OBE for FET Colleges office administration

Office Practice

Office Data Processing

Business Practice

level 2

lecturer's guide

NVA panel

contents

Commonly used acronyms

AS	Assessment standard
CASS	Continuous assessment
CO	Critical outcome
DO	Developmental outcome
DoE	Department of Education
ESASS	External summative assessment
FET	Further Education and Training
GET	General Education and Training
HET	Higher Education and Training
HIV/Aids	Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome
ICASS	Internal Continuous Assessment
SB	Student's Book
SO	Subject outcome
T	Topic
LO	Learning outcome
LP	Learning programme
SSM	Student Support Material
LTSM	Learning and teaching support materials
NCS	National Curriculum Statement
NSC	National Senior Certificate
NCV	National Certificate (Vocational)
NQF	National Qualifications Framework
NVC	New Venture Creation
OBE	Outcomes-based education
SKAVs	Skills, knowledge, attitudes and values
SWOT	Strengths, weaknesses, opportunities and threats
LG	Lecturer's Guide

1.   How to use this Lecturer's Guide

The Lecturer's Guide includes guidance and additional information, together with suggested assessment and a 40 week plan.
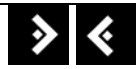
The sections on **guidance and additional information** offer useful suggestions on how to present the learning material, how to prepare and how to conduct each activity. Ideas for individual, pair, group, class and Portfolio of Evidence activities have been designed to cover the SO, LO and ASs.

Assessment should be continuous. At the end of each unit in the Student's Book, there is an opportunity for self-assessment by the students. These formative assessment questions are directly linked to the outcomes of each unit and could be used as part of tests and examinations.

In each unit in this Lecturer's Guide, guidance has been given regarding **assessment methods, instruments and tools** for the activities in the Student's Book. Some **additional assessment** opportunities are also included. **Rubrics and checklists** have been prepared to assist you with assessment. You can choose to use these assessment tools as they are, or adapt them to suit your specific needs. At the end of each chapter in this Lecturers Guide, there is a grid summarising the assessment for each activity. This could be used or adapted for Portfolio of Evidence assessment purposes for each student.

Using this Lecturer's Guide with the Student's Book

Icons have been used throughout the Student's Book to consolidate and facilitate the learning process, and to adopt an interactive approach between the student and the text. The icons indicate different types of activity – for example, a group or a question or feedback activity. The icons are also used to indicate what is being dealt with – for example, outcomes, assessment, or a cross-reference to something else.

⟩ ⟨	**Cross-reference** This icon shows forward or backward links or references to other sections in the book.
	Outcomes Outcomes appear in the outcomes table at the beginning of each unit. The students should achieve these unit outcomes, which are derived from the Assessment Standards in the New Venture Creation NCS document.
◯	**Individual** This icon indicates that students should work on their own.
◎	**Pair work** This icon indicates that the students should work in pairs.
◎	**Group work** This icon indicates that the students should works in groups. Groups of four or five students are usually ideal, but it depends on the type of activity.
☑☒	**ICASS** This icon shows an activity that could be used as part of the continuous assessment (ICASS) process, which should take place throughout the year.

word bank	**Word bank** New or difficult terms are explained or defined. Sometimes 'New Venture Creation' words have different meanings to everyday language, so the aim is to extend the students' use of the English language and New Venture Creation' terminology.
did you know?	**Did you know?** Reference to web site and other sources of information to extend the students knowledge base.
	Questions This icon provides the student with opportunities for self-assessment and ensures that the learning process has taken place. Questions at the end of each unit form part of summative assessment and assist the students to reflect on what they have learnt.
	Minds This icon indicates knowledge outcomes that students should have acquired.
	Hands This icon shows skills-based outcomes or activities developed for students to apply knowledge (and values) that they have acquired.
	Hearts This icon shows values-based outcomes that assist the students to express or develop particular values (or attitudes) to the issues raised.

2.   The new curriculum

A process of transforming education and training to realise the aims of our democratic society and of the Constitution has been underway since 1994. As part of this process, the outcomes-based curriculum (OBE) was developed as one united curriculum for all school students in the General Education and Training (GET) and Further Education and Training (FET) bands. The new curriculum was designed to be student-centred, integrated and holistic, relevant to students' lives and the needs of the country, and to promote critical and creative thinking.

