SA CAMPUS

Skills Programme: Performance Management (NQF 4)

Practical assessment

1. Introduction

As part of this training programme, you are required to complete a logbook that records your practical, on-the-job training and workplace exposure. This logbook forms part of your practical assessment and provides evidence of your participation and performance.

You will be assigned to a mentor/ supervisor who will guide and observe you while you perform workplace tasks. Assessment is based on your behaviour, participation, and ability to apply workplace skills.

You will be assessed using a combination of written responses and workplace observation. Your mentor or assessor will look for clear examples that show how you apply workplace rules, follow instructions, understand responsibilities, and behave professionally in a real workplace setting.

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 hereby declare that the work contained in this logbook is my own and reflects my actual workplace experience. Where assistance, advice, or resource material from a workbook, policy documents, the internet, or any other sources was used, this has been acknowledged. I understand that plagiarism is a punishable offence and constitutes the theft of intellectual property.

Learner signature: _____   Date: _____

Mentor / supervisor name: _____

Mentor / supervisor signature: _____

Section A: Scope and requirements

Some activities may be completed through document analysis, simulation, or written evidence before placement. Other activities must be completed after placement and induction. Assessment may therefore take place in phases.

Your **supervisor / mentor** will assess you using the evaluation rubric provided. The practical assessment covers the following workplace essential skills:

- Identify and develop objectives.
- Formulate a plan to meet the objective.
- Implement the plan.
- Monitor activities.
- Explain the concept of ethics in relation to the 'moral compass'.
- Describe the role of a code of conduct in a work environment according to ethical principles.
- Uphold the code of conduct within the work team.
- Identify and explain the core business of an organisation.
- Explain the types of work done within the various core activities of an organisation.
- Explain the role of a selected work unit in an organisation in relation to the core business.
- Identify and explain the difference between the line and support functions within a selected organisation.
- Set performance goals and measures.
- Formulate development plans.
- Monitor and evaluate performance.

Section B: Company Representative (to be completed before assessment)

Name and Surname:	Date:
ID Number:	
Company:	Signature:
Company number/email:	

Section C: Mentor/supervisor guidance

When marking the learner, focus on observable behaviour and practical application, not theory recall. The mentor should look for evidence that the learner:

- Apply workplace rules consistently, not once-off
- Demonstrates understanding through action, not explanation only
- Follows instructions accurately and responsibly
- Behaves professionally in real or simulated situations

‼️ Written answers may be supported by workplace observation or verbal confirmation. Behavioural evidence should take priority where applicable.

Competent judgement guidance

A learner should be marked Competent if they:
- Perform the task with minimal guidance
- Show appropriate behaviour throughout
- Demonstrate basic understanding of roles, responsibilities, safety, and ethics

A learner should be marked Not Yet Competent if they:
- Require continuous prompting
- Display unsafe, unprofessional, or inappropriate behaviour
- Do not understand basic workplace expectations

Comments should clearly indicate:
- What was observed
- What needs improvement (if applicable)

Unit Standard 242822 - Employ a systematic approach to achieving objectives

This unit standard teaches you how to identify performance problems, set clear and measurable objectives, develop practical action plans, and implement them effectively within a team. It also shows you how to monitor progress, compare results against targets, and take corrective action to ensure organisational goals are achieved.

Criteria 1: Identify and Develop Objectives

Scenario:

You are the Team Leader at BrightWave Services, a customer support company. An internal review identified the following:

- Customer complaints increased by 22% over the last 6 months.

- Customer queries are currently answered within 48 hours.

- Company policy requires responses within 24 hours.

- Staff members report that they are unclear about their performance expectations.

- No monthly performance targets are currently set.

- Team meetings are irregular.

- The department consists of 6 customer support staff members.

- Management requires performance to improve within the next 3 months.

Top management has instructed you to develop clear objectives to improve performance in your department.

1. Identify FOUR needs that must be addressed in the department.

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2. Formulate ONE statement of general intent for the department.

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3. Develop THREE objectives to address the identified needs.

Objective	Measurable parameter	Time frame	Responsible person

Criteria 2: Formulate a Plan to Meet the Objective

Scenario:

You are the Team Leader at BrightWave Services. The following objective has been agreed:

Objective:
Respond to all customer queries within 24 hours in order to reduce customer complaints.

