# 242820 FORMATIVE ASSESSMENTS WORKBOOK

Formative Assessment 1

1. Explain the reason why organisations record information.
2. Describe two purposes for which a record is used in your organisation.

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Formative Assessment 2

1. Name three methods of creating and storing records in your organisation.
2. Describe how technology has changed record keeping in your company:

**Discuss.**

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Formative Assessment 3

1. List four of the documents that you have to deal with in the course of an average week. State what the purpose of each of the documents is. Explain what kind of information is contained in each document.

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| **Document** | **Purpose** | **Information** |
| Discuss learners’ answers  **1.**  **2.**  **3.**  **4.** |  |  |

Formative Assessment 4

1. Sort the documents that land on your table on a regular basis into the four categories advised by Fletcher and give reasons as required in the headings:

Here are some examples of typical documents:

* Reports
* Memos
* Instructions
* Policy documents
* Information regarding the job
* Trade magazines
* Representatives’ business cards
* Junk mail
* Brochures
* Humorous e-mails
* Performance statistics

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| **Dump (Say why)** | **Delay (Say for how long)** | **Delegate (to whom and why are you comfortable delegating this document?)** | **Do (Say why)** |
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Formative Assessment 5

1. List 5 records of accidents, injuries and other incidents required by law or company policy and state how long you are required to keep each of these records:

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| **Records** | **To be kept for:** |
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1. Which documents are essential for a supervisor to keep? Say why, for how long and where you keep them.

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1. Explain why it is important to report an injury:

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Formative Assessment 6

1. **Prepare a verbal warning** with your partner. **Write out the words** you are going to say to a team member and then **underline** the elements of a verbal warning that have been covered (see right margin)

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| **Transcript of the verbal warning:**  **………………………………………………………………………………………………. am hereby giving you a verbal warning.**      **…………………………………………………………………………………………** |

Formative Assessment 7

1. The team member that you warned in the previous activity has not improved his/her behaviour. Compile a **written warning** below, making sure to include all the requirements as specified in your Learner Guide:

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Re:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Charge of\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Reference is made to the verbal warning you received on …………………..………………, wherein you were …

You are hereby warned that …

This warning is valid for …

Yours Faithfully

I know and understand the contents of this warning. I have received a copy of this warning.

Employee signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Witness Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Formative Assessment 8

1. Complete the following warning form:

Karel Pieterse had been given a verbal warning once before to keep the safety gates up which surround a giant bar-cutting machine in the special-order metal department.

Other workers passing on the walkway near the cutter could be injured if the cut bar kicked out even half a metre.

Yet, once again the gates are down. Veronica Maake, Karel’s supervisor, tells him, “Karel, I’ve warned you about the safety gates before. This time I’m going to give you a formal reprimand.”

When she gets back to her office, she begins filling out the form below. Fill in what she writes:

**Department:**

**Name of employee:**

**Supervisor:**

**Date and time of offence:**

**Date of warning:**

**Nature of violation:**

Production delay Safety violation

Material wastage Administrative violation

**Description of violation:**

**Terms of the warning:**

**Valid for:**

**Action required to rectify the situation:**

**Consequences of failure to take heed of this warning:**

**Comments:**

Formative Assessment 9

1. List 3 reports you must submit on a regular basis. State how often you are you expected to submit the reports.

**Discuss**

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| **Report** | **Frequency (daily/ weekly/ monthly)** |
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Formative Assessment 10

1. Name the types of information that you are required to keep about your team members.

**Discuss**

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Formative Assessment 11

1. Explain how company and team records influence decision-making regarding employees and work targets.

**Discuss**

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Formative Assessment 12

1. Explain why there is a need for confidentiality in maintaining employee records.

**Discuss**

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1. What would happen if confidentiality were not maintained?

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Formative Assessment 13

1. This is a graph that shows the employee at a glance whether s/he is meeting certain required standards.

**e.g. Employee comes late**

**Starting time 7:00, but employees should ideally be at work by 6:45.**

**Employee can see at a glance where s/he is not meeting the target and where s/he is exceeding the target**

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| **6:45**  **6:45** |  |  |  |  |
| **6:50**  **6:45** |  |  |  |  |
| **6:55**  **6:50** |  |  |  |  |
| **7:00**  **6:55** |  |  |  |  |
| **7.05**  **7:00** |  |  |  |  |
| **7.10**  **7:05** |  |  |  |  |
| **7.15**  **7:10** |  |  |  |  |
| **7.20**  **7:15** |  |  |  |  |
| **7.25**  **7:20** |  |  |  |  |
| **7:25** |  |  |  |  |

**Day 1 Day 2 Day 3 Day 4 Day 5**

Formative Assessment 14

1. Give the team member verbal feedback on the results shown on the graph. Remember to use the “sandwich” method (see US 8968):

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