What has changed?

The table below outlines some of the some changes and compares terms used in the pre-OBE and OBE stages.

Pre-OBE	OBE
Old terms/phrases	**New terms/phrases.**
Core syllabus	Subject Guidelines Assessment Guidelines
Scheme of work	A Learning Programme consists of 2 stages of planning 1. Work Schedule per level per subject 2. Lesson Plans
Aims	Learning outcomes (LOs)
Objectives/topics/content	Assessment standards (ASs)
Lesson plan	Lesson plan or learning experience
Text books	Learning and Teaching Support Materials (LTSM) – includes various learning and teaching resources like CDs, videos, text books, etc.
Learning/syllabus is content-driven. Role learning takes place.	Learning is outcomes-based. The curriculum is relevant, communicative, connected to real-life situations and provides for the development of knowledge, skills and values in an integrated way.
Traditional teaching methods may have included learning being textbook-driven.	Traditional teaching methods are enhanced through methods that require the students to be actively involved.
Lecturer-centred	Student-centred and lecturer plays a facilitator/mediator role.
Students' work is assessed by the lecturer	A variety of assessment methods are used (self-assessment, peer assessment, group assessment, lecturer assessment, etc.).
Test-based assessment	Observation, Test and Task-based assessment take place.
Lecturer is responsible for learning – motivation depends on the personality of the lecturer.	Students take responsibility for their own learning – students are motivated by constant feedback and affirmation.

3.   Subject Outcomes and Learning Outcomes

Outcomes-based education calls for lifelong learning by demonstrating nine critical cross-field outcomes (CCOs).

Each of the subjects have topics linked to Subject Outcomes together with corresponding Assessment Standards (ASs) and Learning Outcomes (LOs) that are derived from the CCOs and which describe the knowledge, understanding, skills and values that students should demonstrate and be able to do at the end of the FET Colleges band.

4.   OBE for FET Colleges series and the principles of the curriculum

The National Curriculum Statement (NCS) follows the principles, purpose and thrust of Curriculum 2005, including OBE.

There is an emphasis on the key principles and values of social transformation, progression, articulation and portability, human rights, inclusivity, environmental and social justice as well as valuing indigenous knowledge systems.

OBE, integration and applied competence, credibility, quality and efficiency, high knowledge and high skills underpin the curriculum and are all covered within the purpose, scope and the specific topics of each subject. This series deals with each of the following issues in ways that specifically suit the particular subject and Vocational Programme.

Social transformation

The NCS builds on the visions and values of the Constitution. The Constitution expresses the nation's social values and the roles, rights and responsibilities of citizens in a democratic South Africa. In promoting the students' personal development, we should ensure that we build a national South African identity.

Valuing indigenous knowledge systems

The rich history and heritage of South Africans needs to be recognised as important contributors to the values contained in the Constitution. Indigenous and endogenous local communities need to be included in our economic actions and thinking.

Human rights, inclusivity, environmental and social justice

The NCS reflects the principles and practice of social justice, and respect for the environment and human rights, as defined in the Constitution. In particular, the curriculum attempts to be sensitive to issues of poverty, inequality, race, gender, age, disability and challenges such as HIV/Aids. Students are encouraged to develop an awareness and understanding of the rich diversity of cultures, beliefs and worldviews within the unity of South Africa.

The Bill of Rights places great value on equality, human dignity, life, freedom and security. These and other rights to freedom of religion and belief, expression

and association, exist alongside socio-economic rights. Each person has a right to freedom from poverty, homelessness, poor health and hunger.

Outcomes-based education

Outcomes-based education forms the foundation of the South African curriculum. The LOs and ASs have been derived from the COs which were inspired by the Constitution, will ensure that knowledge, skills and values are articulated

High knowledge and high skills

The NCS sets standards in the learning areas and specifies the minimum knowledge and skills to be achieved by students in each grade. In this way, the NCS provides direction on how to develop a high level of skills and knowledge in all students. In New Venture Creation the necessary knowledge and skills have been built into the text and the activities.