Current situation:

- The department receives approximately 60 customer queries per day.

- Only 40% of queries are currently responded to within 24 hours.

- Customer complaints increased by 22%, mostly due to slow responses.

- Queries are checked only twice per day.

- There is no tracking system to monitor response times.

- No staff member is assigned to monitor incoming queries.

- There are 6 customer support staff members.

- The department has computers, email, and a shared drive.

- No additional budget is available.

- Progress must be reviewed weekly by management.

- The target must be achieved within three months.

You must now develop a practical action plan to achieve this objective.

1. Identify FOUR key pieces of information from the scenario that will affect your planning.

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2. List FIVE tasks that must be included in your action plan to achieve the objective.

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3. Complete the table below for the tasks you listed:

Task	Responsible person	Resources needed	Time frame

Criteria 3: Implement the Plan

Scenario:

You are the Team Leader at BrightTech Solutions, a small IT support company with four technicians. The company wants to reduce the average response time to customer emails from 48 hours to 24 hours within one month. An action plan has already been approved and communicated to the team.

The plan includes the following tasks:

- All support emails must be checked every two hours during working hours;

- One technician per day is assigned as Email Monitor to oversee incoming emails;

- The Email Monitor allocates emails to technicians;

- Each technician must respond to allocated emails within 24 hours.

Monitoring and reporting measures:

- A shared tracking spreadsheet records the time each email is received and responded to;

- The Team Leader reviews the tracking spreadsheet every afternoon;

- A weekly compliance report is submitted to management every Friday;

- If response times fall below the 24-hour target, the Team Leader meets with the technician concerned and provides guidance.

Authority levels:

- Technicians may respond directly to customers;

- Technicians may not approve refunds or change service agreements without Team Leader approval;

- The Email Monitor may allocate emails but may not change deadlines;

- The Team Leader retains overall accountability for meeting the response-time target.

Available resources:

- Computers;

- Company email;

- The shared drive;

- The tracking spreadsheet.

Technicians may use their preferred work methods, such as task lists or calendar reminders, as long as the 24-hour response time is achieved.

1. Describe how tasks and authority are delegated in this plan.

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2. Identify the resources available to the team and explain how these resources support implementation of the plan.

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3. Identify the monitoring measures included in the plan and explain how they ensure accountability.

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Criteria 4: Monitor Activities

Scenario:

You are the Team Leader in the Customer Support Department at BrightWave Services. Six weeks ago, an action plan was introduced to ensure that all customer queries are responded to within 24 hours. The company target is 100% compliance within 24 hours. Monitoring information shows:

- The department receives approximately 60 queries per day.

- Week 1 compliance rate: 55%.

- Week 3 compliance rate: 70%.

- Week 6 compliance rate: 82%.

- Two staff members have repeated overdue responses.

- A tracking spreadsheet is updated daily.

- A weekly compliance report is reviewed every Friday.

- Some customers are still complaining about delayed responses.

Top management has instructed you to monitor progress and take corrective action where necessary.

1. Compare the department's current performance with the company target.

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2. Identify TWO monitoring activities that are currently taking place.

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3. Identify TWO areas where corrective action is required and state what action you would take in each case.

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US 242822 - Rubric

The mentor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. Bullet points serve as guidelines for what to consider when marking each criterion.

Criteria activity number		Competent	Not Yet Competent	Comments / Action required
1	**Identify and develop objectives.** • **Q1:** Identifies four clear performance gaps, demonstrating understanding of the department's needs. • **Q2:** Provides one clear, broad statement of general intent aligned to improving departmental performance. • **Q3:** Develops three specific objectives, each including a measurable parameter, time frame, and responsible person, aligned to the scenario and 3-month requirement.			

