|  |  |
| --- | --- |
| **Unit standard ID:**  242817  242811  242816  15234 | **Unit standard title:**  Solve problems, make decisions and implement solutions  Prioritise time and work for self and team  Conduct a structured meeting  Apply efficient time management to the work of a department/division/section |

**Learner PoE**

**Workbook**

**Personal effectiveness**

Portfolio of Evidence

|  |  |
| --- | --- |
| Learner name and surname |  |
| Learner ID number or alternative ID |  |
| Learner telephone number |  |
| Date of submission |  |
| Return address for the Portfolio of Evidence |  |
| Manager or Supervisor’s Name |  |
| Contact details |  |
| Special needs |  |

*I hereby declare that the assessment process as contained in this guide was discussed with me and that I agree to be assessed on these principles*

**Learner Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**LEARNER ORIENTATION**

**See Unit Standard Guide for detailed information:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 242817 | Solve problems, make decisions and implement solutions | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Generic Management | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Generic Management | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular-Fundamental | Level 4 | NQF Level 04 | 8 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 242811 | Prioritise time and work for self and team | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Generic Management | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Generic Management | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular-Fundamental | Level 4 | NQF Level 04 | 5 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 242816 | Conduct a structured meeting | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Generic Management | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Generic Management | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular-Fundamental | Level 4 | NQF Level 04 | 5 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |
| **SOUTH AFRICAN QUALIFICATIONS AUTHORITY** | | | | | | |

|  |
| --- |
| **REGISTERED UNIT STANDARD:** |
| **Apply efficient time management to the work of a department/division/section** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 15234 | Apply efficient time management to the work of a department/division/section | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Generic Management | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Generic Management | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular-Fundamental | Level 5 | Level TBA: Pre-2009 was L5 | 4 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |

**ASSESSMENT OVERVIEW**

**Assessment Instruments**

Formative Assessment

The Formative Assessment consists of assessments at the end of each chapter in the Learner PoE Workbook for you to complete and submit as part of your Portfolio of Evidence. These activities have been designed around the specific outcomes of your unit standards and will assist in showing areas where you may need more help, as well as where your strengths are. Upon completion of these tests, submit them as your Formative Assessment.

Summative Assessment

The Summative assessment is the assignment and or project to be completed after the contact session and is attached to this page. The Summative assessment must often be completed in consultation with your Line Manager / Coach. You may also consult with work colleagues. This is not “cheating” and it is the responsibility of the line-manager or coach to ensure that the project you have tackled is realistic and that the assignment adds value to yourself (in terms of your learning) and to the organisation.

Please note that the questions asked in the Summative assessment may not deal DIRECTLY with the outcomes listed in the unit standards linked to the assignment. It is your responsibility, as you complete the assignment, and the formative assessment, to ensure that you provide the assessor with sufficient evidence of competence against ALL the outcomes of the programme provided.

The recommended process of learning and applying your learning is as follows:

1. Workshop/ Contact time: Deepen your knowledge in the subject area and explore how the theories, concepts and ideas apply to your role within the organisation. Ask questions and share ideas with other learners.
2. Formative Assessment: Upon completion of the workshop, complete and collate all the activities, case studies and exercises that were covered during the workshop (including additional ones provided by the facilitator)*.*
3. Summative Assessment: Draft an outline of the assignment answer; check it against the unit standard outcomes and assessor guidelines. Ensure that all the outcomes have been covered in your assignment and/or the formative assessment. Now complete the final draft of your assignment.

**Portfolio of Evidence**

Your portfolio of evidence is the combination of the Formative and Summative assessment. It is critical that you keep a copy of the whole portfolio as the assessor’s comments will refer to specific page numbers of the portfolio.

**INSTRUCTIONS TO THE LEARNER:**

1. This Learner POE Workbook is designed to assist you in compiling your Portfolio of Evidence.
2. Learners must comply with the following Code of Conduct during facilitation sessions:

* Learners will abide by the time frames for training as contracted with them by the facilitator/assessor.
* Learners will sign the attendance register on each day of training.
* Learners must complete the **Learner Registration Form** and evaluate the training after completion on the **Learner Feedback Form**.
* Learners that are assessed to obtain credits towards a qualification, have to sign the assessment contract and have to complete all assessments as instructed by the assessor.
* If a learner cannot attend the training/assessment opportunity, the reasons for his absence must be registered with the responsible person(s) of the contracted client.
* Learners will treat each other and the facilitator with respect during the training/assessment opportunity.
* Learners must ensure that cell phones must be switched off during training.

1. Ensure that you initial every page of your Portfolio of Evidence in the space provided on the bottom of each page. This is important to ensure authenticity.
2. Learner must sign all documents required in sections A and D.
3. ALL formative and summative activities must be completed in order to be deemed competent against the unit standard.
4. The declaration of Authenticity form MUST be signed and if evidence was collected in group activities, it should be declared on this form.
5. The learner must take note that he/she will have three assessment opportunities to show competence against the outcomes of the unit standard.
6. The learner must make himself aware of the Re-assessment and Appeals Procedure.

Section A

CV and **CERTIFIED COPY OF ID** of Learner

Complete the CV below or attach a copy of your own CV.

|  |  |
| --- | --- |
| **NAME AND SURNAME** |  |
| **HIGHEST SCHOOL QUALIFICATION** |  |
| **OTHER QUALIFICATIONS** |  |
| **POSITION IN ORGANISATION** |  |
| **HOW LONG HAVE YOU BEEN IN THIS POSITION** |  |
| **GIVE A BRIEF DESCRIPTION OF YOUR WORK EXPERIENCE:** | |
| **SIGNATURE** |  |

Assessment Information

|  |  |
| --- | --- |
| **LEARNER INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |
| Postal address |  |
| **ASSESSOR INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |
| **MODERATOR INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |

# DECLARATION BY MENTOR

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Please complete the following declaration and Critical Cross-field checklist and ask your supervisor or mentor to also complete the list below:* I hereby declare that the work submitted in the Portfolio of Evidence | | | Self- Assessment | | Supervisor/ Mentor |
| Is the Learner’s own work (authentic) | | |  | |  |
| Is a reflection of the learner’s current competencies? | | |  | |  |
| Would you rate the learner as competent in the following Critical Cross-field Outcomes? | | | | | |
| The learner has shown the ability to Identify and solve problems | | |  | |  |
| The learner has shown the ability to Organise and manage himself or herself and his/her activities responsibly and effectively | | |  | |  |
| The learner has shown the ability to Collect, organise and critically evaluate information | | |  | |  |
| The learner has shown the ability to Communicate effectively using visual, mathematical and language skills | | |  | |  |
| The learner has shown the ability to Demonstrate an understanding of the world as a set of related systems | | |  | |  |
| The learner has shown the ability to act culturally and aesthetically sensitive across a range of social contexts | | |  | |  |
| The learner has shown the ability to use Science and technology effectively and critically | | |  | |  |
| The learner has shown the ability to Work effectively with others as a member of a team, group, organisation and community | | |  | |  |
| Learner signature | |  | Date | |  | | |
| Mentor/Supervisor signature | |  | Date | |  | | |

# DECLARATION OF AUTHENTICITY

# I, .....................................................................................(full names of learner), declare that the contents of this portfolio are entirely my own original work. I understand that any evidence I submit needs to be my own product and if evidence were found to be fake or a duplicate of another learner’s work, I may forfeit the opportunity to be assessed.

# The following are items or documents that are not entirely my own original work.

|  |  |
| --- | --- |
| **Name of document** | **Page nr/Section in portfolio** |
|  |  |
|  |  |
|  |  |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signature of learner Date**

# 

# Learner Assessment Contract

|  |  |
| --- | --- |
| Learner name: |  |
| Assessor name: |  |
| Unit standard assessed: | 242817; 242811; 242816; 15234 |
| Date: |  |
| **Your rights as a learner:**   * You have the right to appeal against any judgement given as a result of any assessment. You must have a valid reason for doing this. * You have the right to an interpreter if you need one to perform this function. However, if one of the learning assumptions for the standard is that you are competent within the language of assessment you may not have an interpreter. * You can ask that an impartial observer attend any assessment. This observer may not take part in the assessment. * If you do not agree with the assessment you have the right to have your assessment internally moderated. If you still do not agree with the result of the assessment you can ask that the ETQA perform an external moderation on the assessment. If any verification upholds the assessment findings you will be held liable for all costs of the verification. If any verification rules that you have been aggrieved as a result of the assessment, your assessor will be liable for all cost of verification. * If you are found NOT YET COMPETENT, your assessor will encourage you to master the areas where you have not reached competency. You are required to arrange a new assessment date with the assessor. The assessor can only permit two re-assessments. If you as the learner has not reached competence after the three assessment attempts, your assessor may remove you from the programme and will direct you towards another learning path. | |
| **Confidentiality**  Each assessment application, the outcomes, results and reviews will be treated as a confidential matter by learners, assessors and moderators. No references will be made to anyone or any organisation outside the SETA about the status of an application during the assessment process. | |
| **Consent**  I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, the learner, hereby state that I have read the above and understood the content thereof. I was given the opportunity to clarify any issues relating to the assessment process and my assessment plan.  Learner signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |

Section B: Formative Assessments

**Solve Problems, make decisions and implement solutions**

|  |
| --- |
| **Formative Exercise1A** |
| **Instructions:**  Identify a problem that you have experienced in the workplace and found difficult to solve. This problem statement will be used for all the formative exercises in this course, so think it through thoroughly before choosing a problem. Now use the guideline below as well as guidelines provided in the modules of part 1 in your Learner Guide to:  1. Explain three techniques below for problem solving  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  2. NOW:   1. Define the problem 2. Analyse the problem 3. Determine factors which caused the problem.   **Situation Analysis Worksheet**   |  |  |  | | --- | --- | --- | | Step | Action | | | 1. | Write down the problem. | | | 2. | Separate the problem into its related parts. (use the diagram below) | | | 3. | Determine which pieces are probable causes and which are results. Draw arrows into the centre for “cause”, out for “results: | | | 4. | Assign S.U.G. priorities for each cause (H = High, M – Medium, L = Low) | | | Seriousness: | How bad? How big? How much money? | | Urgency: | Must it be taken care of today? Will next week be just as good? | | Growth: | Is the cause getting worse? Or is it already as bad as it is going to get? | | 5. | Label the major causes: “Problem”, “Decision”, “Plan” or “New Situation Analysis”. | |   **Separate the problem in its related parts**   |  |  | | --- | --- | | 1. | **Problem Statement:** |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | **2.** | **IS** | **IS NOT** | 1. **Difference/Distinctive features** | 1. **Change** | | What? |  |  |  |  | | - Defect? |  |  |  |  | | - Object |  |  |  |  | | Where? |  |  |  |  | | When? |  |  |  |  | | Extent? |  |  |  |  | |
| |  |  | | --- | --- | | 5. | Probable Causes: | | 6. | Test the Probable Causes Statements against the Initial Set of IS and IS NOT Facts. | | 7. | Verify the Most Probable Cause. |   **Timeframe:15 hours** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Formative Exercise1B** | | | | | |
| **Instructions:**  The purpose of this exercise is to ensure that you are able to engage with stakeholders in the problem-solving process.  Take the problem you worked with in Formative assessment 1A and do the following: (Your answers are to be reflected on a separate answer sheet)   1. **Identify** who the stakeholders are that you would involve in this problem-solving process 2. **Explain** the process you will follow to engage with stakeholders, including what you would explain and how you would go about to gain their co-operation. (Include here practical ways in which the stakeholders would be engaged as well as in what steps of the problem-solving process you would engage with stakeholders.) | | | | | |
| **Timeframe:5 hours** | | | | | |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Formative Exercise 1C** | | | | | |
| **Instructions:**  Use one of the methods described in learning unit 4 to:   1. **Analyse** the inputs of stakeholders in finding a solution 2. **Prioritise** solutions considering outcomes and external impact 3. **Select** a solution considering interrelated issues | | | | | |
| **Timeframe: 5 hours** | | | | | |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Formative Exercise 1D** | | | | | |
| **Instructions:**  Using the guidelines in learning unit 5, **describe how you would plan and implement solutions** including:   1. Stakeholders you will communicate with during the solution phase and how what and when you will communicate with them 2. A complete implementation plan needs to be handed in, including actions, responsibilities, resources and timelines 3. Important factors you would consider in the implementation, including communication, support, stakeholders, monitoring of the process (this process is called change management)   **Remember to add all the names of your group and their signatures.** | | | | | |
| **Timeframe: 8 hours** | | | | | |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