Integration and applied competence and progression

Integration both within and across learning areas is central to OBE, because of the belief that fields of knowledge are connected. Some of the skills taught in one learning area may also be needed to achieve a learning outcome in another learning area. Achieving an optimal relationship between progression and integration is central to this curriculum. Within each subject, the NCS sets out progressively more complex expectations of students from level to level. This is called conceptual progression, and the NCS describes this progression through the ASs. Integration is about making links within and across learning areas, through related LOs and ASs. It is also about students developing skills, attitudes and values, as well as acquiring knowledge by integrating theory and practice. Complexity and depth in learning increases from the beginning to the end of a level (vertical progression) and from level to level (horizontal progression).

Credibility, quality and efficiency

Articulation refers to the relationship between qualifications in the different NQF bands (GET/FET) and portability to the extent to which parts of a qualification are transferred to another qualification in a different learning pathway of the same NQF band. This allows for mobility across and within the FET band and recognition of prior learning.

5. Planning for the new curriculum

Please see the file for the specific subject for the 40 week plan and programme of assessment for that subject.

It is imperative that Lecturers plan ahead. Students will not be able to attain the SOs prescribed by the LOs for a specific level if the Lecturer does not plan adequately. Planning could be summarized as follows:

- a three-year subject framework (*macro planning*)
- a one-year work schedule that sets out the pace and sequence of teaching and learning activities, and assessment. This work schedule will spell out 'term plans' of work to be covered in a particular term (*meso planning*)

- weekly and daily planning (lesson plans or learning experiences) specifying activities (*micro planning*).

Assessment

Assessment in the National Certificates (Vocational) is underpinned by the objectives of the National Qualifications Framework (NQF), is part of the learning process and should not be seen as a separate activity. Assessment is done to:
- determine what students know and at what point to start with the new learning experience
- identify and diagnose any barriers to learning
- create an integrated national framework for learning achievements
- provide information for reviewing and evaluating learning programmes
- encourage students to participate in the learning process
- apply and use knowledge in real-life contexts.

    The following aspects are assessed:
- subject outcomes (SOs)
- learning outcomes (LOs)
- assessment standards (ASs)
- knowledge, skills, values and abilities
- metacognition
- integrated assessment tasks.

The table below could be used as a checklist to determine whether the assessment target meets the method. For example if you want to assess skills, performance-based and observation-based assessment are the best methods to do this (check that they both have a rating of 5).
    Note: Higher numbers indicate better matches (e.g. 5 = high, 1 = low). Table adapted from *MacMillan (1997) Classroom Assessment: Principles and Practice for Effective Instruction.*

	Objective	Essay	Performance based (Individual)	Oral questions	Observation	Self-assessment
Knowledge	5	4	3	4	3	2
Reasoning	2	5	4	4	2	2
Skills	1	3	5	2	5	3
Product	1	1	5	2	4	4
Values and attitudes	1	2	4	4	4	5

[Note: the higher numbers indicate better matches (e.g. 5 = high; 1 = low). Table adapted from McMillan (1997) Classroom assessment: Principles and practice for Effective Instruction.]

Tools and instruments for assessing student performance

Methods for assessment (Who carries out the assessment?)	
Self-assessment	Group assessment
Peer assessment	Lecturer assessment
Assessment forms	
Presentation	Examination
Debate or argument	Project
Interview	Simulation
Demonstration	Research or investigation
Questionnaire	Assignment
Role-play	Case study
Test	Practical task
Tools for assessing student performance	
Rubric	Observation sheet
Rating scale	Marking memorandum
Checklist	Assessment grid, etc.
Recording tools	
Class list	Day-by-day assessment sheet
Mark sheet	Promotion schedule, etc.
Reporting tools	
Report card using national codes and comments on competence	Lecturer-student interview
	Written comments in student's workbook
Lecturer-parent interview	Day-by-day assessment sheet, etc.

1.   When do we assess?

Baseline assessment takes place **at the beginning** of an activity or a learning process so that lecturers and students find out what students already know. The recording of baseline assessment is usually informal.

Diagnostic assessment takes place **throughout** the learning process and is used to identify and diagnose barriers that students may have so that lecturers can plan to overcome these. It includes extended opportunities and activities for gifted students.

Formative assessment is used **throughout** the learning process to inform whether teaching and learning is successful in achieving the outcomes. Any form of assessment that gives feedback to the student fulfils a formative purpose.