2	**Formulate a plan to meet the objective.** • **Q1**: Identifies four relevant planning factors directly from the scenario (e.g., workload, current performance gap, resource constraints, time frame, reporting requirements). • **Q2**: Lists five practical tasks clearly aligned to achieving the 24-hour response objective and addressing the identified gaps. • **Q3**: Completes the table logically, assigning each task a responsible person, appropriate resources (within existing constraints), and a realistic time frame aligned to the three-month target.			
3	**Implement the plan.** • **Q1:** Explains how tasks are allocated (Email Monitor, technicians) and clearly outlines authority limits for each role, including the Team Leader. • **Q2:** Identifies the listed resources and explains how they support email allocation, tracking, communication and time management. • **Q3:** Identifies the monitoring measures (tracking sheet, reviews, reports, corrective meetings) and explains how they ensure oversight and accountability for the 24-hour target.			

| 4 | **Monitor activities.**

• Q1: Clearly compares the latest compliance rate (82%) with the 100% target and recognises that, although improvement has occurred, the target has not yet been achieved.
• Q2: Correctly identifies two monitoring activities from the scenario (e.g., daily tracking spreadsheet updates, weekly compliance report reviews) without introducing information not provided.
• Q3: Identifies two valid problem areas (e.g., repeated overdue responses by specific staff, ongoing customer complaints) and proposes appropriate corrective actions that are practical and linked to improving performance. | | | |

Date	Learner signature	Date	Mentor/supervisor signature

Unit Standard 242815 - Apply the organisation's code of conduct in a work environment

This unit standard focuses on helping junior managers understand personal ethics, the concept of the moral compass, and how ethical principles guide workplace behaviour through a code of conduct. It equips learners to interpret, apply and uphold organisational ethical standards within their teams, align behaviour with constitutional values, and take appropriate action when the code is violated.

Criteria 1: Explain the Concept of Ethics in Relation to the 'Moral Compass'

Scenario:

You are a Team Leader at Ubuntu Financial Services. The organisation promotes the following values:

- Honesty
- Accountability
- Respect
- Fairness
- Protection of client confidentiality

Company policy states:

- Employees must report dishonest behaviour.
- Employees must treat all clients equally.
- Employees must not use company time for personal benefit.
- All decisions must respect the dignity of others.

Recently, the following incidents occurred:

- Thabo reported a colleague who was changing client information to increase commission.
- Lerato used company time to run her personal business.
- Ahmed refused to process a client's application because he disagreed with the client's lifestyle.
- Maria stayed after hours to correct an error she made.
- Two team members argued: one said, "If it's not illegal, it's fine." The other said, "Even if it's legal, it can still be wrong."

1. Explain what is meant by ethics in a workplace environment.

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2. Explain what is meant by a moral compass and show how it is demonstrated in ONE incident from the scenario.

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3. Identify TWO examples of ethical behaviour and TWO examples of unethical behaviour from the scenario. Briefly explain your choices.

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4. Using the argument between the two team members, explain why something can be legal but still unethical.

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Criteria 2: Describe the Role of a Code of Conduct in a Work Environment According to Ethical Principles

You are a Team Leader at Ubuntu Financial Services. The organisation has recently revised its Code of Conduct. The Code includes the following principles:

- Employees must treat clients and colleagues with dignity and respect.

- Discrimination is prohibited.

- Client information must remain confidential.

- Employees must not accept gifts that influence decisions.

- Dishonest reporting is misconduct.

- All employees must comply with the Constitution and company policies.

- Managers must lead by example.

After the Code was introduced:

- Some employees said it is "just paperwork."

- A senior manager ignored a harassment complaint.

- A new employee said she is unsure how the Code applies to daily decisions.

- A team member asked whether the Code overrides personal beliefs.

- HR confirmed that failure to follow the Code may lead to disciplinary action.

1. Describe the purpose and role of the Code of Conduct in this organisation.

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2. Using an example from the scenario, show how the Code of Conduct guides workplace behaviour and promotes ethical principles.

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3. Explain why the Code of Conduct must be followed even if an employee's personal beliefs differ, and state what may happen if it is not followed.

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Criteria 3: Uphold the Code of Conduct within the Work Team

Scenario:

You are a Team Leader at Ubuntu Financial Services. The organisation's Code of Conduct states:

- Employees must treat others with dignity and respect.
- Discrimination is prohibited.
- Harassment may lead to disciplinary action.
- Confidential information must not be shared.
- Misconduct must be reported according to Standard Operating Procedures (SOPs).
- All deviations from the Code must be documented and investigated.

The company SOP for misconduct requires:

1. The incident must be reported to the Team Leader.
2. The Team Leader must document the incident.
3. Serious matters must be escalated to HR.
4. A disciplinary process may follow.

Recent incidents in your team:

- Sipho refused to assist a client due to his personal religious beliefs.
- Nomsa shared confidential client information with a friend outside the company.
- A junior employee witnessed falsification of documents but did not report it.
- A senior staff member made repeated inappropriate jokes.
- Thandi reported a breach of confidentiality even though it involved her close colleague.

1. Identify TWO deviations from the Code of Conduct in the scenario and state what action must be taken according to the SOP in each case.

2. If a serious incident such as falsification of documents is discovered, state the full process that must be followed to ensure the Code is upheld.

3. Using the scenario, show how reporting misconduct helps to uphold the Code of Conduct within the team.

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US 242815 - Rubric

The mentor will assess the learner as _Competent_ or _Not Yet Competent_ based on consistent evidence. Bullet points serve as guidelines for what to consider when marking each criterion.

Criteria activity number		Competent	Not Yet Competent	Comments / Action required
1	**Explain the concept of ethics in relation to the 'moral compass'.** • **Q1**: Provides a clear explanation of ethics in a workplace environment, describing the principles and guidelines that influence decision-making and behaviour at work. • **Q2**: Explains a moral compass and links it to one relevant incident from the scenario. • **Q3**: Identifies two ethical and two unethical behaviours and briefly justifies each with reference to company values or policy.			
2	**Describe the role of a code of conduct in a work environment according to ethical principles.** • **Q1:** Explains the purpose of the Code of Conduct. • **Q2:** Uses a relevant example from the scenario to show how the Code directs behaviour			

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	and reinforces ethical principles. • **Q3:** Provides a clear explanation demonstrating understanding of the expectations set by the Code of Conduct and the implications of not adhering to workplace requirements.			
3	**Uphold the code of conduct within the work team.** • **Q1:** Identifies any TWO valid deviations and correctly states the required SOP actions. • **Q2:** Outlines the full SOP sequence. • **Q3:** Uses a relevant example from the scenario to demonstrate how reporting misconduct supports adherence to workplace standards and reinforces accountability within the team.			

Date	Learner signature	Date	Mentor/supervisor signature

Unit Standard 242814 - Identify and explain the core and support functions of an organisation

Unit Standard 242814 teaches you how an organisation operates by identifying its core business, understanding the different core activities, and explaining how these activities work together to create value. It also helps you understand the role of individual work units and the difference between line and support functions in contributing to organisational success.

Criteria 1: Identify and Explain the Core Business of an Organisation

Scenario:

You work at FreshBite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores.

The company operates as follows:

- Marketing gathers information about customer needs.

- Product Development designs new meal recipes.

- Sales secures contracts with supermarkets.

- Production prepares and packages the meals.

- Quality Control checks hygiene and food safety standards.

- Distribution delivers products to retailers.

- Accounting invoices customers and collects payment.

- Raw materials are purchased from suppliers.

FreshBite's mission is: "To produce high-quality, affordable ready-to-eat meals that meet customer needs while maintaining food safety and efficiency."

The process flow is:

Marketing → Product Development → Sales → Production → Quality Control → Distribution → Accounting.

1. Identify the core business of FreshBite Foods and explain what is meant by "core business" using this organisation as an example.

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2. Using the process flow provided, describe how THREE core activities are related to each other and why coordination between them is important.

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3. Explain how FreshBite creates value by transforming inputs into outputs, and give ONE example of a high value-adding activity in the organisation.

Criteria 2: Explain the Types of Work Done within the Various Core Activities of an Organisation

Scenario:

You work at FreshBite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores.

The company's core activities include:

- Marketing – Researches customer preferences and market trends;
- Product development – Designs new meal recipes and packaging;
- Sales – Secures contracts with supermarkets and negotiates pricing;
- Production – Prepares, cooks and packages meals;
- Quality control – Inspects food safety, hygiene and product standards;
- Distribution – Delivers products to retail stores.

Each activity has specific responsibilities that contribute to delivering the final product to customers.

1. Identify FOUR core activities in the organisation and explain the type of work performed in each activity.

2. Explain how the work done in product development differs from the work done in production.

3. Describe how the work done in sales and distribution supports the organisation's ability to deliver its product to customers.

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Criteria 3: Explain the Role of a Selected Work Unit in an Organisation in Relation to the Core Business

You work at FreshBite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores. The core business of the organisation is to produce and supply high-quality ready-to-eat meals to supermarkets. The organisation includes the following work units:

- Marketing – Researches customer needs and market trends;

- Product development – Designs new meal recipes and packaging;

- Production – Prepares, cooks and packages meals;

- Quality control – Ensures food safety and hygiene standards are met;

- Sales – Secures retail contracts and manages customer relationships;

- Accounting – Processes invoices and manages payments.

Each unit performs specific work that contributes to delivering the final product to customers.

1. Select ONE work unit from the scenario and describe the type of work it performs.

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2. Explain how the selected work unit supports or contributes to the core business of FreshBite Foods.

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3. Describe what could happen to the organisation if this work unit does not perform its role effectively.

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Criteria 4: Identify and Explain the Difference Between the Line and Support Functions within a Selected Organisation

Scenario:

You work at FreshBite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores. The core business of FreshBite is to produce and supply ready-to-eat meals to supermarkets. The organisation has the following work units:

- Production – Prepares and packages meals for retail stores;

- Sales – Secures contracts with supermarkets and manages customer relationships;

- Quality control – Ensures food safety and product standards;

- Marketing – Researches customer needs and market trends;

- Accounting – Manages invoices, payroll and financial reporting;

- Human resources – Recruits and trains employees;

- Information technology – Maintains the ordering and inventory systems.

Some of these units are directly involved in producing and delivering the final product, while others provide services that support the organisation's operations.

1. Identify TWO line functions and TWO support functions from the scenario.

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2. State the main difference between line functions and support functions in an organisation.

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3. Describe how ONE support function contributes to the success of a line function in the organisation.

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US 242814 - Rubric

The mentor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. Bullet points serve as guidelines for what to consider when marking each criterion.

Criteria activity number		Competent	Not Yet Competent	Comments / Action required
1	**Identify and explain the core business of an organisation.** • **Q1**: Correctly identifies the core business. • **Q2**: Describes how three core activities are linked and explains why coordination is important for efficiency and customer satisfaction. • **Q3**: Explains how inputs are transformed into outputs and identifies one high value-adding activity with a clear reason.			
2	**Explain the types of work done within the various core activities of an organisation.** ⬜ • **Q1:** Correctly identifies four core activities and briefly explains the type of work performed in each, showing clear understanding of their roles. • **Q2:** Clearly distinguishes between product development and production, showing understanding of different work functions. • **Q3:** Explains how sales and distribution support effective delivery to customers.			
3	**Explain the role of a selected work unit in an organisation in relation to the core business.**			

	Q1: Clearly selects one relevant work unit from the scenario and accurately describes the type of work it performs. **Q2**: Clearly explains how the selected work unit contributes to producing and supplying ready-to-eat meals, showing a direct link to the core business. **Q3**: Describes realistic consequences if the work unit fails to perform effectively.			
4	**Identify and explain the difference between the line and support functions within a selected organisation.** **Q1**: Correctly identifies two line functions based on whether they directly generate income or support operations. **Q2**: Clearly states the difference between line functions and support functions. **Q3:** Selects one support function and clearly explains how it supports a specific line function, showing understanding of their relationship.			

Date	Learner signature	Date	Mentor/supervisor signature

Unit Standard 11473 - Manage individual and team performance

This unit standard develops practical management skills by requiring learners to set measurable performance goals, formulate structured development plans, and monitor and evaluate individual and team performance against agreed targets. Through realistic workplace scenarios, the assessments test a manager's ability to align goals to organisational objectives, implement measurable improvement actions, analyse performance gaps, and take appropriate corrective action to improve results.

Criteria 1: Set Performance Goals and Measures

Scenario:

You are the Team Leader in the Customer Support Department at BrightWave Services. The company's objective for the next quarter is: "Improve customer satisfaction by reducing response time to customer queries."

Currently:

- Customer queries are responded to within 48 hours.
- Customer complaints about slow responses have increased.
- There are 6 customer support consultants in your team.
- No individual performance goals are currently set.
- Performance is reviewed quarterly.
- Some team members have indicated that targets are sometimes unrealistic when workloads increase.
- In previous quarters, goals were set by management without team consultation, and staff motivation declined.
- Management requires that all new performance goals must be discussed and agreed with team members before being included in performance contracts.

1. Formulate ONE clear performance goal for the team that aligns with the company's objective.

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2. Identify TWO measurable performance indicators that can be used to assess whether the goal is being achieved.

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3. Explain why it is important to agree on performance goals with team members before finalising them.

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Criteria 2: Formulate Development Plans

Scenario:

You are the Team Leader in the Customer Support Department at BrightWave Services. During the recent performance review, the following was identified:

- Two team members struggle to meet the 24-hour response target.

- One team member has strong technical skills but poor written communication.

- One team member has expressed interest in becoming a senior team leader within the next year.

- Customer complaints often relate to incomplete or unclear responses.

- The department must improve service levels over the next six months.

Company policy requires that development plans:

- Focus on improving competencies linked to performance goals;

- Include clear improvement actions;

- Include measurable outcomes;

- Include a time frame;

- Specify accountability;

- Be agreed upon by the employee and the Team Leader.

1. Identify TWO development needs from the scenario and explain how each need is linked to performance improvement.

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2. Develop ONE development plan for ONE team member. Your plan must include:

- The competency to be developed;

- The specific improvement action to be taken;

- A measurable outcome;

- A time frame;

- The person accountable for ensuring the development takes place.

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3. State TWO reasons why the development plan must be agreed upon by both the employee and the Team Leader, based on the company policy provided.

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Criteria 3: Monitor and Evaluate Performance

Scenario:

You are the Team Leader in the Customer Support Department at BrightWave Services. Three months ago, the following performance goals were agreed with your team:

- Respond to all customer queries within 24 hours;

- Reduce customer complaints by 15% within three months;

- Improve written communication quality in customer responses, measured through customer feedback ratings.

To monitor performance, you use the following evaluation techniques:

- A monthly performance review meeting with each employee;

- A quantitative performance report that measures average response time and number of queries handled;

- A qualitative assessment that reviews communication quality, teamwork and reliability;

- A customer satisfaction report that tracks complaints and feedback ratings.

The latest performance results show:

- Two team members consistently meet the 24-hour response target;

- One team member exceeds the target and receives consistently high customer satisfaction ratings;

- Two team members frequently miss the 24-hour response target;

- Customer complaints have reduced by 8% instead of the targeted 15%;

- All results are recorded monthly in the company's performance management system.

You are required to evaluate the team's performance and take appropriate action.

1. Identify TWO performance evaluation techniques used in the scenario and explain how each technique measures performance.

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2. Compare the team's current performance results with the agreed performance goals and identify ONE performance gap.

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3. Based on the performance information provided, state ONE corrective action you would take to address underperformance.

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US 11473 - Rubric

The mentor will assess the learner as *Competent* or *Not Yet Competent* based on consistent evidence. Bullet points serve as guidelines for what to consider when marking each criterion.

Criteria activity number		Competent	Not Yet Competent	Comments / Action required
1	**Set performance goals and measures.** • **Q1**: Formulates one clear, specific and measurable goal aligned to reducing response time and improving customer satisfaction. • **Q2**: Identifies two relevant, measurable indicators that allow performance to be quantified. • **Q3**: Provides a clear explanation of the importance of reaching mutual agreement on performance goals prior to finalisation.			
2	**Formulate development plans.** • **Q1**: Identifies two relevant development needs from the scenario and clearly links each to improved service levels or performance goals. • **Q2**: Develops one complete plan that includes a clear competency, specific action, measurable outcome, realistic time frame and identified accountability, aligned to performance needs. • **Q3**: States two valid reasons for agreement.			
3	**Monitor and evaluate performance.** • **Q1**: Correctly identifies two evaluation			

		techniques and clearly explains how each measures performance against goals. • **Q2**: Accurately compares actual results with targets and clearly identifies one specific gap. • **Q3**: States one realistic corrective action that directly addresses the identified underperformance.			

Date	Learner signature	Date	Mentor/supervisor signature