		Fidgety	
<b>Communication</b>	Concise	✓	Vague		Long-winded	
<b>Voice Tone</b>	Clear	✓	High		Low	
<b>Voice Tempo</b>	Even	✓	Fast		Slow	

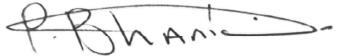
**NOTES**

Themba Zwane: Engaged and enthusiastic.

Communication: Clear and concise. Professionalism: Maintained a professional demeanor.

Leadership: Demonstrated potential. Technical Competence: Strong understanding.

- Signature of Interviewer(s)



DATE January 17, 2024.

# Performance Development Plan Format

**Employee Name:** John Sanns

**Position:** System Analyst

**Department:** Internal Systems

**Reason for Evaluation:** Quarterly/Other? Quarterly ✓

**Job Description:** The First Line Manager oversees the programming team's operations, ensuring productivity, compliance, and collaboration for organizational success.

## Performance Goals:

List the employee's most important work performance goals for the period.

Specific Duty	Goal	Tools Needed for Goal	Completion Date
Increase team productivity	Implement new project management software	Project management software, training sessions	12/02/2024 ✓
Improve conflict resolution skills	Attend conflict resolution workshop	Workshop registration, participation	12/02/2024
Enhance communication within the team	Implement weekly team meetings	Meeting agenda, communication platform	12/02/2024 ✓
Strengthen collaboration with other departments	Schedule monthly cross-departmental meetings	Meeting agenda, collaboration tools	14/02/2024
Ensure compliance with company policies	Review and update team policies	Policy documents, HR guidance	16/02/2024 ✓

**Additional Tools or Training Needed:** Provide advanced leadership training, project management workshops, and communication skills training to enhance coaching, conflict resolution, streamline workflow processes.

**Discussion and Measurement:** Regular bi-weekly performance discussions will monitor progress.

## Personal and Professional Developmental Goals:

List the employee's most important personal and professional developmental goals for the period.

Specific Duty	Type of Training Required	Why this training?	Objective and desired outcomes to be achieved.	Completion Date
Improve Time Management	Time Management Workshop	To enhance productivity and efficiency in managing tasks.	Better prioritize tasks and meet deadlines effectively.	20/02/2024
Enhance Leadership	Leadership Training	To develop leadership skills for effective team management.	Improve team motivation, communication, and decision-making.	22/02/2024
Improve Presentation	Presentation Skills Course	To enhance communication skills and confidence in presentations.	Deliver clear, engaging presentations with impact.	28/02/2024

**Additional Tools or Training Needed:** Provide advanced leadership training, project management workshops, and communication skills training to enhance coaching, conflict resolution, streamline workflow processes, and improve team collaboration and engagement.

**Discussion and Measurement:** Regular bi-weekly performance discussions will monitor progress towards goals using key indicators and feedback to assess effectiveness and identify improvements.

**Employee Comments:** None

## Employee Suggestions for Supervisor or Departmental Development:

I John Sanns \_\_\_\_\_ accept and approve this plan which serves as a binding agreement of Learning that needs to take place and is in line with the organisations Talent Management, People Development Objectives, and commitment to lifelong learning. The plan is in accordance with Legal Frameworks and an official process of the organisation's internal skills development processes.

Approved Talent Manager:

Date: 16/02/2024

**Date for Next Development Meeting:** 20/02/2024

Employee's Signature: JSanns

Date: 12/02/2024

Supervisor's Signature: CJones

Date: 12/02/2024

Talent Manager Signature: TMulaudzi

Date: 12/02/2024

# PERFORMANCE REVIEW EVALUATION CHECKLIST

Criteria	Achieved	
	Yes	No
1. The learner is advised of intended learning outcomes, the sequence of activities, job applicability, and the assessment process, where applicable. Opportunities are provided for the learner to contribute to and enquire about the process.	✓	
2. Coaching sessions enable the learner to understand the broader context and importance of the task. The sessions contribute towards the principle of life-long learning within a positive learning environment.	✓	✓
3. Coaching is outcomes-directed and includes appropriate and effective explanations, demonstrations, practice and review as required to enable learning to take place. The learner is directed towards helpful resources as required to promote understanding and learning transfer.	✓	
4. Language medium and level is appropriate to the learner and demands of the task and is consistent with industry usage.	✓	
5. The demonstrated steps and explanation sequence meets learner needs in terms of pace and logic of structure.	✓	
6. Opportunities for practice are sufficient to ensure learner competence is achieved in terms of the defined outcomes.	✓	✓
7. Coaching is carried out in accordance with specified requirements (Requirements include resource usage, health and safety requirements and organisational quality assurance requirements).	✓	
8. The coaching approach provides opportunities to monitor learner's progress and understanding of the task. Where necessary, modifications are made to the training approach to ensure the learner's needs are addressed.	✓	

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# Recruitment and Selection Action Plan

