

SAQA ID 59201

NATIONAL CERTIFICATE: GENERIC MANAGEMENT

CLUSTER 8

Accredited
course
information:

Unit Standard ID	NQF Level	Credits
252032	5	8
Develop, implement and evaluate an operational plan		

Accredited
course
information:

Unit Standard ID	NQF Level	Credits
252025	5	8
Monitor, assess and manage risk		

Accredited
course
information:

Unit Standard ID	NQF Level	Credits
252022	5	8
Develop, implement and evaluate a project plan		

LEARNER LOGBOOK





Important Information

Please ensure that this logbook is kept in a safe place. It is one of the legal records of your program participation, and without this, you cannot receive credit for what you achieve

This logbook belongs to:	Philasande Bhani
Contact telephone number:	07821412165
My employer:	Dashpay
My training provider:	Training Force
Date received:	2024/03/03
Date returned:	2024/03/04

Instructions to Learner

The completion and submission of this Logbook is essential for the Learners achievement of the qualification.

The following need to be noted before using this logbook:

1. The responsibility for the completion of the logbook lies with the Learner
2. Entries in the logbook must be clear, concise and in reasonable detail and where additional evidence is required please ensure that it is attached.
3. Learners are reminded that this logbook constitutes valuable record of work experience
4. If workplace experience cannot be attained for Exit Level Outcome, then a simulated working environment can be arranged in order to assess the abilities of the Learner
5. When in doubt, contact your assessor/mentor

Instruction to Mentor/Supervisor

Interpretation of the method used to assess learner's understanding

Key to Methods	Obs	Observation	Q	Questioning	PE	Product Evaluation
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This logbook must be completed by the **Appointed Mentor** to you as the Learner. Ensure to make an appointment with your Mentor before submitting your POE for assessment.

INSTRUCTION TO MENTOR:

As an appointed Mentor to the learner, you play an important role in the development of a learner and should ensure that you check understanding of the relevant demonstratable outcomes. Carefully read what the learner needs to demonstrate, asks questions around the topic and guide the learner on what evidence would be relevant to include in the portfolio, this evidence can include actual workplace tasks that are being performed and or where performed. Furthermore, ensure to give the learner positive, constructive feedback on workplace tasks related to the outcomes as set out below.

i.e if a learner was part of and or experienced a conflict situation, make comments on the how the learner handled the situation, what they could've done better etc. in the evidence cell and if necessary, at the comment section below.

If the outcome requires the learner to be part of a meeting, give the learner opportunity to do so, and give the feedback on what they did correctly and what they could do to improve.

The table also indicates activities that the learner needed to complete during the process in the Portfolio of evidence and after the process, check the activity and provide guidance and or praise where applicable.

Use the grading provided to give feedback to the learner on how they performed on the activities below:

Grading scale

Unsatisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Satisfactory <input checked="" type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
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The grading scale has been included at the beginning of each outcome of the applicable Unit Standards.

Once you have graded the learner, provide feedback on the reason for the grading at the end of the Learning Unit Log.



WORKPLACE LOGBOOK

ID 252032 - Develop, implement and evaluate an operational plan

<i>U. std</i>	<i>SO / AC (Reference)</i>	<i>Specific Outcomes and Assessment Criteria</i>	<i>Learner should be able to demonstrate/show understanding of the following</i>	<i>POE Activity COMPLETED</i>	<i>Method Used to assess understanding</i>
SO1: Develop operational strategies for a unit.					
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>		Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>
				Exceed Satisfactory <input type="checkbox"/>	
252032	1.1	The strategic plan of an entity is examined to determine the purpose of a unit in contributing to the achievement of the entity's strategy.	Learners you need be able examine the strategic plan of an entity to determine the purpose of a unit You must be able to develop and record operational strategies for achieving the purpose of a unit.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none"> Learner examined the strategic plan of an entity to determine the purpose of a unit Learner developed and record operational strategies for achieving the purpose of a unit. Learner ensured that the operational strategy of a unit is aligned with overall strategy of an entity. Learner followed a systematic process to develop goals, objectives and performance standards that are clear, concise, measurable and achievable. Learner ensured that stakeholders are involved in the formulation of the goals, objectives and performance standards of a unit to obtain their commitment.
252032	1.2	Operational strategies for achieving the purpose of a unit are developed and recorded.	You need to make sure that the operational strategy of a unit is aligned with overall strategy of an entity. You need to be able to follow a systematic process to develop goals, objectives and performance standards that are clear, concise, measurable and achievable.	Summative 2	
252032	1.3	The operational strategy of a unit is aligned with the overall strategy of an entity.		Summative 2	
252032	1.4	A systematic process is followed to develop goals, objectives and performance standards that are clear, concise, measurable and achievable.	Make sure that stakeholders are involved in the formulation of the goals, objectives and performance standards of a unit to obtain their commitment.	Summative 2	
252032	1.5	Stakeholders are involved in the formulation of the goals, objectives		Summative 2	

