|  |  |
| --- | --- |
| **Unit standard ID:** 242822242821242829 | **Unit standard title:**Employ a systematic approach to achieving objectivesIdentify responsibilities of a team leader in ensuring that organizational standards are metMonitor the level of service to a range of customers |

**Learner PoE Workbook**

**Achieve Organizational**

 **Performance Standards**

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.

# 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

# ASSESSMENT DETAILS

|  |
| --- |
| **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 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**

# DECLARATION

***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** |  |

#  LEARNER ASSESSMENT CONTRACT

|  |  |
| --- | --- |
| Learner name: |  |
| Assessor name: |  |
| Unit standard assessed: | 242822; 242821; 242829 |
| 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

# PART 1

|  |
| --- |
| Individual **1A. Individual Formative Exercise:**  |
| **Instructions:** For this exercise you will need the following documents as completed in your pre-course exercise:1. The vision, mission and values of **your organisation**

Vision:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Mission:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Values: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. The SWOT of your department

|  |  |
| --- | --- |
| Strengths | Weaknesses |
| Opportunities | Threads |

1. Vision and mission of your department

Vision: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Mission:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Values: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. My division/department’s Key Result Areas are:

KRA1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_KRA2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_KRA3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_KRA4:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_KRA5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Timeframe: 3 hours**  |
| **First attempt** | **Second attempt** | **Third attempt** |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|   |  |  |  |  |  |

|  |
| --- |
| Individual **1B. Individual Formative Exercise:**  |
| **Instructions:**Once you have identified your Key Result Areas, you have to identify specific goals and objectives, which will help you to achieve the department's specific KRA's. Using the table below, list as many goals and objectives as would be required to achieve each KRA.

|  |  |
| --- | --- |
| **KRA’s** | **Departmental Goals and Objectives for each KRA** |
| KRA 1 |  |
| KRA 2 |  |
| KRA 3 |  |
| KRA 4 |  |
| KRA 5 |  |

Draw an organigram of your direct reporting department and then map out which goals and objectives are to be achieved by which teams and individual team members. Keep their level and job titles in mind. You can use different colour pens to organise the information clearly. An example of a organigram with job roles can be found in your learner guide. • Job roles and responsibilities for which teams and individuals were appointedHand this document in with this assessment.  |
| **Timeframe:4 hours**  |
| **First attempt** | **Second attempt** | **Third attempt** |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|   |  |  |  |  |  |

|  |
| --- |
| Group Exercise **1C. Individual Formative Exercise:**  |
| **Instructions:**Prepare to have a performance contracting discussion with an employee. For the discussion, you will need to prepare a performance contract document (use the KRA grid below for this), containing all elements as discussed in module 1 of your Learner Guide. In preparation and during the interview, you need to:* Fill in the Key Result Areas and Performance Objectives on the KRA Grid.
* Obtain agreement and commitment from the employee on the performance objectives
* During the interview, jointly determine and agree on the Performance Indicators and Timeframes

You can also use the following documentation to assist in your preparation: 1. The KRA Grid 2. The Checklist

How will the availability of resources be ensured?

|  |
| --- |
|  |
|  |
|  |
|  |

How regular and in what manner will performance against the plan be monitored?

|  |  |
| --- | --- |
| Monitoring activities | Frequency |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **CHECKLIST**  | **YES/NO** |
| 1. Was the employee informed of the purpose, timeline and contend of the meeting well in advance?
 |  |
| 1. Was the employee put at ease?
 |  |
| 1. Did the manager explain the purpose of the meeting?
 |  |
| 1. Was the Performance Contract put into perspective with the goals of the organisation and the department?
 |  |
| 1. Was the KRA’s explained well in relation to organisation and departmental goals?
 |  |
| 1. Did each KRA’s meet the ‘SMART’ criteria?
 |  |
| 1. Was the inputs of the employee asked with respect to:
	1. Performance/development objectives
	2. Performance indicators
	3. Time frames/monitors
 |  |
| 1. Did the manager ensure that all critical areas of performance was covered by the KRA’s in accordance to the individual’s job description, day to day activities and contribution to overall departmental goals?
 |  |
| 1. Was the employee afforded the opportunity to discuss concerns regarding the Performance Contract?
 |  |
| 1. Were any concerns adequately addressed?
 |  |
| 1. Was the manager well prepared:
	1. Knowledge of previous performance contracts in place
	2. Knowledge and background of Organisation and Departmental objectives
	3. Documentation needed for the meeting
 |  |
| 1. Did the meeting stick to its original purpose?
 |  |
| Signature “Manager” (Learner): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature “Employee” (Peer learner): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

