|  |  |
| --- | --- |
| Course Name | Mobilise and Manage Performance  NQF 5  SAQA ID: 59201 |
| Module Name | Learner PoE Workbook  Mobilise and Manage Performance |
| Module Code | 11300 |
| Unit Standards | 252029, 252035, 252034 |
| NQF Level | 5 |
| Credits | 24 |

**Learner PoE**

**Workbook**

**Mobilise and Manage Performance**

# Individual Formative Exercise 1A

Aspects of the legal framework governing skills development

**Instructions:**

Explain shortly in your own words the following:

1. The Skills Development Act (5 sentences)
2. The Skills Development Levies Act (5 sentences)
3. The Employment Equity Act (5 sentences)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time-frame: 25 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 1B

National Qualification Framework

**Instructions:**

Explain the importance of the National Qualification Framework in training and development in SA. Pay attention to the following:

1. Origins of the NQF (3 sentences)
2. Intentions of the NQF (3 sentences)
3. Definition (1 sentence)
4. Purpose (3 sentences)
5. Principles (3 sentences)
6. Structure (1 sentence)
7. Who benefits (4 sentences)?
8. Structures and bodies of the NQF (4 sentences)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 20 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 2A

Performance appraisals

**Instructions:**

Part 1: Explain the 11 points on how you will integrate the results from the recent performance appraisal into your training needs analysis according to the information from your manual.

Part 2: Add a completed copy of the appraisal form that you use in your company and explain in a paragraph how it is done in your organisation.

|  |  |  |  |  |  |
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| **Time-Frame: 15 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 2B

Talent Management

**Instructions:**

1. Explain in your own words (four paragraphs) how the talent management strategy can be used in your organisation as a basis for the training needs analysis.
2. Explain in one paragraph what the role of HR department is in building a competent workforce. Pay special attention to the role of the unit manager.
3. Talent management and the role of HR and the unit manager in our organisation.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time-frame: 15 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 2C

Career Development Paths

**Instructions:**

How will you ensure that the development needs of the individual are related to his/her career development path but is also in accordance with the requirements of your organisation by explaining the following:

1. Why is Career Planning important for the employee? (3 sentences)
2. Why is Career Planning important for your organization? (2 sentences)
3. Career management. (5 sentences)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3A

Personal Development Plan

**Instructions:**

Design a Personal Development Plan template that will suit the needs of your organisation.

Pick one employee and insert his/her training needs identified onto the template.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time-frame: 20 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3B

Lifelong Learning

**Instructions:**

Explain how you will ensure that lifelong learning as part of the learning culture will be reflected in the development plan of your organisation with regards to the following aspects:

1. The three characteristics of an organisation
2. The 4 sources can you use to determine the current status in your organisation
3. The 5 elements of a learning culture

|  |  |  |  |  |  |  |
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| **Time-frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3C

Monitor Progress

**Instructions:**

1. Explain how you will use the ATR (Implementation report) to monitor the progress of your development plan.
2. Also name the 7 aspects that should be recorded on the ATR.
3. Now develop an evaluation report for your organisation.

|  |  |  |  |  |  |  |
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| **Time-frame: 45 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3D

Training needs analysis report

**Instructions:**

1. Develop a Training needs analysis report for your organisation.
2. Explain how you will get stakeholder input to reach agreement on the results of training needs of the staff in the unit.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time-frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3E

Learning programmes

**Instructions:**

1. Which information is important when planning training interventions?
2. Name any 5.
3. Also explain the difference between a short course and a skills programme.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 15 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3F

Training needs analysis techniques

**Instructions:**

Explain shortly in your own words the 11 Training needs analysis techniques.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 25 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3G

Learnerships

**Instructions:**

Explain learnerships with particular reference to:

1. What a learnership is (5 sentences)
2. Who may attend it (2 sentences)?
3. Who is involved in the process (3 sentences)?
4. How it is funded (2 sentences)
5. When it can be terminated (4 sentences)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3H

RPL

**Instructions:**

1. Explain in a short paragraph (5 sentences) what Recognition of Prior Learning is.
2. Name the processes of RPL (4 sentences).
3. List all methods that can be used (7 sentences).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 3I

Skills gaps

Instructions:

The training needs analysis will determine the training needs of the staff in your organisation.

