

SAQA ID 59201

NATIONAL CERTIFICATE: GENERIC MANAGEMENT CLUSTER 2

Accredited
course
information:

Unit Standard ID

NQF Level

Credits

12433

5

8

Use communication techniques effectively

Accredited
course
information:

Unit Standard ID

NQF Level

Credits

252027

5

6

Devise and apply strategies to establish and maintain workplace relationships

Accredited
course
information:

Unit Standard ID

NQF Level

Credits

252031

5

4

Apply the principles and concepts of emotional intelligence to the management of self and others

LEARNER POE



TABLE OF CONTENTS

Pre-assessment meeting checklist.....	3
Assessment plan	4
Formative assessment	9
Assessment activities	10
Learner evaluation of the assessment process.....	20
Development plan.....	21

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.

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

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.

Date of Assessment								
Assessor Declaration	The assessor hereby 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				Assessor signature				
Moderator Name				Moderator Signature				
Learner Name				Learner Signature				
Mentor/ Facilitator Name				Mentor/ Facilitator Signature				
Key to Methods	Obs	Observation	Q	Questioning	PE	Product Evaluation	LB	Logbook

ID 12433 - Use communication techniques effectively

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
SO1: Discuss and explain a range of written and oral communication techniques used in the workplace								
1.1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.	Formative Topic 1 Summative 1,2,3	Knowledge	Q				
1.2	Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.	Formative Topic 9 Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
1.3	A variety of generated workplace reports and presentations are available for scrutiny.	Formative Topic 5 Summative 2	Practical Demonstration	Product Evaluation				
1.4	Presentations are effectively delivered and meet the needs of the target audience	Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
SO2: Lead discussions and chair meetings								
2.1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.	Formative Topic 1 Summative 2	Practical Demonstration	Product Evaluation				
2.2	Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.	Formative Topic 9 Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
2.3	A variety of generated workplace reports and presentations are available for scrutiny.	Formative Topic 5 Summative 2	Practical Demonstration	Product Evaluation				
2.4	Presentations are effectively delivered and meet the needs of the target audience	Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
SO3: Generate a variety of workplace reports using various data gathering techniques								
3.1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.	Formative Topic 1 Summative 2	Practical Demonstration	Product Evaluation				
3.2	Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.	Formative Topic 9 Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
3.3	A variety of generated workplace reports and presentations are available for scrutiny.	Formative Topic 5 Summative 2	Practical Demonstration	Product Evaluation				
3.4	Presentations are effectively delivered and meet the needs of the target audience	Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
SO4: Deliver presentations								
4.1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.	Formative Topic 1 Summative 2	Practical Demonstration	Product Evaluation				
4.2	Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.	Formative Topic 9 Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
4.3	A variety of generated workplace reports and presentations are available for scrutiny.	Formative Topic 5 Summative 2	Practical Demonstration	Product Evaluation				
4.4	Presentations are effectively delivered and meet the needs of the target audience	Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				

ID 252027 - Devise and apply strategies to establish and maintain workplace relationships

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
SO1: Liaise and network with internal and external stakeholders.								
1.1	Opportunities for networking are identified or created with internal and external	Formative Topic 11 Summative 2	Practical Demonstration	Product Evaluation				

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
	stakeholders relevant to a unit.							
1.2	Networking opportunities are identified, meetings are attended and new contacts established for mutual benefit.	Formative Topic 11 Summative 2 Logbook	Practical Demonstration	Product Evaluation Observation				
1.3	Avenues for communicating with stakeholders are explored and appropriate strategies implemented to the mutual benefit of all people involved.	Formative Topic 11 Summative 2	Practical Demonstration	Product Evaluation				
SO2: Devise and apply a strategy to establish constructive relationships with the manager(s).								
2.1	Managers are kept informed of activities, progress and results of the unit through verbal or written feedback in accordance with the entity's policies and procedures.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
2.2	A process for seeking and exchanging information, and seeking advice are agreed to in consultation with all managers in a unit.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
2.3	Managers in the unit are consulted on issues that are relevant to their area of responsibility to promote constructive relationships and interaction between units in the entity.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
2.4	Concerns over the quality of work are raised directly with relevant managers in accordance with the entity's policies and procedures.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
2.5	Information presented to the managers is clear, accurate and timely.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
SO 3: Identify and minimise personal conflict in a unit.								
3.1	Information on the procedures for dealing with conflict in a unit is communicated to team members to promote the orderly resolution of the conflict in accordance with the entity's policies and procedures.	Formative Topic 14 Summative 2 Logbook	Practical Demonstration	Product Evaluation				
3.2	Actions taken to resolve potential and actual conflict are taken to deal promptly in accordance with the entity's policies and procedures.	Formative Topic 14 Summative 2 Logbook	Practical Demonstration	Product Evaluation				
3.3	Conflict situations are referred to appropriate managers where required in	Formative Topic 14 Summative 2	Practical Demonstration	Product Evaluation				

