

NATIONAL CERTIFICATE: GENERIC MANAGEMENT

Skills Programme 4 - Team Management

Practical Assessment

1. Introduction

As part of this training programme, you are required to complete this logbook to record your practical workplace experience. The logbook forms part of your practical assessment and serves as evidence of your applied competence.

You will be assigned a mentor/supervisor who will guide and observe you while you perform workplace tasks. Assessment will be based on your ability to apply workplace skills, follow organisational rules and standards, conduct instructions responsibly, and demonstrate professional behaviour.

Assessment may include written responses and workplace observation.

2. Acknowledgement of receipt

I, _____ (name and surname), ID _____, acknowledge receipt of this logbook and confirm that the on-the-job training process has been explained to me.

I declare that the work contained in this logbook is my own and reflects my actual workplace experience. Any assistance, advice, or external sources used have been acknowledged. I understand that plagiarism is a punishable offence.

Learner

signature: _____

Date: _____

Mentor / supervisor

signature: _____

Name: _____

Section A: Scope and requirements

Most activities may be completed through document analysis, simulation, or written evidence. Some activities must be completed during workplace placement or induction, where the learner is required to supervise, coordinate, or lead a team. Assessment may therefore take place in phases.

Your mentor/supervisor will assess you using the provided evaluation rubric. You must demonstrate applied competence by showing that you can:

- Motivate and strengthen a team
- Apply motivation theories in practice
- Plan, prioritise, and manage time for yourself and your team
- Induct and integrate new team members
- Contract with a team to achieve agreed standards
- Monitor and evaluate team performance
- Delegate authority responsibly
- Maintain accurate team records
- Report performance against organisational standards
- Provide structured feedback and recognition

SKILLS PROGRAMME DETAILS		
US 242819	NQF 4	10 Credits
Unit 1: Motivate and Build a Team		
US 242811	NQF 4	5 Credits
Unit 2: Prioritise time and work for self and team		
US 242812	NQF 3	4 Credits
Unit 3: Induct a member into a team		
US: 242821	NQF 4	6 Credits
Unit 4: Identify responsibilities of a team leader in ensuring that organisational standards are met		
US 242820	NQF 3	4 Credits
Unit 5: Maintain records for a team		

Section B: Mentor/supervisor guidance

When assessing the learner, focus on observable behaviour and practical application rather than theory recall. Evaluate what the learner does in the workplace, how they behave, and how they apply management principles in practice. Look for clear evidence that the learner:

- Applies workplace rules and standards consistently
- Demonstrates understanding through action, not explanation only
- Follows instructions accurately, responsibly, and within agreed timeframes
- Behaves professionally in real or simulated workplace situations
- Shows leadership, accountability, and ethical conduct when dealing with team members

!! Written answers may be supported by workplace observation or verbal confirmation. Where applicable, behavioural evidence must take priority over written explanations.

Competent judgement guidance

*A learner should be marked **Competent (C)** if they:*

- Perform tasks with minimal guidance
- Demonstrate consistent professional behaviour
- Show understanding of roles, responsibilities, safety, and ethics
- Apply delegation, monitoring, and feedback appropriately

*A learner should be marked **Not Yet Competent (NYC)** if they:*

- Require continuous prompting
- Display unsafe or unprofessional behaviour
- Do not demonstrate understanding of basic workplace expectations or leadership duties

***Comments** should clearly indicate:*

- What was observed in practice
- Areas of strength
- Areas requiring improvement (if applicable)

2. How did you differentiate between recognition and corrective feedback?

3. How did you ensure fairness and professionalism?

4. How will you maintain ongoing motivation and performance management?

UNIT 1 (242819) – Rubric

The mentor/supervisor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. After marking, submit additional documentation/videos that the learner created to the Project Coordinator to submit to Moodle as evidence for Criteria 4 and Criteria 5.