**Prioritise Time and Work for Self and Team**

|  |
| --- |
| **Individual Formative exercise 2A** |
| **Instructions: Answer the following questions:**   1. From your Learner Guide, give reasons why it is important to compile a task list.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Give one example at each of the following sub-sections:    1. An example where you failed to prioritise work. Also describe the consequences \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   * 1. An example where you planned in detail. Describe the consequences.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Think about a normal day at work. What criteria will you apply to prioritize your actions.  |  |  |  | | --- | --- | --- | | Values | Personal criteria | Work criteria | | e.g., Kids wellness above all |  | E.g., same day response to clients | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  |  1. Describe the ABCD system for priority-setting.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Explain the purpose of a diary.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Give a description of what stakeholders are, and describe why they are important in planning/prioritising?   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Describe how you would:    1. Assign resources \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   * 1. Assign people to help with task list \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   * 1. Monitor your task list \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   * 1. Update your task list \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Timeframe:5 hours** |

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| **First attempt** | | | **Second attempt** | | **Third attempt** | |
| Competent | | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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| Individual **Individual Formative Exercise 2B** | | | | | |
| **Instructions :** Complete Self - assessment questionnaire | | | | | |
| **Time Frame: 1 hour** | | | | | |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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**EFFECTIVE TIME MANAGEMENT QUESTIONNAIRE**

### A. Instruction

Finish the following statements as if the sentence began with: How often do you …?

Use the following scale:

**Scale: Always** = A Often = B Once in a while = C Never = D

| **STATEMENT** | **A** | **B** | **C** | **D** |
| --- | --- | --- | --- | --- |
| 1. Work at a tidy desk with everything in its place |  |  |  |  |
| 1. Make an early start to your working day |  |  |  |  |
| 1. Take work home in the evening |  |  |  |  |
| 1. Plan (in written form) for the week ahead |  |  |  |  |
| 1. Do tasks in order of importance |  |  |  |  |
| 1. Put off making decisions |  |  |  |  |
| 1. Spend more time making lists than doing what you have listed |  |  |  |  |
| 1. Put off doing unpleasant jobs and do those you enjoy instead |  |  |  |  |
| 1. Make a daily list of important things to do |  |  |  |  |
| 1. Get interrupted during your working day |  |  |  |  |
| 1. Forget to do things of which you made a mental note |  |  |  |  |
| 1. Find yourself unable to say NO to a request |  |  |  |  |
| 1. Try to be perfect, dotting every ‘i’ and crossing every ‘t’ in your work |  |  |  |  |
| 1. Have to check on work done by others and have to change what they have done |  |  |  |  |
| 1. Have enough time to give attention to your colleagues or staff |  |  |  |  |
| 1. Keep a daily diary and use it |  |  |  |  |
| 1. Analyse how you use your time and know exactly where it goes |  |  |  |  |
| 1. Waste other people’s time |  |  |  |  |
| 1. Do work that someone else should be doing |  |  |  |  |
| 1. Try to do more than one job at the same time |  |  |  |  |
| 1. Cancel engagements or appointments at short notice |  |  |  |  |
| 1. Spend more time than necessary on the telephone |  |  |  |  |
| 1. Attend meetings at which you have nothing to say |  |  |  |  |
| 1. Make appointments to see people at a fixed time |  |  |  |  |
| 1. Write ideas down on paper as soon as they come to mind |  |  |  |  |

# B. Scoring

Score each item according to the ratings below and then add up to get your total score.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **A** | **B** | **C** | **D** |  |  | **A** | **B** | **C** | **D** |
| **1.** | 0 | 2 | 3 | 4 |  | **14.** | 4 | 3 | 2 | 0 |
| **2.** | 0 | 2 | 3 | 4 |  | **15.** | 0 | 2 | 3 | 4 |
| **3.** | 4 | 3 | 2 | 0 |  | **16.** | 0 | 2 | 3 | 4 |
| **4.** | 0 | 2 | 3 | 4 |  | **17.** | 0 | 2 | 3 | 4 |
| **5.** | 0 | 2 | 3 | 4 |  | **18** | 4 | 3 | 2 | 0 |
| **6.** | 4 | 3 | 2 | 0 |  | **19.** | 4 | 3 | 2 | 0 |
| **7.** | 4 | 3 | 2 | 0 |  | **20.** | 4 | 3 | 2 | 0 |
| **8.** | 4 | 3 | 2 | 0 |  | **21.** | 4 | 3 | 2 | 0 |
| **9.** | 0 | 2 | 3 | 4 |  | **22.** | 4 | 3 | 2 | 0 |
| **10.** | 4 | 3 | 2 | 0 |  | **23.** | 4 | 3 | 2 | 0 |
| **11.** | 4 | 3 | 2 | 0 |  | **24.** | 0 | 2 | 3 | 4 |
| **12.** | 4 | 3 | 2 | 0 |  | **25.** | 0 | 2 | 3 | 4 |
| **13.** | 4 | 3 | 2 | 0 |  |  |  |  |  |  |

### C. Interpretation

The maximum possible score is 100 and the minimum is zero.