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
	terms of the entity's policies and procedures.	Logbook						
SO 4: Devise and apply a strategy to establish constructive relationships with team members in a unit								
4.1	The strategy is developed through a consultative process that involved all team members in the development of goals and objectives to obtain commitment and support.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
4.2	Opportunities for team members to discuss work-related and personal issues are identified and used when appropriate.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
4.3	Feedback and advice to team members are offered in a positive manner to contribute towards constructive relationships.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				
4.4	Team members are informed about developments and changes that may affect them.	Summative 2 Logbook	Practical Demonstration	Product Evaluation				

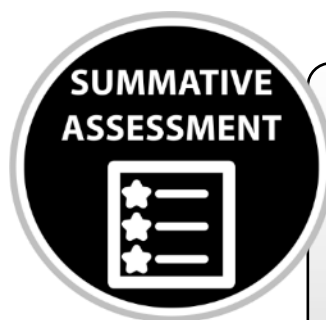
	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
SO1: Demonstrate knowledge and understanding of the principles and concepts of emotional intelligence in respect of life and work relations.								
1.1	The principles of emotional intelligence are explained with reference to examples from life and work situations.	Formative Topic 15,16 Summative 1	Knowledge	Q				
1.2	The concepts of emotional intelligence are described with reference to examples.	Formative Topic 15,16 Summative 1	Knowledge	Q				
SO2: Analyse the role of emotional intelligence in interpersonal and intrapersonal relationships in life and work situations.								
2.1	The importance of personal and interpersonal competencies is explained in relation to interactions in life and work situations.	Formative Topic 15,16 Summative 1	Knowledge	Q				
2.2	Techniques for giving and receiving feedback are analysed to identify practices reflecting emotional intelligence.	Formative Topic 15,16 Summative 2	Knowledge Practical Demonstration	Product Evaluation				
SO 3: Analyse the impact of emotional intelligence on life and work interactions.								
3.1	The positive and negative impact of emotional intelligence is motivated through examples on the intrapersonal and interpersonal level.	Formative Topic 15,16 Summative 1	Knowledge	Q				
3.2	The consequences of applying emotional intelligence are explained with reference to examples from life and work situations.	Formative Topic 15,16 Summative 1	Knowledge	Q				
SO4: Evaluate own level of emotional intelligence in order to determine development areas.								
4.1	Own responses to life and work situations are analysed in terms of the principles and concepts of emotional intelligence.	Formative Topic 15,16 Summative 3	Practical Demonstration	Product Evaluation				
4.2	Strengths and weaknesses are analysed with reference to the concepts and principles of emotional intelligence in order to identify development areas.	Formative Topic 15,16 Summative 2,3	Practical Demonstration	Product Evaluation				
4.3	Techniques for improving own emotional intelligence are described in relation to development areas identified.	Formative Topic 15,16 Summative 3	Practical Demonstration	Product Evaluation				

FORMATIVE ASSESSMENT



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.

