## 8000 Workplace Project

### Research

#### Assessment activity 1.1

Make a list of resources used in your department/section. Use the following headings for the list: machinery, equipment, materials, time.

At least four resources to be noted under the correct headings

Work with your supervisor to allocate the resources to ensure productivity and effectiveness. Draw up a worksheet or action plan or use the form normally used by your supervisor. Indicate how the resources were allocated and if the allocation assisted the smooth running of the department. Your supervisor must add comments about your efforts and sign the form.

#### Assessment Activity 1.2

Your supervisor must have goals and objectives for the department. Use these goals and convert them into weekly goals and objectives for the department. Use the form provided by your organisation or develop a form. Your supervisor must add comments to confirm that your goals reflect those of the organisation and sign off the form.

Study the budget allocated to your department for normal day to day operations. Identify one area of the budget and make suggestions on how to ensure that your department does not go over budget for this item. Attach a copy of your suggestion as well as the budget to your assessment.

Do research to find out what the cost would be if one of the drivers has an accident and the vehicle cannot be used for 5 days. You will have to consider loss of revenue from the operating of the vehicle, repairs that have to be done to the vehicle, the loss in working time of the driver, etc. Discuss this with your supervisor for advice. Use a company incident form (or another form used by the company for this purpose) to show the cost calculations. Attach the form to your assessment.

### Written assessment

#### Assessment Activity 1.3

Explain what your organisation’s policy is regarding customer service: how should customers be treated when they come face-to-face with employees of the organisation? How can this policy be improved? Make at least one recommendation.

#### Assessment Activity 1.4

Identify three internal and three external customers of your department. Identify their needs and explain what your department does to meet these needs. Make one suggestion on improving customer service in your department that will not affect the budget.

#### Assessment Activity 1.5

Investigate the use of technology in your organisation and how it can be improved. Find out the cost of the new technology and weigh the benefits against the cost in the form of a table. Based on the information, make a recommendation on whether the organisation should invest in this technology or not.

### Work sample

#### Assessment activity 1.6

Find your organisation’s code of conduct and explain what the policy in your organisation is regarding drivers selling tickets that the company does not know about and keeping the money for themselves, or the policy regarding accepting gifts and money from customers. Do you agree with this policy? Motivate your answer.

What type of business entity is the organisation that you work for? Explain the entity in terms of membership and legal personality.

What do you think would happen to the organisation if the demand for their products or service suddenly drops because customers are making use of the services (products) of the competition? You have to phrase your explanation by thinking about the profitability of the company, closing down certain departments and job losses.

Find out from your shop steward when a strike can be declared legal and then in your own words, explain what would happen to the profitability of the company if the employees were to strike for five working days?

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| Date | Candidate signature | Date | Mentor/supervisor signature | |