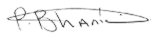


U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	POE Activity COMPLETED	Method Used to assess understanding
		and performance standards of a unit to obtain their commitment.			
SO2: Develop an operation plan for a unit.					
Unsatisfactory ☐		Needs Improvement ☐	Satisfactory ☐	Excellent ☐	Exceed Satisfactory ☐
252032	2.1	The operation plan is developed to transform the goals and objectives into tasks, responsibilities, time frames, performance measures, resource needs and contingencies.	Learner you should be able to develop the operational plan to transform the goals and objectives into task, responsibilities, time frames, performance measures, resource needs and contingencies. You need to be able to validate measurable parameters against customer and unit performance requirements. You need to be able to obtain feedback on the operational plan from each team members to promote buy-in in the implementation of the plan.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner developed the operational plan to transform the goals and objectives into task, responsibilities, time frames, performance measures, resource needs and contingencies.Learner validated measurable parameters against customer and unit performance requirements.Learner obtained feedback on the operational plan from each team members to promote buy-in in the implementation of the plan.
252032	2.2	Measurable parameters are validated against customer and unit performance requirements.		Summative 2	
252032	2.3	Monitoring systems are described in the operational plan to enable the measurement of progress and results against the performance standards.		Summative 2	
252032	2.4	Feedback on the operational plan is obtained from team members to promote buy-in in the implementation of the plan.		Summative 2	
SO3: Implement an operational plan.					
Unsatisfactory ☐		Needs Improvement ☐	Satisfactory ☐	Excellent ☐	Exceed Satisfactory ☐
252032	3.1	Contingency plans are developed and documented in accordance with the entity's policies and procedures.	Learner you need be able to develop and the contingency plans and	Summative 2	Mentor to observe learner's conducting the following activities:



U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	POE Activity COMPLETED	Method Used to assess understanding
252032	3.2	Contingency plans are communicated to relevant stakeholders in accordance with the entity's risk management procedures.	communicate it to relevant stakeholders. You must be able to distribute and store contingency plans.	Summative 2	<ul style="list-style-type: none">Learner developed and the contingency plans and communicate it to relevant stakeholders.Learner distributed and stored contingency plans.
252032	3.3	Contingency plans are distributed and stored in accordance with the entity's risk management procedures.		Summative 2	
SO4: Monitor, measure and evaluate the achievement of goals and objectives.					
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252032	4.1	The performance of the unit is monitored against the goals, objectives and performance standards in the plan using established monitoring systems.	Learner you need be able to monitor the performance of the unit against the goals, objectives and performance standards in the plan. You should be able to conduct performance review to measure inputs and outputs of team members. You should be able to implement the recommendation on corrective action with the agreement of the responsible first line managers. You must evaluate the results in terms of the teams' contributions to the performance of a unit.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner monitored the performance of the unit against the goals, objectives and performance standards in the plan.Learner conducted performance review to measure inputs and outputs of team members.Learner implemented the recommendation on corrective action with the agreement of the responsible first line managers.Learner evaluated the results in terms of the teams' contributions to the performance of a unit.
252032	4.2	Performance reviews are conducted to measure inputs and outputs of team members against the operational plan.		Summative 2	
252032	4.3	Recommendations on corrective action are implemented with the agreement of the responsible first line managers.		Summative 2	
252032	4.4	Results are evaluated in terms of the teams' contribution to the performance of a unit.		Summative 2	