 |
| **Timeframe:5 hours**  |

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

|  |
| --- |
| Group Exercise **1D. Individual Formative Exercise:**  |
| **Instructions:**You will now be required to conduct the Performance Review Interview with the same learner, using the same Performance Contract as in 1C. The employee will also be required to evaluate the manager against the attached checklist and give him/her feedback. * Before you start the interview, clearly describe the steps you took in the preparation to the interview
* Next, conduct the interview
* Describe what documentation needs to be completed

|  |  |
| --- | --- |
| **Checklist: The Performance Review Interview** | **Yes/No** |
| 1. Discussion was opened in friendly and approachable manner
2. The purpose of the meeting was explained: for the two of you to compare the individual’s actual performance in objectives with the agreed-upon performance standard.
3. Emphasise that this discussion is a summary of the performance based on the information you have both been collecting over the past six months / year period.
4. The staff member has been monitoring his/her performance throughout the cycle. Explain that the person’s input is critical and that he/she has a lot to contribute to the discussion.
5. Enhance self-esteem and encourage involvement.
6. For each objective, discuss and agree how actual performance compares to the level agreed to.
7. Recognise the person’s achievements by referring to positive examples you have been collecting throughout the cycle.
8. If performance falls short of the objective, focus on the facts, not the person, to maintain self-esteem and reduce defensiveness.
9. When the staff member has met objectives effectively, ask her to illustrate the success by providing an example of performance. This technique enhances self-esteem and encourages continued or improved performance.
10. Listen and respond with empathy when the person discusses successful performance.
11. When the person has not met objectives, be sure to keep the discussion positive to maintain self-esteem.
12. Was the discussion future-orientated, uncovering causes of the problem and discussing what can be done about it?
13. Did the manager listen to the person’s rationale and respond with empathy to show concern and understanding?
14. Did the manager explain the impact of the employee’s level of performance on the departmental and company goals?
15. Did the manager and employee reach agreement on ratings for objectives?
16. Did the manager focus on performance, not the person?
17. If the person improved during the cycle but did not meet the objectives, did the manager reinforce the improved performance in that related objective?
18. Did the manager handle disagreements about ratings well?
19. Did the manager listen empathically to the person’s concerns, but avoided a debate, focusing on opportunities for continuous improvement?
20. Did the manager and employee agree on developing action plans and follow-up date(s)?
21. Were the employee’s ideas considered to ensure commitment?
22. Was support in the form of coaching etc. discussed with regards to barriers?
23. Were discussions summarised ensuring a common understanding of actions and follow-ups?
24. Was the discussion ended in a positive, sincere way – expressing confidence in the individual and future results?
 |  |
| Signature “Manager” (Learner): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature “Employee” (Peer learner): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

 |
| **Timeframe:3 hours**  |

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

|  |
| --- |
| Group Exercise**1E. Individaul Formative Exercise:**  |
| **Instructions:**Study the following case study and do the exercise below:*You are the foreman of an electrical workshop of a large factory. Your department has always performed exceptionally well and has won numerous awards year after year for continued exceptional performance.* *Your opinion is that you have performed so well because all your team members have been working very hard and continuously meet their targets. You have meticulously set annual targets, measured them and given positive feedback to the team.* *Lately however, one of your employees, an electrician, has had difficulty in meeting his targets. You have heard that he has some problems outside work, but do not have the details. You are however concerned, because if he keeps on at his current performance level, your department would not make it’s target by the end of the year. This would reflect negatively on the whole team, and not only the individual in question.*1. Discuss how you would go about to address this problem.
2. Draw up a performance improvement action plan.
3. Also explain if you will take any additional steps/actions
 |
| **Timeframe:2 hours**  |
| **First attempt** | **Second attempt** | **Third attempt** |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|   |  |  |  |  |  |

# PART 2

|  |
| --- |
| Individual **2A. Individual Formative Exercise:**  |
| **Instructions:**For this exercise you need to reflect on your role and responsibilities as team leader.1. From your Learner guide, make a list of the roles and responsibilities of a team leader.
2. Compare your current job/role description with the list you have made in question 1 of this exercise. List the a) Similarities; b) Differences; c) any other observations that might assist in your current job.
3. Make a list of recommendations you will make to your manager regarding your role.

|  |  |
| --- | --- |
| **Roles and Responsibilities of team leader from Learner Guide:**  | **Your roles and responsibilities from your job description:** |
| **Similarities:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Differences:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Other observations:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  |
| **Recommendations to your manager regarding your roles and responsibilities:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Timeframe: 3 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 **2B. Individual Formative Exercise:**  |
| **Instructions:**In your own words, describe the difference between the following terms: 1. Delegation:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. Responsibility:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. Authority:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. Accountability:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. Give an example of a task you have recently delegated. Also describe how authority, responsibility and accountability were managed.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Timeframe: 1 hour**  |

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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 **2C. Individual Formative Exercise:**  |
| **Instructions:****Watch the DVD of “The power of Teamwork”. Use the insights gained by this DVD, as well as your knowledge from the previous modules on Performance Management to answer the following questions:** 1. Describe the difference between a group and a team.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_1. Review Individual Formative Exercise 1B.
	1. What is the main purpose of your team?