## Evidence Locator

| Evidence required  (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) | Sources of evidence  (where/how the assessor can find the evidence) |  | | Assessor’s comments in support of judgement  (where required) | |
| --- | --- | --- | --- | --- | --- |
| ✓ | X |  |
| SO1, AC1  Demonstrate an understanding of the impact of quality customer service on profitability | Assessment activity 1.3, 1.4 |  |  |  |
| SO1, AC2  Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO1, AC3  Identify and explain methods for ensuring cost-effective utilisation of allocated resources | Assessment activity 1.1, 1.6 |  |  |  |
| SO1, AC4  Suggest methods to be used to combat cost overruns with respect to a given budget | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO1, AC5  Explain how an individual`s actions impact on organisational profit and/or loss and cashflow | Assessment activity 1.2, 1.6 |  |  |  |
| SO1, AC6  Describe the impact of new technologies on the budget of an organisation | Assessment activity 1.5 |  |  |  |
| SO1, AC7  Describe relationships between the stakeholders in a business and how that will impact on an organisations` success | Assessment activity 1.3, 1.4 |  |  |  |
| SO2, AC1  Demonstrate an understanding of the impact of quality customer service on profitability | Assessment activity 1.3, 1.4 |  |  |  |
| SO2, AC2  Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO2, AC3  Identify and explain methods for ensuring cost-effective utilisation of allocated resources | Assessment activity 1.1, 1.6 |  |  |  |
| SO2, AC4  Suggest methods to be used to combat cost overruns with respect to a given budget | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO2 AC 5  Explain how an individual`s actions impact on organisational profit and/or loss and cashflow | Assessment activity 1.2, 1.6 |  |  |  |
| SO2 AC 6  Describe the impact of new technologies on the budget of an organisation | Assessment activity 1.5 |  |  |  |
| SO2 AC 7  Describe relationships between the stakeholders in a business and how that will impact on an organisations` success | Assessment activity 1.3, 1.4 |  |  |  |
| SO3 AC 1  Demonstrate an understanding of the impact of quality customer service on profitability | Assessment activity 1.3, 1.4 |  |  |  |
| SO3 AC 2  Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO3 AC 3  Identify and explain methods for ensuring cost-effective utilisation of allocated resources | Assessment activity 1.1, 1.6 |  |  |  |
| SO3 AC 4  Suggest methods to be used to combat cost overruns with respect to a given budget | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO3 AC 5  Explain how an individual`s actions impact on organisational profit and/or loss and cashflow | Assessment activity 1.2, 1.6 |  |  |  |
| SO3 AC 6  Describe the impact of new technologies on the budget of an organisation | Assessment activity 1.5 |  |  |  |
| SO3 AC 7  Describe relationships between the stakeholders in a business and how that will impact on an organisations` success | Assessment activity 1.3, 1.4 |  |  |  |
| SO4 AC 1  Demonstrate an understanding of the impact of quality customer service on profitability | Assessment activity 1.3, 1.4 |  |  |  |
| SO4 AC 2  Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO4 AC 3  Identify and explain methods for ensuring cost-effective utilisation of allocated resources | Assessment activity 1.1, 1.6 |  |  |  |
| SO4, AC4  Suggest methods to be used to combat cost overruns with respect to a given budget | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO4, AC 5  Explain how an individual`s actions impact on organisational profit and/or loss and cashflow | Assessment activity 1.2, 1.6 |  |  |  |
| SO4, AC6  Describe the impact of new technologies on the budget of an organisation | Assessment activity 1.5 |  |  |  |
| SO4, AC 7  Describe relationships between the stakeholders in a business and how that will impact on an organisations` success | Assessment activity 1.3, 1.4 |  |  |  |
| SO5, AC 1  Demonstrate an understanding of the impact of quality customer service on profitability | Assessment activity 1.3, 1.4 |  |  |  |
| SO5, AC2  Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO5, AC3  Identify and explain methods for ensuring cost-effective utilisation of allocated resources | Assessment activity 1.1, 1.6 |  |  |  |
| SO5, AC4  Suggest methods to be used to combat cost overruns with respect to a given budget | Assessment activity 1.1, 1.2, 1.6 |  |  |  |
| SO5, AC5  Explain how an individual`s actions impact on organisational profit and/or loss and cashflow | Assessment activity 1.2, 1.6 |  |  |  |
| SO5, AC 6  Describe the impact of new technologies on the budget of an organisation | Assessment activity 1.5 |  |  |  |
| SO5, AC7  Describe relationships between the stakeholders in a business and how that will impact on an organisations` success | Assessment activity 1.3, 1.4 |  |  |  |

# ASSESSMENT REVIEW

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| Name Of Learner | | | | | | | Name Of Assessor | | | |
|  | | | | | | |  | | | |
| Date of review | | | | | | |  | | | |
| Unit Standard | | Applying basic business principles | | | | | | | | |
| Review Dimension | | | Assessor | | | Learner | | Action | | |
| The principles/criteria for good assessment were achieved. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The assessment related to the registered unit standard. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The assessment was practical. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| It was time efficient and cost-effective and did not interfere with my normal responsibilities. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The assessment instruments were fair, clear and understandable. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The assessment judgements was made against set requirements. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The venue and equipment was functional. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| Special needs were identified and the assessment plan was adjusted. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| Feedback was constructive against the evidence required. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| An opportunity to appeal was given. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| The evidence was recorded. | | | Agree  Disagree | | | Agree  Disagree | |  | | |
| Learner’s Declaration Of Understanding | | | | | | | | | | |
| I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid. | | | | | | | | | | |
|  | | | |  | | | | |  | |
| Learner | Date | | | Assessor | Date | | | | Moderator | Date |

## Candidate Feedback Report

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Candidate's Name |  | | | | ID No. |  |
| Assessor's Name |  | | | | Reg. No. |  |
| Unit Standard Title | Applying basic business principles | | | | | |
| Assessment Decision | | | | | | |
| Source of Evidence | C | NYC | Comments | | | |
| Assessments |  |  |  | | | |
| Product |  |  |  | | | |
| Indirect Evidence |  |  |  | | | |
| Overall Assessment Decision | | |  | | | |
| Additional Notes | | |  | | | |
| Date | | | |  | | |
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| Signature of Assessor | | | | Signature of Candidate | | |

## Candidate Appeal Form

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Candidate's Name: | | | ID No. |  | |
| Assessor's Name: | | | Reg. No. |  | |
| Unit Standard: Applying basic business principles | | | | | |
| Date: |  | | | | |
| Section 1 |  | | | | |
| Candidate's reason for disagreeing with the assessment decision. | |  | | | |
| Assessor's rationale for the assessment decision. | |  | | | |
| Candidate's signature. | |  | | | |
| Assessor's signature. | |  | | | |
| **SECTION 2** | | | | |
| Internal Moderator’s reconsidered decision and rationale | |  | | |
| Internal Moderator's Signature | |  | | |
| Advising Assessor’s Signature | |  | | |
| Decision and rationale of the investigatory panel | |  | | |
| Learner Declaration | | The above decisions have been explained to me and I accept the assessment decision | | |
| Learner’s Signature | |  | | |
| Date | |  | | |

