

# SAQA ID 59201

## NATIONAL CERTIFICATE: GENERIC MANAGEMENT CLUSTER 4

Accredited  
course  
information:

Unit Standard ID

NQF Level

Credits

12140

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

LEARNER POE

**Accredited  
course  
information:**

**Unit Standard ID**

**NQF Level**

**Credits**

**252034**

**5**

**8**

Monitor and evaluate team members against performance standards

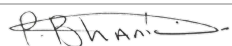


# TABLE OF CONTENTS

Pre-assessment meeting checklist.....	4
Assessment plan .....	5
Formative assessment .....	5
Summative Assessment Activities.....	13
Learner Evaluation of the Assessment Process.....	18
Development Plan .....	23

## PRE-ASSESSMENT MEETING CHECKLIST

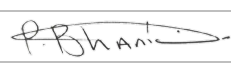
The **Qualification Induction Video** would've clearly explained all the items below. If you are not sure, revert to the video and ensure understanding before completing this checklist.

#	POINTS TO BE DISCUSSED	✓
Did the facilitator/Assessor:		
1.	Provide a clear explanation of Outcomes-based assessment and the NQF system.	
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 documents indicating the evidence, methods, resources, timing and special needs	
10.	Discuss the importance of confidentiality of 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.

**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									
Assessor Declaration	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				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 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				

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2nd	3rd
	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

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2 <sup>nd</sup>	3 <sup>rd</sup>
<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				
<b>SO4: Manage the implementation of the people development plan of a unit.</b>								
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				

	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2 <sup>nd</sup>	3 <sup>rd</sup>
	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

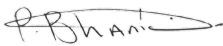
	Specific Outcomes and Assessment Criteria	Assessment	Evidence	Method	C	NYC	2 <sup>nd</sup>	3 <sup>rd</sup>
<b>SO1: Formulate performance standards for team members in a unit.</b>								
1.1	Performance standards to be achieved by team members are formulated in relation to the unit's goals, objectives 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				

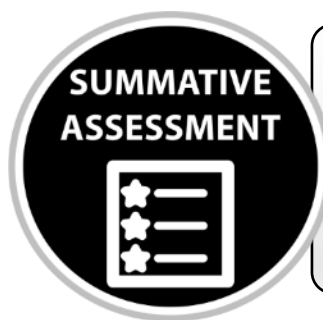
	<b>Specific Outcomes and Assessment Criteria</b>	<b>Assessment</b>	<b>Evidence</b>	<b>Method</b>	<b>C</b>	<b>NYC</b>	<b>2<sup>nd</sup></b>	<b>3<sup>rd</sup></b>
	the time, place and nature of the review.							
3.2	Preliminary assessment of performance against the agreed standards is conducted using 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				
<b>SO4: Monitor and measure the results of coaching sessions.</b>								
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



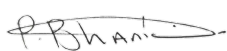
**Learner Instruction:** Please complete the following checklist to indicate that you have completed all the formative assessment activities required for your portfolio. These activities must have been completed on the DigiAssist System and evidence of each outcome pdf printed signed and placed behind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

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

#	SUMMATIVE ACTIVITY	TICK TO CONFIRM COMPLETION
1.	Summative Assessment Activity 1	
2.	Summative Assessment Activity 2	
3.	Summative Assessment Activity 3	
4.	Summative Assessment Activity 4	
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.

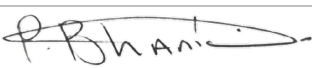
4. The Action Plan created for the recruitment and selection process.
5. The spreadsheet used to capture the applicants received.
6. A list of the shortlisted candidates.
7. Interview forms with notes and interview criteria for each of the 3 applicants interviewed.
8. An email of the feedback sent to 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:

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 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:

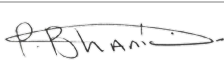
- a. The principles and roles of the Human Resources Development in building a competent workforce.
- b. Legal Frameworks that govern skills development and employment equity relevant to people development processes, refer to the NQF, SDA, EEA and BBBEE Scoring as well as the different type of delivery modes and methods of Learning (skills programs, learnerships, non-credit bearing)
- c. 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:**

1. A completed Training Needs Analysis of a Team and of at least 5 employees' in the team.
2. A comprehensive Training Needs Analysis report in correct written report format.
3. An email confirmation of a discussion between yourself and your Manager about the training needs analysis report.
4. Completed PDP for at least 1 of the Employee's
5. An action plan that tracks the progress of the implementation of the PDP.
6. 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:

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 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.

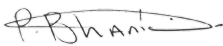
### Provide the following as evidence:

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:

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 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.

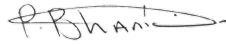
### Provide the following as evidence:

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.

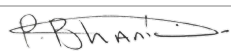
Remember that personal information may be changed to protect the identity of the individual.

Feedback to Learner:

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	

# LEARNER EVALUATION OF THE ASSESSMENT PROCESS

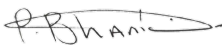
Kindly complete the form below to provide feedback to the assessor

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	