Criteria activity number	C	NYC	Comments / Action required
1 Explain importance of motivating a team <ul style="list-style-type: none"> • Applied understanding, not copied Q1 Identify and interpret behavioural indicators within a workplace context. Q2 Links motivation to organisational performance and outcomes at operational level. Q3 Applies one recognised theory appropriately to the given situation. Q4 Identifies realistic organisational consequences aligned to operational impact.			
2 Understanding self and team members <ul style="list-style-type: none"> • Apply leadership judgement Q1 Demonstrates sound judgement in applying leadership approach to experienced team. Q2 Shows understanding of team needs within workplace context. Q3 Suggests practical workplace interventions aligned to team needs. Q4 Demonstrates awareness of leadership risk and impact of misjudgement.			
3 Apply theories of motivation and group dynamics Q1 Diagnoses workplace motivation issues logically. Q2 Recommends practical workplace techniques. Q3 Recognises behavioural and performance consequences. Q4 Identifies measurable improvement indicators.			
4 Implement a plan of action to strengthen a team <ul style="list-style-type: none"> • Evidence to submit: Team Improvement Plan – named <i>Unit 1, Criteria 4</i> <ul style="list-style-type: none"> ○ 3 measurable objectives ○ 4 practical interventions ○ Timeline ○ 3 measurable indicators Q1 Demonstrates ability to analyse root causes using workplace reasoning. Q2 Monitoring approach are structured and measurable.			

5	<p>Feedback & Recognition</p> <ul style="list-style-type: none"> • Evidence to submit: 2x video discussions – named <i>Unit 1, Criteria 5, V1</i> and <i>Unit 1, Criteria 5, V2</i> <ul style="list-style-type: none"> ○ <i>Clear structure (opening, examples, listening, agreement)</i> ○ <i>Professional tone</i> ○ <i>Active listening</i> ○ <i>Differentiation between recognition & corrective feedback</i> <p>Q1 Demonstrates structured and professional communication approach.</p> <p>Q2 Differentiates clearly between recognition and corrective feedback.</p> <p>Q3 Demonstrates fairness, objectivity and ethical conduct.</p> <p>Q4 Shows ongoing performance management awareness.</p>			
---	---	--	--	--

UNIT 2 (242811) - Prioritise Time and Work for Self and Team

This unit enables learners to apply effective planning and time management in the workplace. Learners develop the ability to create and prioritise task lists, manage diaries, delegate tasks appropriately, and monitor progress to ensure work is completed efficiently and aligned with organisational goals.

Criteria 1: Create a task list

Scenario:

You supervise a customer service team. Over the past month, deadlines have been missed, complaints have increased, and team members say they "didn't know what was urgent." You are preparing for the upcoming month, which includes:

- Completion of monthly reports
- Internal audit preparation
- Training new employees
- Resolving customer complaints
- Updating procedures

Tasks are currently managed without a structured master list or daily plan. You are required to develop a structured **Task List System** based on planning principles. Submit your task list, naming your file '**Unit 2, Criteria 1 (Name, Surname)**', to your mentor/supervisor. This document must include:

- Master task list (minimum 10 tasks)
- Allocated responsibilities
- Deadlines
- Clear prioritisation (1 to 3-star ranking: urgent/important)
- Breakdown of one major task into smaller steps

After completing the Task List System, answer:

1. Identify the key steps required to create an effective master task list.

Criteria 2: Prioritise personal and team tasks

Scenario:

You notice that team members react to interruptions instead of following planned priorities. As a result, your production team is experiencing delays:

- Budget reports are submitted late
- Equipment maintenance is inconsistent
- Too many unscheduled meetings are attended
- Urgent client orders are managed at the last minute

You are required to develop a structured **Prioritisation & Scheduling Plan**. Submit your plan, naming your file **'Unit 2, Criteria 2 (Name, Surname)'**, to your mentor/supervisor. This document must include:

- Weekly schedule (Monday–Friday)
- Clear prioritisation (1 to 3-star ranking: urgent/important)
- Re-sequencing of tasks to improve workflow
- At least two examples of waste identified and reduced (e.g. waiting, unnecessary meetings, overproduction)

After completing the Prioritisation & Scheduling Plan, answer:

1. Identify three indicators of poor prioritisation.

2. How do lack of scheduling and unclear objectives affect time management and team performance?

3. Briefly explain why you scheduled certain tasks first and how your plan improves workflow and performance.

Criteria 3: Use and Maintain a Diary

Scenario:

You are a junior manager. At the end of each day, you feel busy but unproductive because your time is frequently disrupted by:

- Drop-in visitors
- Telephone interruptions
- Crisis situations
- Unplanned meetings

You are required to develop a structured **Diary Plan** to improve your time management. Submit your plan, naming your file '**Unit 2, Criteria 3 (Name, Surname)**', to your mentor/supervisor. This document must include:

- A 5-day diary layout
- Clear distinction between private and public time
- 1 to 3-star ranking appointments
- Buffer time between meetings

After completing the Diary Plan, answer:

1. How can keeping a time log reveal patterns of time wastage?

2. How does effective diary management contribute to current performance and long-term organisational success?

UNIT 2 (242811) – Rubric

The mentor/supervisor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. After marking, submit additional documentation/videos that the learner created to the Project Coordinator to submit to Moodle as evidence for Criteria 1, Criteria 2, Criteria 3, and Criteria 4.

Criteria activity number	C	NYC	Comments / Action required
<p>1</p> <p>Create a task list</p> <ul style="list-style-type: none"> • Evidence to submit: Task List System – named <i>Unit 2, Criteria 1</i> <ul style="list-style-type: none"> ○ <i>Master list (min 10 tasks)</i> ○ <i>Responsibilities</i> ○ <i>Deadlines</i> ○ <i>Priority ranking</i> ○ <i>Breakdown of major task</i> <p>Q1 Demonstrates logical planning process.</p> <p>Q2 Shows understanding of control through task breakdown.</p> <p>Q3 Links task list to accountability and monitoring.</p> <p>Q4 Demonstrates sound prioritisation reasoning.</p>			
<p>2</p> <p>Prioritise personal and team tasks</p> <ul style="list-style-type: none"> • Evidence to submit: Prioritisation & Scheduling Plan – named <i>Unit 2, Criteria 2</i> <ul style="list-style-type: none"> ○ <i>Weekly plan</i> ○ <i>Star ranking</i> ○ <i>Workflow sequencing</i> ○ <i>Waste reduction examples</i> <p>Q1 Identifies operational signs of poor prioritisation.</p> <p>Q2 Links unclear scheduling to performance impact.</p> <p>Q3 Provides logical sequencing explanation.</p>			
<p>3</p> <p>Use and maintain a diary</p> <ul style="list-style-type: none"> • Evidence to submit: Diary Plan – named <i>Unit 2, Criteria 3</i> <ul style="list-style-type: none"> ○ <i>5-day layout</i> ○ <i>Private/public time distinction</i> ○ <i>Buffer time</i> <p>Q1 Recognises patterns of time misuse</p> <p>Q2 Links diary management to organisational efficiency.</p>			

4	<p>Personal and team task plan</p> <ul style="list-style-type: none"> • Evidence to submit: Delegation & Monitoring Plan – named <i>Unit 2, Criteria 4</i> <ul style="list-style-type: none"> ○ <i>Clear delegated task</i> ○ <i>Deadline</i> ○ <i>Authority level</i> ○ <i>Monitoring checkpoints</i> ○ <i>Accountability method</i> <p>Q1 Demonstrates understanding of accountability through measurable standards.</p>			
----------	---	--	--	--

UNIT 3 (242812) – Induct a New Member into a Team

This unit enables learners to induct and integrate a new team member in the workplace. Learners prepare the team, introduce the new member, explain performance expectations, and create awareness of growth opportunities.

Criteria 1: Prepare to Receive a New Team Member

Scenario:

You are a junior supervisor. A new employee will join the team next week. In the past, new members were unclear about their roles and not properly introduced. Some team members are unsure how the new employee will affect workload.

You must prepare the team before the new member arrives. Develop a one-page **New Member Preparation Plan**. Submit your plan, naming your file '**Unit 3, Criteria 1 (Name, Surname)**', to your mentor/supervisor. This document must include:

- How the team will be informed before arrival
- Clarification of roles and responsibilities
- How the new member will be welcomed
- How basic motivation and support will be provided

Before developing the New Member Preparation Plan, answer:

1. How can unclear roles and poor induction affect team performance?

2. Apply one motivation principle to explain how you will prepare the team.

3. How can recognition reduce resistance to change?

Criteria 2: Introduce the New Member



Scenario:

You are conducting the first team meeting with the new employee present. You must introduce the new member, explain expectations, and reinforce team goals. The team includes:

- A high achiever
- A collaborative member
- An independent worker
- A member resistant to change

You are required to develop a **Meeting Plan**. Submit your plan, naming your file '**Unit 3, Criteria 2 (Name, Surname)**', to your mentor/supervisor. This document must include:

- Objectives
- Agenda
- Key messages
- Feedback methods
- Performance expectations
- Behavioural expectations

You must also submit a structured **Introduction Meeting video** (maximum 10 minutes), naming your file '**Unit 3, Criteria 2 (Name, Surname)**', to your mentor/supervisor. In the introduction meeting video, demonstrate:

- Clear explanation of team goals
- Recognition of individual differences
- Encouragement of participation
- Link between team and organisational goals

After completing both, answer:

1. How did you demonstrate inclusion and recognition?

2. How does a clear introduction support team performance?

Criteria 3: Explain how Team Performance is Monitored

Scenario:

Your team has missed two deadlines. Complaints have increased. Some members blame workload; others blame communication.

Develop a brief **Team Performance Monitoring Plan**. Submit your plan, naming your file '**Unit 3, Criteria 3 (Name, Surname)**', to your mentor/supervisor. This document must include:

- Key performance indicators
- How often feedback will be given
- Simple monitoring tools
- Recognition methods

After completing the Team Performance Monitoring Plan, answer:

1. Identify three signs of performance problems.

2. How can unclear objectives or lack of feedback affect performance?

3. How does regular feedback improve performance?

Criteria 4: Create Awareness of Career Opportunities

Scenario:

Two experienced team members feel their work is repetitive. Productivity has decreased and absenteeism is increasing.

Develop a **Growth and Job Enrichment Plan**. Submit your plan, naming your file '**Unit 3, Criteria 4 (Name, Surname)**', to your mentor/supervisor. This document must include:

- Increased responsibilities
- How growth opportunities will be communicated
- Measurable indicators of improvement

After completing the Growth and Job Enrichment Plan, answer:

1. What risks arise if growth opportunities are ignored?

2. How do needs such as achievement or affiliation influence motivation?

3. How can empowerment improve engagement?

UNIT 3 (242812) – Rubric

The mentor/supervisor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. After marking, submit additional documentation/videos that the learner created to the Project Coordinator to submit to Moodle as evidence for Criteria 1, Criteria 2 (2 items to submit), Criteria 3, and Criteria 4.

Criteria activity number	C	NYC	Comments / Action required
<p>1</p> <p>Prepare to receive a new member</p> <ul style="list-style-type: none"> • Evidence to submit: New Member Preparation Plan – named <i>Unit 3, Criteria 1</i> <ul style="list-style-type: none"> ○ <i>Team informed before arrival</i> ○ <i>Clarified roles and responsibilities</i> ○ <i>Structured welcome approach</i> ○ <i>Basic motivation/support measures</i> <p>Q1 Recognises performance risks of poor induction.</p> <p>Q2 Applies motivation principle appropriately.</p> <p>Q3 Demonstrates understanding of change management dynamics.</p>			
<p>2</p> <p>Introduce the new member to the team</p> <ul style="list-style-type: none"> • Evidence to submit: Meeting Plan – named <i>Unit 3, Criteria 2</i> <ul style="list-style-type: none"> ○ <i>Clear objectives</i> ○ <i>Team inclusion</i> ○ <i>Recognition of differences</i> • Evidence to submit: Introduction Meeting video – named <i>Unit 3, Criteria 2 (Role play with student/s)</i> <ul style="list-style-type: none"> ○ <i>Inclusive communication and body language</i> ○ <i>Assess observable behaviour - not scripted reading</i> ○ <i>Clear team purpose and goals</i> ○ <i>Proper introduction of new member</i> ○ <i>Encourages participation (not one-way)</i> ○ <i>Links team goals to organisational goals</i> <p>Q1 Demonstrates inclusive communication behaviour.</p> <p>Q2 Links clarity of introduction to team effectiveness.</p>			