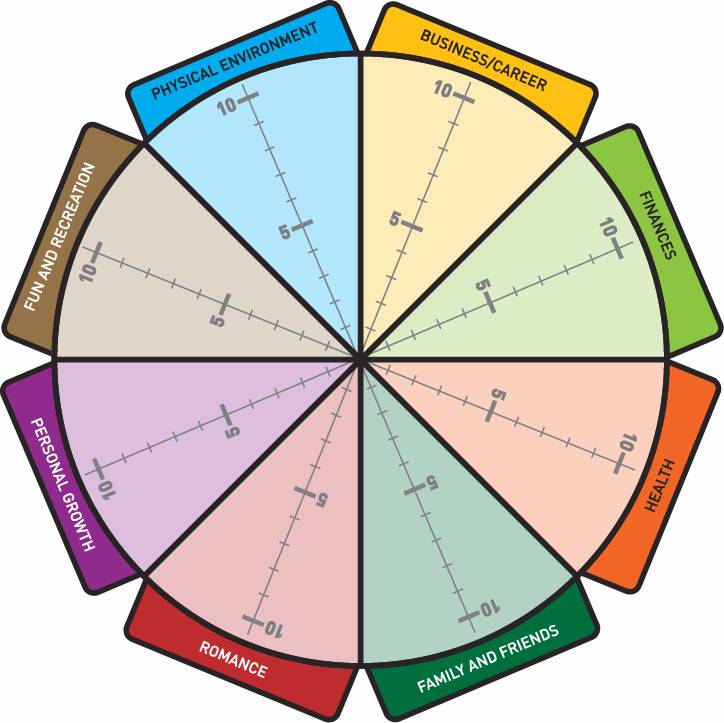
|  |
| --- |
| **High score =** the more you could improve your time management. |
| **Low score** **=** the better you are at managing your time. |

**Your score:**

|  |
| --- |
|  |
| **100** |

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| **LIST YOUR IMPROVEMENT AREAS** | | | | | | | | |
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| **LIST YOUR STRENGTHS** | | | | | | | | |
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| Individual **Individual Formative Exercise 2C** | | | | | | | | |
| **Instruction:** Complete the self-assessment questionnaire  **Time Frame: 1 hour** | | | | | | | | |
| **First attempt** | | | **Second attempt** | | **Third attempt** | | | |
| Competent | Not yet competent | Competent | | Not yet competent | | Competent | Not yet competent | |
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## The wheel of life



1. Start by identifying the 6 to 8 dimensions of your life that are important for you. Different approaches to this are:
   * **The roles you play in life** for example: husband/wife, father/mother, manager, colleague, team member, sports player, community leader, or friend;
   * **Areas of life that are important to you** for example: artistic expression, positive attitude, career, education, family, friends, financial freedom, physical challenge, pleasure, or public service; or
   * **Your own combination of these (or different) things**, reflecting the things that are your priorities in life.
2. Write down these dimensions down on the Wheel of Life diagram, one on each spike of the life wheel.
3. This approach assumes that you will be happy and fulfilled if you can find the right balance of attention for each of these dimensions. And different areas of your life will need different levels of attention at different times. So, the next step is to assess the amount of attention you're currently devoting to each area.  
     
   Consider each dimension in turn, and on a scale of 0 (low) to 5 (high), write down the amount of attention you're devoting to that area of your life. Mark each score on the appropriate spoke of your Life Wheel.
4. Now join up the marks around the circle. Does your life wheel looked and feel balanced?
5. Next, it's time to consider your ideal level in each area of your life. A balanced life does not mean getting 5 in each life area: some areas need more attention and focus than others at any time. And inevitably you will need to make choices and compromises, as your time and energy are not in unlimited supply!  
   So the question is, what would the ideal level of attention be for you each life area?  
   Plot the "ideal" scores around your life wheel too.
6. Now you have a visual representation of your current life balance and your ideal life balance. What are the gaps? These are the areas of your life that need attention.   
     
   And remember that gaps can go both ways. There are almost certainly areas that are not getting as much attention as you'd like. However, there may also be areas where you're putting in more effort than you'd ideally like. These areas are sapping energy and enthusiasm that may better be directed elsewhere.
7. Once you have identified the areas that need attention, it's time to plan the actions needed to work on regaining balance. Starting with the neglected areas, what things do you need to start doing to regain balance? In the areas that currently sap your energy and time, what can you STOP doing or reprioritize or delegate to someone else?

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| **Group Formative Exercise 2D** |
| **Instruction**:   1. **Identify and demonstrate** Strategies to deal with interruptions in your workplace. Communicate in your group specific examples in your work or personal environment. 2. Also **identify** the top time wasters that impact on the organisation’s productivity and **explain** in short how their negative influence can be minimized.   **Time Frame: 4 hours** |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **First attempt** | | **Second attempt** | | **Third attempt** | | | Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent | |  |  |  |  |  |  | |
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**Conduct a Structured Meeting**

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| Individual**Individual Formative Exercise 3A** |
| **Instructions:**  **Prepare a checklist** that will assist you in conducting effective meetings at your workplace. Your checklist must include at least the following criteria:   * You have criteria to measure the effectiveness for all the phases of a meeting, i.e. planning, conducting, implementing and monitoring * Whom to invite * The agenda * Physical arrangements for the meeting * Outcomes of the meeting * Roles of participants * Documents required for meeting * Criteria for minutes of the meeting * Criteria for how the meeting is conducted * Criteria to measure participation in the meeting * Criteria for how items are actioned * Criteria how to deal with differences * Criteria on how progress is ensured during meeting   Your learner guide provides guidelines for each of the above criteria, which can be used in compiling your checklist. |
| **Timeframe:5 hours** |

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| --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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| --- |
| Individual**Individual Formative Exercise 3B** |
| **Instructions:**  Identify a typical meeting that you will be required to arrange or attend in the workplace.   1. Shortly describe the meeting.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Explain the purpose of the agenda for a meeting.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. List the outcomes you would typically expect from this meeting.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Describe how participants can add items for discussion to the agenda.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. List the participants you would typically invite to such a meeting and describe their roles at the meeting.  |  |  | | --- | --- | | Participants | Role | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  | |  |  |  1. Explain the purpose of recording the meeting.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   1. Complete the table below.  |  |  |  | | --- | --- | --- | | List documents to be prepared for this meeting | What procedure do you follow to check this document for accuracy and completeness prior to distribution | How and when are these distributed to invitees | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  |  1. Describe at least two techniques to overcome lack of progress in meetings that are caused by differing opinions.   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Timeframe:5 hours** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