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* 1. Anticipate the potential difficulties in achieving performance objectives.

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| **Timeframe: 4 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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# PART 3

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| Individual **3A. Individual Formative Exercise:**  |
| **Instructions:**1. Explain what you understand by the terminology: Supplier-customer chain.

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| Suppliers:1.2.3.4.5. | Our Team | Customers1.2.3.4.5. |

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| **Timeframe: 2 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 **3B. Individual Formative Exercise:**  |
| **Instructions:****Using the guidelines in your learner guide, describe how you would:**1. Set performance standards for customer service:

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Why would it be important to render good customer service?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_3. What would the consequences of poor customer service be?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_4. How would you measure and record performance against organisational standards?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_5. Describe the process you would follow when giving feedback to your team on performance against customer standards.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_6. How will you go about to ensure corrective action is taken?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Timeframe: 3 hours**  |

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

Section C: Summative Assessments

|  |
| --- |
| Summitive **S1 Summative Exercise:**  |
| **Instructions:** Use the literature and knowledge you gained from this course, to critically evaluate your current performance management system in your department. Consider each step of the performance management process as outlined in your learner guide. Review all documentation your department have. Describe what in your department adheres to the literature, what best practices you have and make recommendations where you think your department falls short in the process. The following should be included in your review:1. Company policy and procedure on Performance Management
2. The process being followed in the setting of individual and team objectives and Performance Contracting
3. Monitoring systems being used
4. The performance review process and interview
5. Performance Improvement and Development Plans
6. Documentation in place to manage the whole process

As supervisor you now have the knowledge and responsibility to improve the process and adhere to the guidelines as set out in the course. Describe what you would do differently and or improve upon during your next Performance Review Cycle. ***The report you hand in for assessment needs to be between two to four typed pages (1,5 line spacing)*** |
| **First attempt** | **Second attempt** | **Third attempt** |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|   |  |  |  |  |  |
| Summitive **S2 Summative Exercise:**  |
| **Instructions:**From the Power of teamwork DVD, list the learning points for you as team leader under the following headings: 1. Setting Goals
2. Strategy
3. Teamwork
4. Leadership

Under the same headings, ‘translate’ these learning points into things you can implement in the workplace.Now draw up an action plan how you will implement them.Summarise your experience of those actions you have been able to implement, difficulties you have experienced as well as successes. ***The report you hand in for assessment needs to be between two to four typed pages (1,5 line spacing)*** |

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

|  |
| --- |
| Summitive **S3 Summative Exercise:**  |
| **Instructions:*** 1. Use the ‘Supplier/Customer engagement plan’ template from your learner guide. Draw up such a plan in your workplace. Involve your work team for this exercise. To be able to complete the template, you need to determine:
* Who your internal and external customers/suppliers are
* What your expectations are from them
* What key deliverables do you expect from them
* How, when and who will engage with them.
1. Now, take one of the suppliers/customers to apply the Deming wheel of continuous improvement on. Describe how you have made use of each step, thereby creating a wheel of continuous improvement.
 |

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

Section D: Assessor Mark Sheets

# ASSESSOR DECLARATION OF LEARNER COMPETENCE

|  |
| --- |
| **UNIT Standard 242822** |
| **Outcomes of each unit standard** | **Assessment criteria** | **Method of assessment (Formative / Summative)** | **Assessed** | **Competent** |
| **Date** | **Initial of assessor** | **YES** | **NYC** |
| SO1: Identify and develop objectives | 1.1. A statement of general intent is written specifying the aim, according to identified needs.1.2. Measurable parameters are specified to meet the need1.3. Involvement of team members is encouraged to refine the objective and measurable parameters | Formative 1A, 1C, 1BSummative 1 |  |  |  |  |
| SO2: Formulate a plan to meet the objective | 2.1. Information is obtained and verified to specify the required tasks to achieve the objectives2.2. Tasks are sequenced according to priority and resources allocated2.3. Time allocations are estimated according to the requirements to achieve objectives.2.4. Criteria for success are established to facilitate monitoring2.5. Contributions from team members are encouraged and decisions are motivated where necessary2.6. Plans are formulated which are clear, visible and understood by all affected parties. | Formative 1C Summative 1 |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| SO3: Implement the plan | 3.1. Team members are delegated tasks according to the plan3.2. Team members are encouraged to complete their tasks using their own control methods3.3. Resources are made available according to the plan3.4. Measuring and checking systems are initiated to enable monitoring for compliance with the plan | Formative 1C, Summative 1 |  |  |  |  |
| SO4: Monitor activities | 4.1. Monitoring activities are initiated to compare actual progress with planned progress4.2. Corrective action is taken, where necessary, to bring actual results in line with planned results | Formative 1D,1C, 1E Summative 1 |  |  |  |  |
| Details of moderation | Name and signature of moderator: | Assessment result confirmed: | YES | NO |
| Moderator comments |