Name any six methods that you can use to determine these needs or skills gaps.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 15 minutes** | | | | | | |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4A

Liaison with HR

Instructions:

Discuss the following three points in your liaison with the recruitment/HR dept to ensure that you understand the requirements of the position of first line manager:

1. The 4 steps for the need’s assessment
2. The 6 guidelines to follow
3. The four steps to analyse the job.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4B

Key Performance Area’s

**Instructions:**

1. Explain the job profile and KPA’s in your own words.
2. Then get a copy of the job profile of a first line manager in your organisation.
3. Identify and write down four KPA’s of his/ her job and the KPI’s of each one.
4. Add the Job Profile to your answer sheet.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 45 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4C

Selection of first line manager

**Instructions:**

How can reference checks and background checks play a role in the selection of a first line manager? (Explain in two paragraphs).

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 15 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4D

Interviewing candidates

**Instructions:**

Explain in one paragraph the purpose of interviewing candidates to determine the position of first line manager.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4E

Making a Hiring Decision

**Instructions:**

What are the critical aspects to consider when making a decision to hire a prospective candidate?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 15 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4F

Coaching plan

**Instructions:**

You have to plan your coaching process.

1. Name the steps of the Four Step Model for on-the job coaching.
2. You also have to name the two checklists that you can use in your planning.

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| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |

# Individual Formative Exercise 4G

Recording System

**Instructions:**

Name the six recording documents that you will use and explain the use of each one.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4H

Purpose of the Coaching process

**Instructions**:

Explain the purpose of the coaching process.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4I

Content of coaching process

**Instructions**:

Which eight techniques can you use to explain the content of the coaching process to the employee?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 15 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4J

Activities in coaching process

Instructions:

Explain how you will handle the following activities of the coaching process:

1. Preparing the coaching material and venues – 6 sentences
2. Preparing the learner – 7 sentences
3. Presentation/demonstration – 3 sentences.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4K

Coaching schedule

**Instructions**:

Develop a Coaching Schedule document for your organisation. Make sure the coaching plans are for at least three weeks.

***Scenario:*** You have a new employee in your section that was transferred from another section to you. You have to ensure that the employee feels at home and are informed of the duties, etc of your section so that he/she can perform his/her duties as excellent as possible.

Ensure to add a *corrective actions* column to your schedule.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 30 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 4L

Identifying gaps and resolutions

**Instructions:**

How will you identify gaps and actions to close them in your coaching process?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 30 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 4M

Feedback to the coachee

**Instructions**:

1. Prepare a role-play to provide feedback to a learner regarding her/his participation in the learning activities of this course.
2. The coach was not happy with the coachee’s attitude towards the other course members.
3. One of you will be the coach, the other one the coachee and the third one the observer. Change roles until all three acted as the coach.
4. The observer has to complete the checklist on the next page.
5. The person who acted as the coach must submit the checklist that the observer completed, in his/her PoE.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time frame: 60 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

**Checklist On Feedback To Coachee**

|  |  |
| --- | --- |
| **Name of Coach** |  |
| **Name of Coachee** |  |
| **Name of Observer** |  |
| **Date** |  |

|  |  |  |
| --- | --- | --- |
| **ACTION** | **YES** | **NO** |
| Did the coach welcome the coachee to the meeting and put him/her at ease? |  |  |
| Did the coach explain the reason for the meeting? |  |  |
| Did the coach explain why he/she was not happy with the attitude of the coachee? |  |  |
| Did the coach give the coachee a chance to explain his/her attitude? |  |  |
| Did the coach give specific feedback to the coachee? |  |  |
| Did the coach give positive guidelines to the coachee? |  |  |
| Did the coach give the coachee a chance to ask questions? |  |  |

|  |  |
| --- | --- |
| Signature of coach: |  |
| Signature of observer: |  |
| Signature of facilitator: |  |

# Individual Formative Exercise 5A

Conflict situations

**Instructions**:

Explain how you will respond to conflict situations during the coaching process.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 5B

Negotiation skills

**Instructions**:

Name the 13 guidelines you can follow to enhance your negotiating skills during the coaching process.

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| --- | --- | --- | --- | --- | --- |
| **Time frame: 20 minutes** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 6A

**Instructions:**

For this exercise you will need the following documents as completed in your pre-course exercise:

* The vision, mission and values of your organisation
* The SWOT of your department
* The vision and mission of your department

List the goals and objectives contributing to the achievement of your division’s vision and mission as Key Result Areas.