**Section C: Summative Assessments**

## 

## Summative Exercises

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| --- |
| Summitive **S1 Summative Exercise:** |
| 1. **Identify a problem** which you have experienced for a long time and found difficult to solve. Use the templates provided for the formative exercises to follow the whole problem-solving process for this problem: 2. Define the problem 3. Diagnose the cause 4. Find a solution 5. Plan and Implement solution 6. Monitor/evaluate   Throughout the process it must be clear that who was involved in every step. The identification and communication to stakeholders must also be shown very clearly.   1. **Schedule a meeting** with your manager and work team/colleagues to discuss the problem as well as your solution to the problem. **For your PoE you need to submit:**    1. the Agenda    2. the Minutes of the meeting – checked and signed off by you and the supervisor    3. a checklist (as designed by you in FA 3A) completed by your supervisor where he/she has evaluated your competency in conducting a meeting.   **\*(refer note below)**   1. A **detailed planning sheet** to implement one solution as agreed to in (1),    1. This planning sheet must demonstrate your competency to implement Part 2 (Prioritise time) 2. **Indicate** how you will monitor the effectiveness of your solution in order to take corrective action, if required. |
| **Time frame: 50 hours** |

## \*Notes for meeting

You need to conduct a meeting as required.

Be sure to cover the following and include in your evidence:

* Agenda pre-set and distributed
* Minutes should reflect participation of participants at meeting
* Minutes should reflect next steps, completion dates and responsible person.
* Your supervisory should indicate in his feedback how effective you were in dealing with differences in opinions.
* A short evaluation of how effective your meeting was and how you can improve on it in future.

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| --- | --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | | Not yet competent |
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| --- |
| Summitive **S2 Summative Exercise:** |
| **Instructions: Identify a project you would like to organise**. You have one month for completion of this specific project that you identified.  For the PoE you need to do the following:   1. Identify the tasks to complete this project successfully. (Use the master list for this). You can have only one master list for the month. 2. Break the activities from your master list down into a task list (To-do-list). You have to complete all components of the to-do-list, including tasks, resources, delegates, timeframes. Prioritize tasks according to ABCD prioritizing system. 3. Describe how you will diarize the tasks. 4. Identify tasks to be delegated and indicate whom it will be delegated to. 5. Also identify who your stakeholders are and describe how you would communicate with them 6. Describe how you would go about to update your task list, re-prioritize, monitor performance and resources and close off tasks. 7. Describe how you will monitor that the work of the team members. 8. Describe how you will go about to report progress to appropriate authorities. 9. Explain how you used the 80/20 principle when you identified the key tasks. 10. Describe how you eliminated and/or manage time wasters during the project.   (Use the templates provided in your Learner guide for this exercise)  **Add your completed templates with the all the documents for all the steps in your PoE.** |
| **Timeframe: 50 hours** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

**Template:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Master list for the week**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| **Activity description** | **Starting date** | **Due date** | **Estimated time to complete** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |
| 6. |  |  |  |
| 7. |  |  |  |
| 8. |  |  |  |