Coach / Mentor Comment This section is compulsory, and must include positive, constructive feedback to the learner in the subject matter area being addressed.	Coach /Mentor Signature	Learner Signature	Assessor Signature	Moderator Signature
	<i>caron elferink</i>			

ID 252025 - Monitor, assess and manage risk

U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding
SO1: Demonstrate an understanding of potential risks to a unit.					
Unsatisfactory □		Needs Improvement □	Satisfactory □	Excellent □	Exceed Satisfactory □
252025	1.1	The concept of risk is explained with reference to accepted theory and practice.	Learner you must be able to demonstrate an understanding of potential risks to a unit.	Formative Topic 5 Summative 1	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner demonstrated understanding of potential risks to a unit.Learner identified the factors that could constitute risks to a unit.Learner was able to show understanding of the role of organisational policies and procedures.
252025	1.2	The factors that could constitute risks to a unit are identified and explained.	You need to be able to identify the factors that could constitute risks to a unit.	Summative 2	
252025	1.3	The role of organisational policies and procedures are explained in relation to risk management.	You need to show understanding of the role of organisational policies and procedures.	Formative Topic 5 Summative 1	
SO2: Identify potential risks and assess the impact thereof in a unit.					
Unsatisfactory □		Needs Improvement □	Satisfactory □	Excellent □	Exceed Satisfactory □
252025	2.1	Potential risk factors for critical processes in a unit are identified and documented.	Learner you must be able to identify and document potential risk factors for critical processes in a unit.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner identified possible scenarios that could constitute a risk.Learner identify possible scenarios that could constitute a risk.Learner evaluated and recorded the possibility of each scenario.Learner performed and documented an analysis to rate
252025	2.2	Possible scenarios that could constitute a risk are identified and documented.	You need to be able to identify possible scenarios that could constitute a risk. You need to evaluate and record the possibility of each scenario.	Summative 2	
252025	2.3	The possibility of each scenario occurring is evaluated and recorded for future use.	You need to be able to perform and document an analysis to rate the impact of each scenario on a unit.	Summative 2	
252025	2.4	An analysis is performed and documented to rate the impact of each scenario on a unit.	You need to determine and document the priorities resulting from the impact	Summative 2	



U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding
252025	2.5	Priorities resulting from the impact analysis are determined and documented for implementation in the event of the risk materialising.	analysis for implementation in the event of the risk materialising	Summative 2	the impact of each scenario on a unit. <ul style="list-style-type: none">Learner determine and document the priorities resulting from the impact analysis for implementation in the event of the risk materialising.
SO3: Develop contingency plans for managing risk.					
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252025	3.1	Contingency plans are developed and documented in accordance with the entity's policies and procedures.	Learner you need be able to develop and the contingency plans and communicate it to relevant stakeholders. You must be able to distribute and store contingency plans.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner developed and the contingency plans and communicate it to relevant stakeholders.Learner distributed and stored contingency plans.
252025	3.2	Contingency plans are communicated to relevant stakeholders in accordance with the entity's risk management procedures.		Summative 2	
252025	3.3	Contingency plans are distributed and stored in accordance with the entity's risk management procedures.		Summative 2	
SO4: Test and revise contingency plans.					
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252025	4.1	Contingency plans are tested in accordance with the entity's risk management procedures.	Learner you need to be able to test the contingency plans you have developed. You need to be able to document the recommendations on improvements to	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner test the contingency plans you have developed.
252025	4.2	Recommendations on improvements to the contingency plans are		Summative 2	



U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding
		documented in relation to the findings of the testing.	the contingency plans in relation to the findings of the testing.		<ul style="list-style-type: none"> Learner document the recommendations on improvements to the contingency plans in relation to the findings of the testing. Learner to revise the contingency plan to incorporate testing.
252025	4.3	Contingency plans are revised to incorporate recommendations from the testing in accordance with the entity's policies and procedures.	You need to be able to revise the contingency plan to incorporate testing.	Summative 2	

Coach / Mentor Comment This section is compulsory, and must include positive, constructive feedback to the learner in the subject matter area being addressed.	Coach /Mentor Signature	Learner Signature	Assessor Signature	Moderator Signature
	caron elferink	P. Bhanu		