Please note that KRA's refer to ideal outputs. You should be able to summarise your division’s goals and objectives in four to seven KRA's. Ask yourself the questions:

* "What is the purpose of my division?"
* "What are we supposed to achieve?"
* "How does my department contribute towards the existence of the organisation?"
* “Will achieving this KRA indicate that we are successful as a department?”

My division/department’s Key Result Areas are:

KRA1:

KRA2:

KRA3:

KRA4:

KRA5:

KRA6:

KRA7:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 60 min** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 6B

**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.

**Draw** an organogram 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.

1. Job roles and responsibilities for which teams and individuals were appointed
2. The level of expertise of individual team members
3. The level of competence of individual team members
4. The time availability of team members

|  |  |
| --- | --- |
| **KRA’s** | **Departmental Goals and Objectives for each KRA** |
| KRA 1 |  |
| KRA 2 |  |
| KRA 3 |  |
| KRA 4 |  |
| KRA 5 |  |
| KRA 6 |  |
| KRA 7 |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 60** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 7

**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.

Each member will have a chance to be manager and then employee.

The ‘employee’ will play a dual role by also having to fill in the checklist with regards to the manager and after the conversation to give feedback.

You can also use the following documentation to assist in your preparation:

1. The KRA Grid
2. The Checklist

|  |  |  |  |
| --- | --- | --- | --- |
| **KEY RESULT AREA** | **PERFORMANCE/DEVELOPMENT OBJECTIVE** | **PERFORMANCE INDICATOR** | **TIME FRAME/**  **MONITORING** |
|  |  |  |  |
|  |  |  |  |
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| --- | --- |
| **CHECKLIST** | **YES/NO** |
| 1. Was the learner informed of the purpose, timeline and contend of the meeting well in advance? |  |
| 1. Was the learner 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. Were 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 were 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? |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 60 min** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 8

**Instructions**:

Identify one Performance Monitoring system you will use with respect to an individual KRA.

Discuss and critically evaluate the Monitoring system by answering the following questions:

1. Describe the Monitoring system in detail.
2. What KRA is it linked to?
3. Describe the process that you followed to choose this monitoring system?
4. Describe the advantages and disadvantages of this monitoring system with specific regard to the KRA applicable?
5. Choose two other monitoring systems from your Learner Guide. Critically evaluate each system’s probable usefulness for this specific KRA by describing the advantages, disadvantages, and additional reasons you decided not to use each of these systems.
6. Describe the process you will follow to get the buy-in of the employees being measured on this specific system.
7. Evaluate this monitoring system against your Company/Departmental Policies and Procedures to ensure it is in line. Describe any contradictions or affirmations you found between the monitoring system and any existing material.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Time-frame: 60 min** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# Individual Formative Exercise 9

**Instructions**:

For this exercise you will continue the role play you started in exercise 7.

1. You will now be required to conduct the Performance Review Interview with the same learner, using the same Performance Contract as in 7.
2. Again, each team member will have a chance to act as manager/reviewer, and then as employee/reviewer.
3. The employee will also be required to evaluate the manager against the attached checklist and give him/her feedback.
4. Before you start the interview, clearly describe the steps you took in the preparation to the interview
5. Next, conduct the interview
6. Describe what documentation needs to be completed
7. Include the completed Checklist as well as the completed Employee Performance Review in your PoE.