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| --- | --- | --- | --- | --- |
| **"TO DO LIST" DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | |
| **Tasks** | **Priority** | **Necessary Resources** | **When to begin?** | **When to end?** |
| A tasks |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| B tasks |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| C tasks |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| D tasks |  |  |  |  |
|  |  |  |  |  |
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**Section D: Assessor Mark Sheets**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcomes of each unit standard** | **Assessment criteria** | **Delineation of method of assessment**  **(Formative / Summative)** | **Assessed** | | **Competent** | | |
| **Date** | **Initial of assessor** | | **YES** | **NYC** |
| **US 242817** | | | | | | | |
| SO1: Define the problem | AC1: Problems are defined according to the verified information | Formative 1A  Summative 1 |  |  | |  |  |
|  | AC2: The rationale for consulting with stakeholders and role-players is explained to ensure that they contribute to the various stages of the problem-solving process | Formative 1B  Summative 1 |  |  |
|  | AC3: Techniques in the formation of the problem are explored and explained, according to theory and practice | Formative 1 A  Summative 1 |  |  |
|  | AC4: The technique is selected in line with the context of the problem | Formative 1 A  Summative 1 |  |  |
| SO2: Investigate the problem | AC1: A problem is investigated to ascertain the various components | Formative 1 A  Summative 1 |  |  | |  |  |
|  | AC2: Further information is obtained, if required, and all information is critically examined for its relevance to the problem | Formative 1 A  Summative 1 |  |  | |  |  |
| SO3: Generate problem solutions | AC1: Possible solutions are generated by using a range of problem-solving techniques | Formative 1C  Summative 1 |  |  | |  |  |
|  | AC2: Criteria are identified and weighted to enable the ranking of proposed solutions | Formative 1C  Summative 1 |  |  |
|  | AC3: Possible solutions are evaluated against the established criteria in order to determine suitability | Formative 1C  Summative 1 |  |  |
| SO4: Implement solutions | AC1: The optimum solutions are selected in accordance with given criteria | Formative 1D; 1B  Summative 1 |  |  | |  |  |
|  | AC2: Stakeholders are consulted prior to implementation, so as to obtain commitment | Formative 1D  Summative 1 |  |  |
|  | AC3: The selected solutions are implemented, according to organisational standards | Formative 1D  Summative 1 |  |  |
| SO5: Evaluate the effectiveness of the solution | AC1: Criteria for the measurement of the effectiveness of the solution are identified according to the problem definition | Formative 1D  Summative 1 |  |  | |  |  |
|  | AC2: The effectiveness of the solution is evaluated against the criteria | Formative 1D  Summative 1 |  |  |
|  | AC3: Corrective action is identified and applied, where possible | Formative 1D  Summative 1 |  |  |
| **US 242811** | | | | | | | |
| SO1: Create a task list | AC1: The purpose of the task list for self and one’s team is explained, using examples | Formative 2A  Summative 2 |  |  | |  |  |
|  | AC2: A task list is produced for the team, sequenced to meet organisational requirements | Summative 2 |  |  |
|  | AC3: Information and documentation required are recorded on the task list and flagged for further action | Formative 2A  Summative 2 |  |  |
| SO2: Prioritise personal and team tasks | AC1: Criteria for prioritising tasks are explained according to organisational, personal goals and values | Formative 2A  Summative 2 |  |  | |  |  |
|  | AC2: Information is recorded systematically in the diary according to generally accepted practice | Summative 2 |  |  |
|  | AC3: Resources and the acquisition thereof are identified according to the task list | Summative 2 |  |  |
| SO3: Use and maintain diary | AC1: The purpose of keeping a diary is explained with examples | Formative Assessment 2A |  |  | |  |  |
|  | AC2: Information is recorded systematically in the diary | Summative 2 |  |  |
|  | AC3: Actions are taken according to diary entries | Formative 2A  Summative 2 |  |  | |  |  |
| SO4: Implement and maintain personal and team task list | AC1: Assign tasks to team members according to the task list | Summative 2 |  |  | |  |  |
|  | AC2: Stakeholders are informed of the tasks that affect them | Summative 2 |  |  |
|  | AC3: The task list is followed and amended where necessary | Summative 2 |  |  |
|  | AC4: New tasks are added to the task list where necessary, and all outstanding work is reprioritised | Summative 2 |  |  |
|  | AC5: The work of team members is monitored to ensure tasks are achieved according to organisational requirements | Summative 2 |  |  |
|  | AC6: Completed tasks are reported to the appropriate authority and checked off the task list | Summative 2 |  |  |
| **US 242816** | | | | | | | |
| SO1: Prepare for a meeting | AC1: Physical arrangements and attendees required for a meeting are identified and a checklist is prepared and auctioned in terms of Standard Operating Procedures | Formative 3A  Summative 1 |  |  | |  |  |
|  | AC2: The purpose of an agenda, the expected outcomes of a meeting, the process of placing items on the agenda and the roles of the participants are explained in terms of Standard Operating procedures | Formative 3A & 3B  Summative 1 |  |  | |  |  |
|  | AC3: The purpose of recording a meeting is explained according to Standard Operating Procedures | Formative 3A & 3B |  |  |
|  | AC4: Documents required for a meeting are checked for accuracy and completeness and distributed, according to Standard Operating Procedures | Formative 3A & 3B |  |  |
|  | AC5: Minutes of the previous meeting are checked for accuracy and completeness | Formative 3A  Summative 1 |  |  |
| SO2: Conduct a meeting | AC1: A meeting is conducted according to a pre-planned agenda, and or Standard Operating Procedures | Formative 3A  Summative 1 |  |  | |  |  |
|  | AC2: Opportunities are created to allow effective participation by people attending the meeting | Formative 3A & 3B  Summative 1 |  |  |
|  | AC3: Discussions are summarised and recorded to indicate proposed action, completion date and responsible person | Formative 3A  Summative 1 |  |  | |  |  |
| SO3: Demonstrate techniques to deal with differing views during a meeting | AC1: Identify techniques to overcome potential lack of progress due to differing opinions during the meeting according to recognised theory and practice | Formative 3A & 3B  Summative 1 |  |  | |  |  |
|  | AC2: A technique is used to create progress in a meeting according to recognised theory and practice | Formative 3A & 3B  Summative 1 |  |  |
| SO4: Distribute records for a meeting | AC1: Records are compiled in such a way to enable the decisions of the meeting to be implemented | Formative 3A  Summative 1 |  |  | |  |  |
|  | AC2: Records are checked to ensure that they are an accurate reflection, prior to distribution | Formative 3A  Summative 1 |  |  |
|  | AC3: The meeting is reviewed and suggestions for improvement are made to enhance the effectiveness of future meetings | Formative 3A  Summative 1 |  |  | |  |  |
| **US 15234** | | | | | | | |
| SO1: Identify Time Management Profiles | AC1: Current time Management techniques and processes used by the learner to manage him/herself and him/herself and his/her vision/department/section are identified to aid future time management of the section. | Formative 2B  Summative 2 |  |  | |  |  |
|  | AC2: Weaknesses in current work processes are identified in terms of poor time management. | Formative 2A |  |  |
|  | AC3: The top time wasters that impact on the organisation’s productivity are identified with a view to minimizing their negative influence. | Formative 2D |  |  |
|  | AC4: The external forces that effect time utilization are identified, and an explanation is given on their effect with examples. | Formative 2D |  |  |
| SO2: Understand the principles of Time Management | AC1: The 80/20 principle in identifying key tasks is explained with examples | Formative 2A  Summative 2 |  |  | |  |  |
|  | AC2: Delegation as a means of utilization time and human resources correctly is explained with examples of good and bad practice. | Formative 2A  Summative 2 |  |  | |  |  |
|  | AC3: Prioritising as a technique to manage the work of a team/group/section is explored in relation the work of the specific group and a decision made as to which are of greater priority for the group. | Formative 2ASummative 2 |  |  |
|  | AC4: The principles of balance between the various aspects of one’s life is understood in terms of creating time for them all so as to optimize one’s life. | Formative 2C |  |  |
| SO3: Draw up time efficient work plans to carry out department/ division functions. | AC1: The organisation’s objectives are understood and clearly defined in terms of the work that has to be done by the department/division/section. | Summative 2 |  |  | |  |  |
|  | AC2: The objectives are translated into work plans for the department/division/section. | Summative 2 |  |  |
|  | AC3: The key activities required to complete a specific project are identified and all tasks and work procedures are analysed and assigned to a specific time frame. | Summative 2 |  |  |
|  | AC4: Persons to whom tasks can be delegated are identified and included in the plan. | Summative 2 |  |  |
|  | AC5: Plans eliminated and/or manage time wasters in the department/division/section. | Summative 2 |  |  | |  |  |
|  | AC6: Tasks are prioritised in terms of urgency and importance for the department/division/ section. | Summative 2 |  |  |
| SO4: Implement time efficient work plans | AC1: Delegation is used correctly by the manager and subordinates when applicable to get the work done. | Summative 2 |  |  | |  |  |
|  | AC2: Emphasis is placed on proactive measures such as efficient information flow, efficient meeting planning and management and administrative procedures in the daily work processes of the department/division/section to minimize time wasting. | Summative 2 |  |  |
|  | AC3: Plans are implemented once all involved are informed of their roles, duties and functions. | Summative 2 |  |  |
|  | AC4: Progress with work plans is monitored on an on-going basis and amendments are made where necessary. | Summative 2 |  |  |