Please send this form to: The training provider

## Assessor's Report

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| Candidate's Name |  | | | | ID No. | | |  |
| Assessor's Name |  | | | | Reg. No. | | |  |
| Unit Standard Title | Applying basic business principles | | | | | | | |
| Assessment Decision | | | | | | | | |
| Specific Outcome | | | C | | | NYC | Comments | |
| Utilise machinery, equipment, materials and time allocated to the individual cost effectively and productively | | |  | | |  |  | |
| Identify and apply goals aligned to the work situation which reflect the organisational goals. | | |  | | |  |  | |
| Maintain and enhance organisational image and customer service (both internal and external). | | |  | | |  |  | |
| Identify and anticipate customer`s requirements, and meeting those requirements within budget constraints | | |  | | |  |  | |
| Select and implement the most effective business solution to problems within his/her own operational environment and level of authority | | |  | | |  |  | |
| Overall Assessment Decision. | |  | | | | | | |
| Comments | |  | | | | | | |
| Date | |  | | | | | | |
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| Signature of Assessor | | | | Signature of Candidate | | | | |

## Moderator's Report

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Moderator's Name |  | | | | Reg. No. | |  |
| Assessor's Name |  | | | | Reg. No. | |  |
| Candidate's Name |  | | | | ID No. | |  |
| Unit Standard Title | Applying basic business principles | | | | | | |
| Moderation Decision | | | | | | | |
| Specific Outcome | | | C | NYC | | Comments | |
| Utilise machinery, equipment, materials and time allocated to the individual cost effectively and productively | | |  |  | |  | |
| Identify and apply goals aligned to the work situation which reflect the organisational goals. | | |  |  | |  | |
| Maintain and enhance organisational image and customer service (both internal and external). | | |  |  | |  | |
| Identify and anticipate customer`s requirements, and meeting those requirements within budget constraints | | |  |  | |  | |
| Select and implement the most effective business solution to problems within his/her own operational environment and level of authority | | |  |  | |  | |
| Overall Moderation Decision | |  | | | | | |
| Feedback to Assessor | |  | | | | | |
| Action Required | |  | | | | | |
| Date of Moderation | |  | | | | | |
| Signature of Moderator | |  | | | | | |
| Signature of Assessor | |  | | | | | |
| Signature of Candidate | |  | | | | | |

# PORTFOLIO BUILDING

Your Portfolio of Evidence (PoE) contains the evidence needed to declare you competent and to award credits towards the award of this qualification to you. Evidence should be authentic and reflect both your knowledge of the subject and your ability to apply this knowledge in the workplace. Thus, evidence of day to day activities supporting the specific outcomes addressed by this learning programme should complement the theoretical learning you attended and were assessed on.

There are five key steps in creating a portfolio that will reflect your competence.

#### Plan Your Portfolio

Plan and document the sequence, graphics and layout of your portfolio. This will assist you in following a logical sequence, which makes the Portfolio also much more user friendly and understandable for the assessor. It will also reflect your professional approach and attitude towards the subject matter, your work and your life. Impact and appearance always contribute to or affect your chances of being taken seriously and declared competent!

#### Gather The Evidence

An evidence checklist has been provided (Section 4) to tell you what evidence needs to be gathered for assessment purposes. However, there are four broad categories of evidence that you should include:

* Knowledge evidence (your knowledge questionnaire).
* Direct performance evidence (actual samples of your work or records of activities captured on audio or video tape).
* Indirect performance evidence (documentary records of your performance e.g. appraisals, photographs, testimonials, self-assessments, customer ratings etc.).
* Supplementary evidence (to confirm the authenticity of your evidence).

#### Evaluate Your Evidence

Once you have collected your evidence, evaluate each piece by ensuring that it is:

* Valid (relevant to the unit standard/s being assessed).
* Authentic (clearly your own work).
* Current (not more than 2 years old).
* Sufficient (adequate to prove your competence against all of the assessment criteria and range statements in the unit standard/s).

#### Cross-Reference Your Evidence To The Unit Standards

Evidence for assessment against unit standards must be linked to the outcomes of the unit standard in question. An evidence locator grid is useful for this.

#### Organise Your Information

How you structure your portfolio is critical. Your design and layout must look professional and clearly articulate your achievements, and it should make sense to someone seeing it for the first time. Use the following structure as a guide:

1. A title page indicating:

* The title of the programme.
* The unit standard titles to which the programme is aligned.
* The assessment centre (Training Provider).
* Your name, position and organisation.
* Your contact details.
* The name of your assessor.
* The name of your moderator.
* The date.

1. An index.
2. Background information:

* Curriculum Vitae.
* Organisation profile.
* Job profile.
* Organisation/department structure.

1. A copy of the unit standard/s.
2. Your assessment plan.
3. Your completed Knowledge Questionnaire.
4. An evidence locator grid.
5. The evidence itself.
6. Supporting evidence e.g. witness testimonies, reflections and witness status list.
7. Assessment records.