|  |  |
| --- | --- |
| **Checklist: The Performance Review Interview** | **Yes/No** |
| 1. Discussion was opened in friendly and approachable manner |  |
| 1. The purpose of the meeting was explained: comparing the employee’s performance against agreed-upon standards. |  |
| 1. Discussion focuses on the information you have both been collecting over the past six months / year period. |  |
| 1. 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. |  |
| 1. Enhance self-esteem and encourage involvement from the employee. |  |
| 1. For each objective, discuss and agree how actual performance compares to the level agreed to. |  |
| 1. Recognise the person’s achievements by referring to positive examples you have been collecting throughout the cycle. |  |
| 1. If performance falls short of the objective, focus on the facts, not the person, to maintain self-esteem and reduce defensiveness. |  |
| 1. 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. |  |
| 1. Listen and respond with empathy when the person discusses successful performance. |  |
| 1. When the person has not met objectives, be sure to keep the discussion positive to maintain self-esteem. |  |
| 1. Was the discussion future-orientated, uncovering cause of the problem and discussing what can be done about it? |  |
| 1. Did the manager listen to the person’s rationale and respond with empathy to show concern and understanding? |  |
| 1. Did the manager explain the impact of the employee’s level of performance on the departmental and company goals? |  |
| 1. Did the manager and employee reach agreement on ratings for objectives |  |
| 1. Did the manager focus on performance, not the person? |  |
| 1. If the person improved during the cycle but did not meet the objectives, did the manager reinforce the improved performance in that related objective? |  |
| 1. Did the manager handle disagreements about ratings well? |  |
| 1. Did the manager listen empathically to the person’s concerns but avoided a debate; focussing on opportunities for continuous improvement. |  |
| 1. Did the manager and employee agree on developing action plans and follow-up date(s) |  |
| 1. Were the employee’s ideas considered to ensure commitment? |  |
| 1. Was support in the form of coaching etc discussed with regards to barriers? |  |
| 1. Were discussions summarised ensuring a common understanding of actions and follow-ups? |  |
| 1. Was the discussion ended in a positive, sincere way – expressing confidence in the individual and future results? |  |

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| **Time-frame: 60 min** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Individual Formative Exercise 10

**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 years 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 will not make its 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

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| **Time-frame: 30 min** | | | | | |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
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# Summative Exercise S1

People Development

Use all the information from this course as well as your knowledge, skills, self-insight and background/researched knowledge from your company as well as examples of document to complete the following:

1. You are appointed as the SDF of your organisation. You have to do a Skills Audit to identify skills and training gaps between the available skills and required skills for all the administration employees within the organisation.
2. Draw up an action plan of the steps/methods you are going to take in the skills audit process.
3. Do the Skills Audit for the administrative employees of your organisation? You will need the job descriptions, job profiles, inputs from managers, etc to determine the available skills and required skills of the administrative employees within the organisation. Compile the Skills Matrix for the administrative employees of your organisation.
4. Draw up a Skills Audit Report for management.
5. Compile a Summary Report on the skills audit.
6. Training Needs Analysis.
7. Complete the Training needs analysis for the administrative employees of your organisation. You can use any of the method as discussed in the learning guide. Add the documents that you used for the analysis to your Poe.
8. Now you have to compile a summary of the training needs of the administration employees your organisation.
9. You now know what training must be planned for the administrative employees your organisation. Take any two of those needs and decide which training interventions you are going to use to address these needs. (One must be formal credit –bearing learning programme and one a workplace - based programme).
10. Explain which two interventions you decided on and why.
11. Draw up a training schedule.
12. Compile a logistical checklist for *one* of the training sessions.
13. Compile an Evaluation form that can be used in your organisation after every training intervention.
14. Develop a poster to promote one of your planned training interventions to employees.
15. You have to store all your information. Draw up an Information Management System document that will suit the needs of your organisation.
16. Feedback to all your stakeholders is very important.
17. Identify relevant stakeholders to whom feedback should be given.
18. Compile an example of an Evaluation Report that you will present to them.

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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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# Summative Exercise S2

Use all the information from this course as well as your knowledge, skills, self-insight and background/researched knowledge from your company as well as examples to complete the following:

You are the General manager of your organisation. You are responsible to coach an employee who was recently selected as a front line manager.

1. Get a copy of the Policies and Procedures of appointments in your organisation from your HR department. Set up a meeting with the new first line manager. Develop the Job profile/ description of him/her. Include the Key Performance Areas and KPI’s. Also submit the minutes of your meeting.
2. Decide on how you are going to plan the coaching process and complete the coaching schedule for your coaching process.
3. Draw up the Contract agreement between you and him/her.
4. During the coaching process, you have to have meetings with the coachee to discuss his/her performance, at least once a week. Develop a document (Progress Report) that you can use for these discussions. Then develop a Personal Development plan for him/her to address the areas that needs further attention. You have to submit three Progress reports and three Personal Development plans.
5. You have to follow up on whether the coachee/first line manager is gaining by the coaching process. Develop a feedback form for your organisation. Let your coachee complete it and add your notes on your discussion with him/her after completion of the feedback form.
6. During your discussion with the coachee, the coachee acted defensively and a conflict situation started to develop. What can you do to resolve this?

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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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# Summative Exercise S3

**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 manager 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)

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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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