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| Details of moderation | Name and signature of moderator: | Assessment result confirmed: | YES | NO |
| Comments of moderator: | | | | |

## CCFO Marksheet

|  |  |  |
| --- | --- | --- |
| **Critical Cross-fields** | **Competent/ Not Yet Competent** | **Assessor Comments - detail** |
| Identifying |  | The learners had to identify documents and concepts. |
| Organising |  | The learners had to organize documents. |
| Collecting |  | The learners had to collect information from superiors. |
| Communicating |  | The learners had to communicate in their groups as well as with colleagues. |
| Demonstrating |  | The learners had to demonstrate understanding of the learning material. |
| Contributing |  | The learners had to contribute to groupwork. |
| Working |  | The learners had to show understanding of working together with others in the organization. |

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| --- | --- | --- | --- |
| **Assessor Signature** |  | **Date** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Moderator Signature** |  | **Date** |  |

## Assessment Decision

|  |  |
| --- | --- |
| **OVERALL ASSESSMENT SCORE** | |
| 1. Meets all the criteria for all the specific outcomes of the unit standard. |  |
| 1. Meet some, but not all the criteria for the specific outcomes of the unit standard. |  |
| 1. Clearly do not meet the criteria for the specific outcomes of the unit standard. |  |
| 1. More evidence is required in order to make a judgement of competence. |  |

## VACS Analysis

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Assessor Name** | |  | | | | | |
| **Assessment Evaluated** | | 242817, 242811, 242816, 15234 | | | | | |
| **Date of Evaluation** | |  | | | | | |
|  | | **PRINCIPLE** | |  | | **ASSESSOR REPORT** | | **MODERATOR REPORT** |
| Validity of evidence | | Is the evidence appropriate and related to the specific outcomes? | | Y/N | | Yes | | Yes |
| Was there any evidence that prohibited the learner from meeting the assessment criteria? | | Y/N | | No | | No |
| Authenticity of evidence | | Is there proof that the evidence is the learner’s own work? | | Y/N | | Yes | | Yes |
| Currency of evidence | | Currency refers to the applicability of skills, knowledge and understanding in the present circumstances. Is the evidence current to the situation? | | Y/N | | Yes | | Yes |
| Sufficiency of evidence | | Is there enough evidence to meet all the criteria of the specific outcome to certify competency? | | Y/N | | Yes | | Yes |
| Will the learner be deemed competent if the learner’s performance is to be reported? | | Y/N | | Yes | | Yes |
| **Moderator Signature** |  | | | **Date** | |  | |
| **Assessor Signature** |  | | | **Date** | |  | |

## RE-ASSESSMENT AND APPEAL PROCEDURE

Learner completes the re-assessment and appeals application and delivers to the assessor

Assessor decides on actions to be taken:

* Discuss reasons and appropriate actions with learner
* Learner accepts and follows actions
* Assessor re-assess

Assessor or learner still not satisfied

* Appeals application together with actions taken and complete assessment portfolio to the internal moderator

Internal moderator discusses with assessor and learner together next steps and recommendations

* Re-assessment by moderator

Learner still not satisfied with results

* Appeals application, actions taken and complete assessment portfolio to the ETQA for verification

**The assessor has to provide the moderator with all appeals and re-assessment applications regardless of if the learner accepts the results of the re-assessment or not.**

Reassessment should comply with the following conditions:

* Reassessment should take place in the **same situation or context** and under the same conditions
* The **same method and assessment instrument** may be used, but the **task and materials should be changed**. However, they should be of the same complexity and level as the previous one(s).
* Where the methods and instruments are changed, they must be appropriate for the outcomes specified.
* On Appeal the learner must complete and sign the appeals application (see appendix B)
* On reassessment the initial assessment plan should be extended and accepted by the learner.

**NOTE:**

Where several outcomes have been assessed and some, but not all, were achieved successfully, a decision has to be made about the credits for the successful outcomes, i.e., will the learner be able to retain these credits without having to be reassessed? If so, what would the assessment consist of then?

Care should be taken regarding **how often reassessment can be taken**, and the length of time between the original assessment and the reassessment. At the initial discussion of the assessment process and appeals procedure the learner and assessor agree on the number of re-assessments. **A learner who is repeatedly unsuccessful should be given guidance on other possible and more suitable learning avenues.**

Learners should be secure in the knowledge that they can appeal against an unfair assessment.

**Appeals can be brought against:**

* Unfair assessment
* Invalid assessments
* Unreliable assessments
* The assessor’s judgment, if considered biased
* Inadequate expertise and experience of the assessor if it influenced the assessment.
* Unethical practices.

## 

## Appeals Application

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Standard Title** |  | **Unit Standard number** |  |
| **NQF level** |  | **Credits** |  |
| **Venue** |  | **Date** |  |
| **Learner Name** |  | **Learner ID number** |  |
| **Assessor Name and Surname** |  | **Assessor Registration number** |  |

|  |
| --- |
| **1. Please explain how you were assessed:** |
|  |
|  |
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|  |
|  |
| **2. Please list the reason(s) for your appeal:** |
|  |
|  |
|  |
| **3. Please indicate what course of action you would find acceptable in order to resolve this issue. (For example, another assessor, a different assessment method, etc)** |
|  |
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| **4. Please specify any additional requirements or needs you may have:** |
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| --- | --- | --- | --- |
| **Learner Signature** |  | **Date** |  |
| **Moderator**  **Signature** |  | **Date** |  |

| **Assessor Feedback to learner** | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Assessor Declaration of Competence | | 1st Attempt | | | 2nd Attempt | | | | | 3rd Attempt | |
| Competent | NYC | | Competent | | NYC | | | Competent | NYC |
|  |  | |  | |  | | |  |  |
| Date of declaration | |  | | |  | | | | |  | |
| Feedback | |  | | |  | | | | |  | |
| **Action Plan for Competence and Re-assessment** | | | | | | | | | | | |
| The learner was assessed on the following date: | | | | | | | | |  | | |
| The learner has not submitted sufficient evidence and is therefore not yet competent. | | | | | | | | | | | |
| The learner is required to submit additional evidence against the following: (List the specific outcome and assessment criteria relevant below) | | | | The learner is required to improve in the following areas: | | | | | | | |
|  | | | |  | | | | | | | |
|  | | | |  | | | | | | | |
| **Learner Declaration** | I, ………………………………………………………………. declare that I am satisfied that the feedback given to me by the Assessor was relevant, sufficient and done in a constructive manner. I accept the assessment judgment and have no further questions relating to this particular assessment instrument. | | | | | | | | | | |
| **Learner’s Signature** |  | | | | | **Date:** | |  | | | |
| **Assessor’s Signature** |  | | | | | **Date:** | |  | | | |
| **Moderator’s Signature** |  | | | | | **Date:** | |  | | | |

## Learner: Assessment Review

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| --- | --- | --- | --- | --- | --- | --- |
| **Learner name** |  | | | | | |
| **Assessor name** |  | | | | | |
| **Date of assessment** |  | | | | | |
| **Question** | | | | | **Yes** | **No** |
| Was the assessment process explained to you before the assessment? | | | | |  |  |
| Did the assessor have a pre-assessment meeting with you? | | | | |  |  |
| Did you receive feedback after the assessment? | | | | |  |  |
| Was the assessment feedback clear enough? | | | | |  |  |
| Did you receive your feedback within the agreed Timeframes? | | | | |  |  |
| Do you feel that the assessment was fair? | | | | |  |  |
| Do you feel that you received enough opportunities during the assessment to provide evidence to the assessor? | | | | |  |  |
| Did the assessor explain all the evidence requirements to you? | | | | |  |  |
| Were you given the chance to give your input in terms of the assessment process? | | | | |  |  |
| Was the evidence judged in accordance with the requirements outlined to you? | | | | |  |  |
| Was the feedback provided constructive? | | | | |  |  |
| Was the assessment documentation clear and user-friendly? | | | | |  |  |
| **Learner Signature** | |  | **Date** |  | | |
| **Assessor Signature** | |  | **Date** |  | | |
| **Moderator Signature** | |  | **Date** |  | | |

## 

## Assessor: Assessment Review

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| --- | --- | --- | --- | --- | --- |
| **Assessor name** |  | | | | |
| **Date of assessment** |  | | | | |
| **Assessment Review** | | | **Agree** | | **Disagree** |
| The learner provided inputs into the assessment process. | | |  | |  |
| Before the assessment was conducted the learner understood what criteria and evidence will be used in the assessment process. | | |  | |  |
| The assessment process was conducted in the learner’s work environment. | | |  | |  |
| The assessment instruments were clear and easily understood by the assessor. | | |  | |  |
| In similar circumstances the assessor will make the same judgment again. | | |  | |  |
| The evidence requirements are relevant to the unit standards. | | |  | |  |
| The evidence identified for this portfolio is sufficient. | | |  | |  |
| The evidence produced by the learner can be verified as being authentic. | | |  | |  |
| The assessment methods are suitable for the outcomes being assessed. | | |  | |  |
| The assessment does not present any barriers for the learner. | | |  | |  |
| All special needs have catered for and considered during the assessment. | | |  | |  |
| The assessment instruments were manageable and user-friendly. | | |  | |  |
| **General Comments:** | | | | | |
| **Assessor Signature** |  | **Date** | |  | |
| **Moderator Signature** |  | **Date** | |  | |

## Assessment Review Report

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Standard Title** | Personal effectiveness | **Unit Standard Number** | 242817; 242811; 242816; 15234 |
| **NQF Level** | 4 | **Credits** | 22 |
| **Venue** |  | **Date** |  |
| **Learner Name** |  | **Learner ID Number** |  |
| **Assessor Name** |  | **Assessor Registration Number** |  |

**Assessment Guide**

|  |
| --- |
| **Strengths** |
| The assessment guide is user friendly and easy to manage. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Assessment Process**

|  |
| --- |
| **Strengths** |
| The process is according to the principles of assessment. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Assessment Methods Used**

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| --- |
| **Strengths** |
| The assessment methods address the assessment criteria of the unit standards and is open and fair. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Assessment Instruments Used**

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| --- |
| **Strengths** |
| Easy manageable, cost effective and gives the learner a fair opportunity to proof competence. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Learner's Readiness for Assessment**

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| --- |
| **Strengths** |
| The learners attended the pre-assessment meeting and signed the checklist. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Unit Standard**

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| **Strengths** |
| The unit standards give guidance of what is expected from the learners. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessor**  **Signature** |  | **Date** |  |
| **Moderator**  **Signature** |  | **Date** |  |

**SPECIAL NEED ASSESSMENT**

NAME OF COURSE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE OF COURSE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME OF LEARNER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ID OF LEARNER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME OF ASSESSOR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EXPLANATION OF SPECIAL NEED:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ACTIONS TAKEN BY ASSESSOR TO COMPLETE THE ASSESSMENT:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LEARNER COMPETENT YES / NO

REASONS IF NOT YET COMPETENT:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- | --- |
| **LEARNER SIGNATURE** |  | **DATE** |  |
| **ASSESSOR SIGNATURE** |  | **DATE** |  |
| **MODERATOR SIGNATURE** |  | **DATE** |  |