3	<p>Monitoring team performance</p> <ul style="list-style-type: none"> • Evidence to submit: Team Performance Monitoring Plan – named <i>Unit 3, Criteria 3</i> <ul style="list-style-type: none"> ○ <i>KPIs</i> ○ <i>Feedback frequency</i> ○ <i>Tools</i> ○ <i>Recognition</i> <p>Q1 Identifies observable performance indicators.</p> <p>Q2 Links unclear objectives to output impact.</p> <p>Q3 Demonstrates understanding of feedback cycle.</p>			
4	<p>Create awareness of career opportunities in an organisation</p> <ul style="list-style-type: none"> • Evidence to submit: Growth and Job Enrichment Plan – named <i>Unit 3, Criteria 4</i> <ul style="list-style-type: none"> ○ <i>Increased responsibilities</i> ○ <i>Communication plan</i> ○ <i>Measurable outcomes</i> <p>Q1 Identifies retention and engagement risks.</p> <p>Q2 Demonstrates understanding of human motivation factors.</p> <p>Q3 Links empowerment to engagement outcomes.</p>			

Criteria 2: Explain the Purpose of the Team

Scenario:

Your team is confused about priorities. Some members focus only on daily tasks without understanding how their work supports organisational goals. Others are unclear about performance expectations.

- 1. Identify the primary purpose of your team.

- 2. How does an unclear purpose affect performance and morale?

- 3. Apply SMART goal-setting principles to improve clarity.

- 4. How does aligning team purpose with organisational standards improve results?

Criteria 4: Implement, Monitor and Evaluate Performance Against Team Objectives and Organisational Standards

Scenario:

After contracting, performance improves initially but then stabilises. Some members exceed targets, while others consistently underperform. There are limited feedback and inconsistent monitoring.

You are required to develop a **Performance Monitoring Plan**. Submit your plan, naming your file 'Unit 4, Criteria 4 (Name, Surname)', to your mentor/supervisor. This document must include:

- Measurable indicators
- Monitoring frequency
- Feedback process
- Corrective actions
- Reference to organisational standards or KPIs
- Documentation method

After completing the Performance Monitoring Plan, answer:

1. How does lack of monitoring affect organisational standards?

2. How do evaluation and feedback improve team performance?

UNIT 4 (242821) – Rubric

The mentor/supervisor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. After marking, submit additional documentation/videos that the learner created to the Project Coordinator to submit to Moodle as evidence for Criteria 3 (2 items to submit), and Criteria 4.

Criteria activity number	C	NYC	Comments / Action required
1 Role of team leader in organisation Q1 Demonstrates understanding of leadership accountability. Q2 Clearly distinguishes authority levels. Q3 Demonstrates balance between task and people leadership. Q4 Links leadership to measurable organisational results.			
2 Purpose of a team Q1 Identifies team purpose beyond daily tasks. Q2 Links unclear purpose to morale/performance impact. Q3 Demonstrates structured goal-setting awareness. Q4 Aligns team objectives with organisational standards.			
3 Contract with team members to obtain commitment <ul style="list-style-type: none"> • Evidence to submit: Team Contract – named <i>Unit 4, Criteria 3</i> <ul style="list-style-type: none"> ○ <i>Agreed standards clearly stated</i> ○ <i>Roles and responsibilities defined</i> ○ <i>Delegated authority included</i> ○ <i>Monitoring and accountability measures</i> ○ <i>Consequences and recognition included</i> • Evidence to submit: Team Contract – named <i>Unit 4, Criteria 3 (Role play with student/s – Max 10 minutes)</i> <ul style="list-style-type: none"> ○ <i>Clear explanation of standards</i> ○ <i>Team involvement in agreement</i> ○ <i>Confirmation of commitment</i> ○ <i>Professional facilitation</i> ○ <i>Measurable targets discussed</i> Q1 Demonstrates how agreement strengthens accountability.			

4	<p>Performance against team objectives and organisational standards</p> <ul style="list-style-type: none"> • Evidence to submit: Performance Monitoring Plan – named <i>Unit 4, Criteria 4</i> <ul style="list-style-type: none"> ○ <i>Clear measurable indicators</i> ○ <i>Monitoring frequency defined</i> ○ <i>Feedback process structured</i> ○ <i>Corrective actions outlined</i> ○ <i>Reference to organisational standards</i> ○ <i>Documentation method included</i> <p>Q1 Identifies impact of weak monitoring on standards.</p> <p>Q2 Links evaluation and feedback to improvement cycle.</p>			
----------	--	--	--	--

This unit enables learners to maintain accurate team records and report information in line with organisational requirements. Learners identify, organise, record, and report team data to support accountability, compliance, and performance management.