ID 252022 - Develop, implement and evaluate a project plan

202021 Develop, implement and evaluate a project plan						
U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding	
SO1: Demonstrate an understanding of the potential risks to a unit.						
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>		Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252022	1.1	Project alternatives are considered in relation to their viability in achieving unit objectives.	Learner you must be able to show understanding of the nature of change and its impact on organisational sustainability. You need to motivate the need for change by identifying the benefits of change for a unit.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner was able to show understanding of the nature of change and its impact on organisational sustainability.Learner to motivate the need for change by identifying the benefits of change for a unit.	
252022	1.2	The decision on the preferred alternative is motivated in terms of viability, cost and results.		Summative 2		
SO2: Scope a work-based project for a unit.						
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>		Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252022	2.1	The scope of work and deliverables are defined in relation to the unit objectives.	Learner you must be able to show understanding of the scope of work and deliverables in relation to the unit objectives for your project.	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none">Learner was able to show understanding of the scope of work and deliverables in relation to the unit objectives for your project.Learner determined the principal work activities that will be required to achieve the unit objectives for your project.Learner identified and analyse the potential risks in relation to the	
252022	2.2	The principal work activities are determined that will be required to achieve the unit objectives.		Summative 2		
252022	2.3	The potential risks are identified and analysed in relation to the likelihood of risks materialising.	You need to be able to determine the principal work activities that will be required to achieve the unit objectives for your project. You need to be able to identify and analyse the potential risks in relation to the likelihood of risks materialising for your project.	Summative 2		
252022	2.4	Change processes that are essential to project success are described in terms of their contribution to the project results.		Summative 2		



P. Bharti

U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding
			You need to show understanding of change processes that are essential to your project's success in terms of their contribution to the project results		likelihood of risks materialising for your project. <ul style="list-style-type: none"> Learner was able to show understanding of change processes that are essential to your project's success in terms of their contribution to the project results.
SO3: Develop a project plan.					
Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252022	3.1	The overall objectives of the plan are described with reference to the achievement of unit objectives.	Learner you need to be able to demonstrate your understanding of the overall objectives of the plan with reference to the achievement of your unit objectives. You should be able to show understanding of the sponsor, project team and other stakeholders with their contributions to your project. Develop a work breakdown structure (WBS) to describe the main activities of your project and the interrelationship between them. You need to stipulate the project activities, responsibilities, time frames, performance measures, resource needs and quality criteria	Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none"> Learner demonstrated your understanding of the overall objectives of the plan with reference to the achievement of your unit objectives. Learner was able to show understanding of the sponsor, project team and other stakeholders with their contributions to your project. Learner Develop a work breakdown structure (WBS) to describe the main activities of your project and the interrelationship between them. Learners stipulate the project activities, responsibilities, time frames, performance measures, resource needs and quality criteria
252022	3.2	The sponsor, project team and other stakeholders are described with their contributions to the project.		Summative 2	
252022	3.3	A work breakdown structure (WBS) is developed to describe the main activities of the project and the interrelationship between them.		Summative 2	
252022	3.4	The project activities required performance levels and quality criteria are stipulated and communicated to team members and other stakeholders to promote quality and effectiveness.		Summative 2	
252022	3.5	The project plan is checked for accuracy, completeness and compliance with internal and external requirements.		Summative 2	



<i>U. std</i>	<i>SO / AC (Reference)</i>	<i>Specific Outcomes and Assessment Criteria</i>	<i>Learner should be able to demonstrate/show understanding of the following</i>	<i>Activity to be Completed by Learner in the POE</i>	<i>Method Used to assess understanding</i>
			and communicate them to team members and other stakeholders to promote quality and effectiveness Check the project plan for accuracy, completeness and compliance to internal and external requirements.		and communicate them to team members and other stakeholders to promote quality and effectiveness. <ul style="list-style-type: none"> Learner check the project plan for accuracy, completeness and compliance to internal and external requirements.

SO4: Develop tools to measure key performance parameters.