|  |
| --- |
| **UNIT Standard 242821** |
| **Outcomes of each unit standard** | **Assessment criteria** | **Method of assessment****(Formative / Summative)** | **Assessed** | **Competent** |
| **Date** | **Initial of assessor** | **YES** | **NYC** |
| So1: Explain the role of the team leader in an organisation | 1.1. The role of a team leader in an organisation is explained with reference to their job description1.2. The responsibilities of the team leader are explained within the context of a work environment1.3. The concepts of authority, responsibility and accountability are explained with reference to the team leader’s own position in the organisation1.4. The organising of workers in teams is explained in terms of recognised theory and practice | Individual 2A, 2B,2C, 1BSummative 2 |  |  |  |  |
| SO2: Explain the purpose of the team | 2.1. The concept of a team is explained according to accepted theory and practice2.2. The purpose of the team is explained to the team members according to organisational requirements 2.3. The role and expected outputs of each member of the team are identified in relation to the purpose | Formative 2C, 1B Summative 2 |  |  |  |  |
| SO3: Contract with the team members to obtain commitment to achieve organisational standards | 3.1. Tasks, performance plans, targets and standards are discussed and agreed according to organisational requirements3.2. Time allocations for achieving individual and team objectives are agreed through a process of consultation | Formative 1D, 1C, Summative 2 |  |  |  |  |
| SO4: Implement, monitor and evaluate performance against team objectives and organisational standards | 4.1. Agreed plans are implemented according to Standard Operating Procedures4.2. Potential difficulties in achieving the plan are anticipated through reflection and feedback4.3. Team outputs are monitored against agreed targets and time allocations4.4. Variences to required outputs are identified and corrective action is taken where necessary | Formative 1C, 1D, 1E, 1B, 2CSummative 2 |  |  |  |  |
| Details of moderation | Name and signature of moderator: | Assessment result confirmed: | YES | NO |
| Moderator comments |  |

|  |
| --- |
| **UNIT Standard 242829** |
| **Outcomes of each unit standard** | **Assessment criteria** | **Method of assessment (Formative / Summative)** | **Assessed** | **Competent** |
| **Date** | **Initial of assessor** | **YES** | **NYC** |
| So1: Identify internal and external customers, where applicable | 1.1. The supply chain of the organisation is explained with examples1.2. The internal and external customers of the team leader’s work unit is identified, with examples | Formative 3ASummative 3 |  |  |  |  |
| SO2: Explain standards of customer service expected by the organisation | 2.1. Key performance areas of the team, regarding customer service are explained, according to organisational requirements2.2. The importance of maintaining and achieving customer service levels are explained, with examples2.3. The consequences of poor service on the organisation’s objectives are explained, with examples | Formative 3BSummative 3 |  |  |  |  |
| SO3: Measure customer satisfaction on an ongoing basis | 3.1. Key performance areas are measured against organisational standards3.2. Information is recorder regarding performance against accepted standards | Formative 3B Summative 3 |  |  |  |  |
| SO4: Recommend corrective action | 4.1. Feedback on performance is provided to team members, according to Standard Operating Procedures4.2. Corrective action is identified, if required, and recommendations are made to line management | Formative 3BSummative 3Formative 3BSummative 3 |  |  |  |  |
| Details of moderation | Name and signature of moderator: | Assessment result confirmed: | YES | NO |
| Moderator comments |  |

# CCFO Marksheet

|  |  |  |
| --- | --- | --- |
| **Critical Cross-fields** | **Competent/ Not Yet Competent** | **Assessor Comments - detail** |
| Identifying |  |  |
| Organising |  |  |
| Collecting |  |  |
| Communicating |  |  |
| Demonstrating |  |  |
| Contributing |  |  |
| Science |  |  |
| Working |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **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** | 242822; 242821; 242829 |
| **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 discuss 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 PROCEDURE



# 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:** |
|  |
|  |
|  |
|  |
|  |
| **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)** |
|  |
|  |
|  |
|  |
|  |
| **4. Please specify any additional requirements or needs you may have:** |
|  |
|  |
|  |
|  |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| **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

|  |  |
| --- | --- |
| **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

|  |  |
| --- | --- |
| **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** |  | **Unit Standard Number** | **242822; 242821; 242829** |
| **NQF Level** | **4** | **Credits** | **23** |
| **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

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

**Assessment Instruments Used**

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

**Learner's Readiness for Assessment**

|  |
| --- |
| **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. |

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| **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** |  |