Phase	Action	By When	By Whom	Notes
Preparation	Create recruitment pack	2024-01-03	Philasande Bhani (Executive Manager)	
	Create advert	2024-01-03	Philasande Bhani (Executive Manager)	
	Create induction pack	2024-01-03	Philasande Bhani (Executive Manager)	
	Create and Agree on Budget	2024-01-04	Philasande Bhani (Executive Manager) and Mosima Le (HR Manager)	Budget to be approved by Mosima Le.
Advertising	Load Ad on Selected Platforms	2024-01-05	Philasande Bhani (Executive Manager)	
	Post Ad with Selected Agencies	2024-01-06	Philasande Bhani (Executive Manager)	
	Create posters/flyers (if appropriate)	2024-01-07	Philasande Bhani (Executive Manager)	
	Write press release or advert (if relevant)	2024-01-08	Mosima Leshika (HR Manager)	
Plan	Plan distribution of materials	2024-01-09	Philasande Bhani (Executive Manager)	
	Plan social media posts	2024-01-10	Philasande Bhani (Executive Manager)	
	Plan distribution on websites (if appropriate)	2024-01-11	Philasande Bhani (Executive Manager)	
	Plan work with partners or stakeholders	2024-01-12	Philasande Bhani (Executive Manager)	
Recruitment	Send out recruitment packs	2024-01-13	Philasande Bhani (Executive Manager)	
	Arrange interviews	2024-01-14	Philasande Bhani (Executive Manager)	
	Arrange emails to be sent	2024-01-15	Philasande Bhani (Executive Manager)	
T.N. _____				

## Recruitment and Selection Action Plan

	Check candidate is eligible	
	Board or General Meeting to elect or co-opt	
Induction	Arrange initial meeting with Chair or trustee	
	Send induction pack	✓
	Arrange external training (if appropriate)	
Other		

## Recruitment Plan

Company Name:	African Resonance	
Date:	15 January 2024	
Prepared by:	Philasande Bhani	
Position to Be Filled	First Line Manager	
Intention of Hiring	Advertisement, Referrals	
Target Group	Candidates with supervisory experience in software development	
Method/How will we attract the applicants? Listing mediums	<ul style="list-style-type: none"> <li>- Advertisement on job portals and company website.</li> <li>- Referrals from current employees.</li> <li>- Online job portals</li> <li>- Company website</li> <li>- Internal referral program</li> </ul>	
Selection Procedure	<ol style="list-style-type: none"> <li>1. Initial screening of applications</li> <li>2. In-person interview</li> <li>3. Professional references check</li> <li>4. Job assessment</li> <li>5. Evaluation of work experience and education</li> </ol>	
Evaluation of Applications	<b>Suggested Evaluation Weights</b> <ul style="list-style-type: none"> <li>a. In-person interview (20%)</li> <li>b. Professional references (10%)</li> <li>c. Job assessment (20%)</li> <li>d. Work experience (30%)</li> <li>e. Education (20%)</li> </ul>	<b>Description of how evaluation will be done</b> <ul style="list-style-type: none"> <li>- In-person interview: Assessing candidate's communication skills, leadership abilities, and fit for the role.</li> <li>- Professional references: Verifying candidate's past performance and behavior in previous roles.</li> <li>- Job assessment: Evaluating candidate's problem-solving skills and technical proficiency through a practical task or case study.</li> <li>- Work experience: Considering the relevance and depth of candidate's prior experience in similar roles.</li> <li>- Education: Assessing candidate's academic qualifications and relevance to the position.</li> </ul>

## Training Needs Analysis Report

### Introduction

This report presents the findings of a comprehensive Training Needs Analysis (TNA) conducted for the SystemDevs Team within AR. The purpose of this analysis is to identify the skill and competency gaps within the team and develop targeted training interventions to address these gaps effectively.

### Analysis

The analysis reveals significant variances between the expected and observed skill levels within the team. While some areas, such as Communication and Leading, show that most team members meet or exceed expectations, there are notable deficiencies in skills related to Developing Teams, Change Management, Self-Development, and Thinking. These areas require attention to ensure the team's overall effectiveness and performance alignment with organizational objectives.

### Recommendations

Based on the identified gaps, the following recommendations are proposed:

1. Develop a training program focused on Developing Teams and Change Management to enhance team collaboration and adaptability to organizational changes.
2. Implement self-development workshops to empower team members to take ownership of their professional growth and development.
3. Provide critical thinking and problem-solving training to improve decision-making skills and strategic thinking within the team.

### Conclusion

In conclusion, the Training Needs Analysis underscores the importance of addressing skill gaps within the team to optimize performance and contribute to organizational success. By implementing targeted training interventions, the team can enhance its overall effectiveness and align its capabilities with the organization's strategic objectives.

This concludes the Training Needs Analysis report for the SystemDevs Team.

Philasande Bhani

Software Developer

AR

P

T.N.