#	Formative Assessment Activity	Tick to confirm completion
	Formative Assessment Activity 1	
	Formative Assessment Activity 2	
	Formative Assessment Activity 3	
	Formative Assessment Activity 4	
	Formative Assessment Activity 5	
	Formative Assessment Activity 6	
	Formative Assessment Activity 7	
	Formative Assessment Activity 8	
	Formative Assessment Activity 9	
	Formative Assessment Activity 10	
	Formative Assessment Activity 11	
	Formative Assessment Activity 12	
	Formative Assessment Activity 13	
	Formative Assessment Activity 14	
	Formative Assessment Activity 15	
	Formative Assessment Activity 16	
	Formative Assessment Activity 17	
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.

ASSESSMENT ACTIVITIES

	Summative Activity	Tick to confirm Completion
1.	Summative Assessment Activity 1	
2.	Summative Assessment Activity 2	
3.	Summative Assessment Activity 3	
Learner Signature:		
Assessor Signature:		
Moderator Signature:		

SUMMATIVE ASSESSMENT ACTIVITY 1: KNOWLEDGE ASSESSMENT



US 12433 SO 1 AC 1

US 252031 SO 1 AC 1, 2, SO 2 AC 1, SO 3 AC 1, 2

EEK 1, 2, 3, 4, 5, 6, 7

CCFO 7

Assessment Method: Questioning

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

1. What is the purpose of using various types of communication in an organisation? Explain and use examples make specific reference to the attributes, characteristics, and properties of each.
2. What oral communication technique/s would you use to communicate to a live audience? Explain all techniques relevant to both oral communication and presentation of information to enhance the talk.
3. According to the communication theory, what element is required to ensure mutual understanding? Explain why this is required.
4. Why are their strict procedures when holding meetings and leading discussions?
5. Why should you use effective data gathering techniques when compiling written reports?
6. What technique could you use to identify target audience of written or oral communication? Explain how the technique works.
7. Choose two (2) of each oral and written techniques – Explain each technique with specific reference to when the technique should be used and why in relation to the communication theory.
8. What are the implications of not developing written and oral communication according to the target audience requirements?
9. A relationship exists between oral and written communication techniques – Explain this relationship and how it would affect job-functioning when in a Leadership position.
10. Why is it important to pay attention to regulations and legislation in accordance with company policies and procedures when developing communication?
11. How do the principles of emotional intelligence affect our quality of life and work? Explain using examples.
12. What is the importance of intra and inter-personal relations during interactions in the workplace? Explain with reference to how it relates to the concepts and principles of individuals and teams.

13. Emotional intelligence impacts our daily lives, what is the impact of negative emotional intelligence in the workplace and how does this affect the quality of life?

Feedback to Learner:

VACS Assessment of Evidence	V	A	C	S
Result of First Assessment	C	NYC	Date	
Result of Second assessment	C	NYC	Date	
Result of Third Assessment	C	NYC	Date	
Learner Signature			Date	
Assessor Signature			Date	
Moderator Signature			Date	

SUMMATIVE ASSESSMENT ACTIVITY 2: PRACTICAL ACTIVITIES



US: 12433 SO 1 SO 2 SO 3 SO 4 (AC 2 – 4)

US: 252027 SO 1 - 4

US: 252031 SO 2 AC 2, SO 3 AC 1

CCFO: 12433 1 – 6; 252027 1 – 8; 252031 1 - 6

EEK: 12433 - 3,4,5,6,7; 252027 - 2,3,4; 252031 - 2,3,4

Assessment Method: Product Evaluation

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

Workplace Assignment

Remember: Document structures, written language and communication techniques are relevant. Ensure to provide professionally prepared documents in suitable formats to get your message across.

This is a workplace observation and findings assignment. You will need to take your time in planning and gathering the information and then producing the required documentation of your findings as evidence of your understanding.

1. In your immediate department, observe the communication taking place over a period of 2 weeks – then report on the following in a suitable report format:

- a. The communication methods being applied in the workplace.
- b. How does this relate to application of the communication theory?
- c. What can be done to improve the communication according to the theory?
- d. Are employee's engaging and interacting suitably?
- e. Are there misunderstandings during because of the current communication?
- f. Does conflict occur because of the current communications methods?

Instructions: The information should be logically structured in the report, findings and recommendations should be clear in a way that Management will understand the message. Recommendations should be in line with acceptable communication practices for oral and written communication.