Criteria 1: Explain Why Organisations Record and Keep Information

Scenario:

You are a team leader in a service department. Recently:

- A client dispute arose due to missing deadline records
- Budget overruns occurred because expenses were not recorded
- A team member denied receiving feedback
- Management requested data that could not be provided

Senior management has instructed all team leaders to review record-keeping practices.

1. Identify four reasons why organisations record and retain information.

2. What risks arise when accurate records are not kept?

Criteria 2: Identify and Describe the Type of Records Used to Manage the Team

Scenario:

Your team has 10 members. You are responsible for:

- Attendance
- Performance tracking
- Budget control
- Training records
- Client documentation

Records are currently stored inconsistently. You are required develop a one-page **Team Records Register**. Submit your register, naming your file '**Unit 5, Criteria 2 (Name, Surname)**', to your mentor/supervisor. This document must include:

- Type of record
- Purpose
- Responsible person
- Storage method
- Retention guideline

Before developing the register, answer:

1. Identify the main categories of records needed to manage a team.

2. How do different types of records support planning and control?

3. How does organised record-keeping reduce risk and improve efficiency?

UNIT 5 (242820) – Rubric

The mentor/supervisor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. After marking, submit additional documentation/videos that the learner created to the Project Coordinator to submit to Moodle as evidence for Criteria 3 (2 items to submit), and Criteria 4.

Criteria activity number	C	NYC	Comments / Action required
<p>1</p> <p>Why organisations record and keep information</p> <p>Q1 Demonstrates understanding of organisational record purposes.</p> <p>Q2 Identifies operational and compliance risks.</p> <p>Q3 Links records to accountability and standards.</p> <p>Q4 Shows awareness of compliance and decision-making function.</p>			
<p>2</p> <p>Type of records used to manage the team</p> <ul style="list-style-type: none"> • Evidence to submit: Team Records Register – named <i>Unit 5, Criteria 2</i> <ul style="list-style-type: none"> ○ <i>Clear record categories</i> ○ <i>Purpose defined</i> ○ <i>Responsible person allocated</i> ○ <i>Storage method stated</i> ○ <i>Retention guideline included</i> ○ <i>Logical and organised format</i> <p>Q1 Identifies relevant management record categories.</p> <p>Q2 Links records to planning and control processes.</p> <p>Q3 Demonstrates efficiency and risk reduction reasoning.</p>			
<p>3</p> <p>Team performance against team output</p> <ul style="list-style-type: none"> • Evidence to submit: Team Contract – named <i>Unit 5, Criteria 3</i> <ul style="list-style-type: none"> ○ <i>Target vs actual comparison clear</i> ○ <i>Performance gaps identified</i> ○ <i>Logical causes discussed</i> ○ <i>Corrective actions recommended</i> ○ <i>Professional management format</i> • Evidence to submit: Team Contract – named <i>Unit 5, Criteria 3 (Role play with student/s – Max 10 minutes)</i> <ul style="list-style-type: none"> ○ <i>Accurate presentation of data</i> ○ <i>Clear identification of gaps</i> ○ <i>Logical corrective suggestions</i> ○ <i>Professional communication</i> <p>Q1 Identifies performance gaps logically.</p> <p>Q2 Suggests operational causes.</p> <p>Q3 Links reporting to corrective action.</p>			

Section C: Assessment conclusion

General comments of mentor/supervisor:		
Mentor/supervisor name:	<input type="checkbox"/> Learner is Competent	<input type="checkbox"/> Learner is Not Yet Competent
Learner declaration		
<p>I, _____, declare that I am satisfied / unsatisfied (cross out the appropriate option) with the feedback provided by the mentor/supervisor, as it was relevant, sufficient, and constructive. I accept the assessment decision and have no further questions regarding this assessment instrument.</p> <p>Additional learner comments:</p>		
Date:	Mentor/supervisor signature:	Learner signature: