

# Learning Assessment Guide

## Unit Standard 23396 – Version 1

### *Demonstrate knowledge of performance management planning*

### Level 4 – 3 Credits

<b>Assessment Summary</b>			
<b>Learner to complete</b>			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
<b>Assessor to complete</b>			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

### Statement of Authenticity

I confirm that all written work produced as evidence for assessment of Unit Standard 23396 V1; Level 4 *Demonstrate knowledge of performance management planning* is all my own work

..... (Learner's name & signature)

Date: .....

## Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

The tasks in this assessment are designed to show your assessor that you can:

- Demonstrate knowledge of the role of performance management in an organisation.
- Develop a performance management plan

This Learning Assessment Guide is made up of:

- Task(s) for you to complete.
- Manager or Team Leader Verification form,

## Instructions

- Read through all the information contained in this Learning Assessment Guide
- Make sure you understand what is required for each assessment task
- Clarify anything you are unsure about with your assessor, trainer or supervisor
- It is important that you read and are familiar with, the terms and definitions contained in the special notes
- Sources of evidence may include:
  - Written evidence
  - Verbal answers recorded by the assessor.
  - Verification form(s) completed by your manager or team leader
- For written evidence, please complete your answers in the spaces provided
- If you mail your assessment to your assessor, make sure to keep a copy of the completed assessment for your own records
- All evidence provided for assessment for this unit standard, must be your own work
- Any material copied or taken from another source must be properly acknowledged and referenced.

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**Special notes**

- 1 This unit standard is for people who manage or seek to manage or supervise work teams.
- 2 Legislation relevant to this unit standard includes but is not limited to:  
Human Rights Act 1993  
Privacy Act 1993  
Employment Relations Act 2000.
- 3 Glossary  
*Organisation* refers to a specific business entity which may be – profit or non-profit; in private, public, or voluntary sectors; a business unit, iwi, or other special purpose body.
- 4 This unit standard will be assessed on the basis of evidence of demonstrated performance in the workplace, or in simulated situations that demand performance equivalent to that required in work.
- 5 The individual referred to in element 1 is preferably a member of a work team managed by the candidate, or another individual, but may be the candidate him/her self.

## Assessment Task One

### Introduction

This assessment focuses on the role of performance management in an organisation.

### Element One

#### Instructions

- You have the option to write your responses or provide oral answers to this task.
- In the event that you choose to provide oral answers to task one, your assessor must record and hold your responses as evidence.
- Complete all questions
- Include copies of:
  - the organisation's strategic plan
  - the organisation's business plan
  - the individual's performance management plan.

#### Tasks

1. Choose an individual and an organisation to use as examples and:
  - a) Identify and describe the person's position within the organisational structure
  - b) Describe the organisation business plan. Make sure you link the business plan to the organisation purpose.
  - c) Describe the relationship between the position / role of the person and the organisation business plan and purpose
  - d) Identify and describe at least **five** essential components of the person's performance management plan;  
and describe the purpose of each of these essential components.

The range includes but is not limited to: – training and development needs, review times, objective setting, coaching, timeframes, recording and reporting requirements, link to other performance management initiatives.

#### Remember to include copies of:

- **the strategic plan,**
- **the business plan**
- **the performance management plan**

## Assessment Task Two

### Introduction

This assessment focuses on developing a performance management plan.

### Instructions

- You have the option to write your responses or provide oral answers to this task.
- In the event that you choose to provide oral answers to task two, your assessor must record and hold your responses as evidence.
- Complete all questions
- Ensure you include any supporting documentation
- Ensure your manager completes and signs the manager verification form

### Element Two

#### Tasks

2. Explain how the individual performance management plan you have developed is consistent with the organisation business plan.
3. a) Describe the outcomes of your performance management plan.  
Ensure they include outcomes that are specific, measurable, achievable realistic and time bound.  
b) Explain how you reached agreement on these outcomes with the parties involved.
4. Explain how you have established a performance monitoring process to suit the organisation's performance management plan.  
This must include timeframes and the reporting and review process.  
Present any organisational documentation used to support this monitoring process.
5. Explain the procedures for managing any unsatisfactory staff performance and how this complies with organisational requirements.

#### Remember to include:

- **copies of organisation documents that support your explanation**
- **completed and signed manager verification form**

## Manager Verification Form

### Unit Standard 23396 (Version 1)

### ***Demonstrate knowledge of performance management planning (Level 4) (3 Credits)***

As the learner's manager you are asked to verify that the learner:

- |  | <b>Yes</b>                   | <b>No</b>                    |
|--|------------------------------|------------------------------|
| <b>1</b> Understands the role of the organisation's:   |                              |                              |
| a) Strategic plan  | <input type="checkbox"/>     | <input type="checkbox"/>     |
| b) Business plan   | <input type="checkbox"/>     | <input type="checkbox"/>     |
| c) Performance management system   | <input type="checkbox"/>     | <input type="checkbox"/>     |
| <br><b>2</b> Understands the organisational procedures for the management and monitoring of unsatisfactory performance.            | <br><input type="checkbox"/> | <br><input type="checkbox"/> |
| <br><b>3</b> Understands the organisational process to gain agreement on the outcomes included in the performance management plan. | <br><input type="checkbox"/> | <br><input type="checkbox"/> |

Additional comments or questions asked: .....

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**Manager Verification**

Learner \_\_\_\_\_ Verifier \_\_\_\_\_

Position of verifier \_\_\_\_\_ Relation to learner \_\_\_\_\_

Contact details of verifier \_\_\_\_\_

I \_\_\_\_\_ verify that \_\_\_\_\_

has developed a performance management plan that is consistent with the organisations' business plan

Signed \_\_\_\_\_ Date \_\_\_\_\_