Provide the following as evidence:

- a. A report in suitable report format ensuring that all elements required are present to clearly communicate the message using acceptable written communication techniques.

2. Using the written report from No. 1 Plan and Prepare a presentation for Management to inform them of your findings and recommendations to improve communication. Include in the presentation techniques that you used to gather and analyse the information.

- a. Plan and Prepare for a presentation using suitable presentation software.
- b. Arrange a meeting with your Manager/s.
- c. Present the presentation to them.
- d. Video the presentation.

The length of the presentation will be dependent on the amount of information required – you will need to analyse what the audience to determine the length.

Provide the following as evidence:

- a. The completed presentation.
- b. Notes on the discussion points.
- c. Video recording of the presentation.
- d. Completed evaluation form – in logbook.

3. Arrange a meeting with your team and or a couple of colleagues: The meeting needs to be held to discuss the levels of emotional intelligence in the workplace and how it affects performance.

- a. Draw up a suitable Agenda in accordance with the topic.
- b. Arrange the meeting in accordance with meeting requirements.
- c. Prepare all documentation.
- d. Conduct the meeting in accordance with meeting procedures.
- e. Minute the meeting.
- f. Distribute the minutes.

Provide the following as evidence:

- a. The Agenda for the meeting.
- b. Email notifications of the notice of meeting and invitations sent.
- c. Video recording of you conducting the meeting.
- d. The completed minutes of the meeting.
- e. Email confirmation of the distribution of the finalised minutes.
- f. A reflection report in which you reflect on your own performance during the meeting, i.e., what did you handle well, what could you improve on, what needs to change, etc.

4. You have recently noticed that your Network needs to improve, to enhance business dealings and leaderships skills. You want to find out what other Leaders are applying, how they address their teams and how this affects their team's performance.

- a. Identify opportunities for networking with internal and external stakeholders.
- b. Create an opportunity using techniques learnt.
- c. Explore appropriate strategies for communicating with stakeholders.
- d. Arrange to attend the networking session identified.

Provide the following evidence:

- a. Discuss using a suitable written communication method, your approach, strategies, and techniques used to Identify, create, and explore the network opportunity. Explain the opportunities identified and why these were applicable to your network.
- b. Email to the organisers as confirmation of attending the function.
- c. Feedback Report explaining your approach and method of personal interaction at the function. Make special reference to the techniques used during the session to establish the connection.

5. Relationships in the workplace need re-kindling, create a plan of action to establish constructive relationships with your Manager. Before you can create the plan of action you need to have a discussion session with Management to inform them, what you plan on implementing to establish constructive relationships.

- a. Plan for the discussion including the necessary preparation (techniques that you will use to seek and exchange information)
- b. Arrange the discussion session with Management in which you Lead the Discussion.
- c. Inform Managers of daily activities, progress, and results as they are at present.
- d. Advise on how the communication methods of activities, progress and results of these activities can be improved.
- e. Get input from managers on their thoughts on promoting constructive relationships and interactions.
- f. Address any quality of work issues that may not be meeting quality requirements in accordance with your organisations policies and procedures.

Provide the following as evidence:

- a. Your planned and prepared notes for the discussion.
- b. A video of you leading the discussion.
- c. A detailed feedback report on the discussions taken place during the session, advice given and remedial actions that will be taken to rectify.

- d. A plan of action developed to establish constructive relationships.
- e. Complete Observation of your performance during the discussion from your Manager – in logbook

6. Arrange a Team Briefing with your team, you need to discuss general matters involving the team's performance and personal conflict within the team. In the briefing you need to inform members of the following:

- a. Procedures for personal conflict.
- b. How the team is performing in general.
- c. Areas for improvement and or changes.
- d. Feedback of performance.
- e. Analyse a variety of feedback practices, compare the feedback you were given and received, to a variety of feedback practices.