Unsatisfactory <input type="checkbox"/>		Needs Improvement <input type="checkbox"/>		Satisfactory <input type="checkbox"/>	Excellent <input type="checkbox"/>	Exceed Satisfactory <input type="checkbox"/>
252022	4.1	A GANTT chart is developed for managing and evaluating the time dimension.	Learner you need to be able to develop and submit a Gantt chart for managing and evaluating the time dimension You need to develop and submit a budget for managing and evaluating the cost dimension You need to develop and submit quality parameters for managing and evaluating quality You need to ensure that the you communicate the measurement tools to team members to promote a common understanding of requirements and to promote buy-in to the implementation of the plan.		Summative 2	Mentor to observe learner's conducting the following activities: <ul style="list-style-type: none"> Learner developed and submit a Gantt chart for managing and evaluating the time dimension Learner developed and submit a budget for managing and evaluating the cost dimension Learner developed and submit quality parameters for managing and evaluating quality Learner communicated the measurement tools to team members to promote a common understanding of requirements and to promote buy-in to the implementation of the plan.
252022	4.2	A budget is developed for managing and evaluating the cost dimension.			Summative 2	
252022	4.3	Quality parameters are developed for managing and evaluating quality.			Summative 2	
252022	4.4	The measurement tools are communicated to team members to promote a common understanding of requirements.			Summative 2	



U. std	SO / AC (Reference)	Specific Outcomes and Assessment Criteria	Learner should be able to demonstrate/show understanding of the following	Activity to be Completed by Learner in the POE	Method Used to assess understanding	
SO5: Implement the plan and evaluate project progress.						
Unsatisfactory ☐		Needs Improvement ☐		Satisfactory ☐	Excellent ☐	Exceed Satisfactory ☐
252022	5.1	Project implementation is monitored and evaluated against the plan, the stipulated performance criteria and quality requirements.	Learner you need to be able to monitor the project implementation and evaluate it against the plan, the stipulated performance criteria and quality requirements. You need to monitor the project results to establish progress and effectiveness. You need to identify and analyse the deviations from the project plan in order to take corrective action. You need to implement corrective actions to ensure the achievement of project objectives. You need to evaluate results against the scope and objectives of the project.	Summative 2	Mentor to observe learner’s conducting the following activities: <ul style="list-style-type: none">Learner monitored the project implementation and evaluated it against the plan, the stipulated performance criteria and quality requirementsLearner monitor the project results to establish progress and effectiveness.Learner identified and analyse the deviations from the project plan in order to take corrective action.Learner implemented corrective actions to ensure the achievement of project objectives.Learner evaluated results against the scope and objectives of the project.	
252022	5.2	Project results are monitored to establish progress and effectiveness.		Summative 2		
252022	5.3	Deviations from the project plan are identified and analysed in order to take corrective action.		Summative 2		
252022	5.4	Corrective actions are implemented to ensure the achievement of project objectives.		Summative 2		
252022	5.5	Results are evaluated against the scope and objectives of the project.		Summative 2		



<i>Coach / Mentor Comment</i> This section is compulsory, and must include positive, constructive feedback to the learner in the subject matter area being addressed.	Coach /Mentor Signature	Learner Signature	Assessor Signature	Moderator Signature
	caron elferink	P. Bhanu		



FEEDBACK REPORT

Instruction to Mentor: Complete the workplace performance report below as an overall outcome to all the above activities. Rate the learner based on the interactions. A true and honest reflection is important to ensure the learner is not mis-guided and or mis-represented.

WORKPLACE Performance scale FEEDBACK ON LEARNER

Scale			
1= Below Expectations			
2= Meets Expectations			
3= Exceed Expectations			
Behavioural Attributes	1	2	3
Quality and quantity of work:			x
Punctuality:			x
Communication skills:			x
Interrelationship with staff members:			x
Problem solving:			x
Overall Comments by Supervisor/Mentor:			
Good			
Mentor/Supervisor's Signature:		Date: 2024/03/04	
caron elferink			

GENERAL COMMENTS FROM LEARNERS

Instructions to learner: Complete the following section to reflect your daily duties and or major tasks and activities that you complete daily/monthly. Make special reference to communication tasks, how you communicate and what methods are generally used in your workplace.

[illegible]