Provide the following evidence:

- a. Team Briefing confirmation of information discussed, this can be in the form of an email to the team.
- b. Written feedback to the team and or each member, providing written feedback on performance as discussed in the Team briefing, as well as recipient of their reply to the feedback received. This can be in the form of an email conversation.
- c. a and b can be combined in one email, if comprehensively and clearly stated in writing.
- d. Request your team to provide you with feedback on your performance as leader, how well you interact and engage, what you could do differently, is there something that you do or say that causes ill feeling, etc. This can be in an email or develop an evaluation form for them to complete and provide the completed evaluations.
- e. In a suitable professional formatted document explain how the feedback you provided to your team, that they provided you with, compared to the analysed practices and what would you do differently?

7. Identify conflict situations in your immediate workplace, this may be conflict between other parties or involving yourself, then answer the following questions in a suitable document format:

- a. Explain the conflict situation.
- b. What action would you take to resolve the conflict in accordance with organisational policies and procedures.
- c. What impact would emotional intelligence have on the situation? Motivate both positive and negative.

- d. Develop a strategy using a consultative process to assist all involved to develop their goals and objectives.

8. You are required to provide evidence that you can generate a variety of workplace reports. Choose 5 reports that you use and work within your immediate workplace. Provide the following information about the reports:

- a. Name or Title.
- b. Regular Recipients.
- c. Frequency.
- d. Information Source – this is not who you receive the report from.
- e. Business Reason for the Report.

Provide a short explanation of each report, explaining the business need, how the report establishes connections between the recipients, the consequences of not reporting accurately for the report and what are the policies and procedures governing the issuing of the report.

This can be presented in a document format of choice. Choose wisely and ensure the information meets with and displays communication techniques to ensure understanding by the recipient of the document.

Feedback to Learner:

Result of First Assessment	C	NYC	Date
Result of Second assessment	C	NYC	Date
Result of Third Assessment	C	NYC	Date
Learner Signature			Date
Assessor Signature			Date
Moderator Signature			Date

SUMMATIVE ASSESSMENT ACTIVITY 3 – REFLECTION



US 252031 SO 4

CCFO: 1 - 6

EEK 1 - 4

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

Observe and Analyse your responses and reactions to various situations both in the workplace and in life, then answer the following questions: *This shouldn't be a rushed activity and must take past and present reactions and responses into consideration over a period.*

1. Based on the general reactions and responses to the situations, in a document answer discuss the following:

- a. How do they relate to the 5 principles of emotional intelligence?
- b. On a scale of 1 – 5 How would you rate your current emotional intelligence level. Where 5 is “definitely emotionally intelligent” and 1 – “emotional growth needed”
- c. What would you change?
- d. How would you rather have responded or reacted to the situation?
- e. What are your strengths and weaknesses?
- f. How do your strengths and weaknesses affect the people around you both in the workplace and home?
- g. In a previous assessment, you were tasked to ask your team feedback based on your actions and reactions in situations, what did you learn from this and how would you implement the changes?
- h. What emotional habits will you change going forward?
- i. What emotional intelligence techniques will you apply in future?

Provide the following as evidence:

- a. Suitably prepared document, logically arranging and discussion on all points mentioned above.

2. Develop a Professional Development Plan for yourself in a suitable format, ensure to cover the following:

- a. Development area
- b. Why do I need to develop this area?
- c. What action(s) must I take?
- d. Who can help me with this?
- e. What resources do I need?
- f. Deadline for completion

Provide the completed Professional Development Plan as evidence.

Feedback to Learner

Result of First Assessment	C	NYC	Date
Result of Second assessment	C	NYC	Date
Result of Third Assessment	C	NYC	Date
Learner Signature			Date
Assessor Signature			Date
Moderator Signature			Date

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?		
Did the assessor explain the reason for the assessment		
Did you receive a copy of the Unit standard/s you were being assessed against		
Did the assessor explain the assessment methods and criteria?		
Where the instructions for each assessment clear?		
Did your assessor provide you with developmental feedback?		
Do you agree with the feedback?		
Additional Comments:		
Learner Name		
Signature:		
Date:		

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	
Assessor Name	
Programme Name:	
Date:	
Areas of development and additional evidence required	
Resubmission date	
Learner Signature	
Assessor Signature	