Summative assessment takes place **over time and at the end** of a learning experience. It can occur at the end of a single learning activity, a unit, a cycle, a term, a semester or a year.

2.   Assessment methods

Some of the assessment methods used in most education systems are explained below:
- **Self assessment:** Students assess themselves against given criteria (skills that are important for life-long learning), which may be reflected on a self-checklist. Students reflect on their own performance and recognise the limitations of their work.

- **Peer assessment:** Students assess each other in pairs or groups and may use checklists to do this. Peer assessment should not be interpreted as students marking each other's work and/or counting the marks.
- **Three-way assessment:** This provides an opportunity for students, lecturers and care-givers to acknowledge a student's progress and achievement. Students take work home that has been assessed by the lecturer and by themselves. Care-givers respond with a comment on the student's achievement and progress.
- **Test-based assessment:** The same evidence is gathered for all students in the same way and at the same time. It is far more rigid process. A mark or a score verifies tests and examinations. In the past, too much emphasis was placed on tests and examinations.
- **Task-based assessment:** This includes well-structured assessment activities that show whether students are competent at applying the skills and knowledge they have learnt to unfamiliar contexts or contexts outside the classroom. Task-based assessment has its own range of scoring instruments in a marking memorandum. Criteria or standards have to be carefully selected (and sometimes negotiated with the students) and should be described in a rubric.
- **Performance-based assessment:** This is a direct or systematic observation of a student's performance or an examination. Performance-based assessment requires students to engage in activities where they demonstrate specific skills or develop specified tasks (e.g. projects, debates, assignments, speeches and presentations).

3.　Internal continuous assessment (ICASS)

Knowledge, skills, attitudes and values (SKAVs) are assessed throughout the year using assessment instruments such as projects, tests, assignments, investigations, role-play and case studies. The internal continuous assessment (ICASS) practical component is undertaken in a real workplace, a workshop or a 'structured environment'. This component is moderated internally and externally quality assured by Umalusi. All internal continuous assessment (ICASS) evidence is kept in a Portfolio of Evidence (PoE) and must be readily available for monitoring, moderation and verification purposes.

ICASS:
- allows lecturers to use any planned learning experience to assess student achievements and progress
- is a necessary feature of the total evaluation of every student
- takes place over a long period
- is diagnostic and allows the lecturer to monitor strengths
- assists in addressing the needs of the student
- enables lecturers to pace students and provide enrichment
- sets well-defined outcomes for the students to achieve
- ensures that the learning programme is significant for the student, and prevents 'teaching for a test'
- covers a wide spectrum of learning activities and tasks
- is transparent as students are aware of the assessment criteria
- develops a sound assessment record to track the learning progress
- provides useful data for reporting and progression

- involves assessment of knowledge, skills, attitudes and values
- encourages lecturers and students to appraise their own work.

A compulsory component of external summative assessment (ESASS) is the **integrated summative assessment task (ISAT).** This assessment task draws on the students' cumulative learning throughout the year. The task requires **integrated application of competence** and is executed under strict assessment conditions. The task should take place in a simulated or 'structured environment'. The ISAT is the most significant test of students' ability to apply their acquired knowledge. The integrated assessment approach allows students to be assessed in more than one subject with the same ISAT. External summative assessments will be annually between October and December, with provision made for supplementary sittings.

4.   Number and forms of assessment for Level 3 assessment programme

At Level 3, an internal assessment component counts 50% of the final assessment mark. An example of the requirement of the internal assessment programme for Level 3 is summarized as follows:

Term 1	Term 2	Term 3	Total
One task, e.g. Assignment	One task, e.g. Project	One task, e.g. Presentation	Three tasks
One test		One test	Two tests
	June examination	September examination	Two examinations
			Seven items

Examinations should conform to the requirements set by the Department of Education. They should be carefully designed and weighted to cover all the LOs.
     The tasks should be carefully designed which will give the students opportunities to research and explore the subject in a focused and exciting manner. Examples of forms of assessment are debates, presentation, projects, simulations, assignments, models, case studies, long essays and research projects.

Instrument 1: Control tests (two per year) and examinations (two per year)

The following conditions apply to control tests:
- all classes in the same level write the same test at the same time
- the test should be based on accumulative work
- moderation of the question paper and answer scripts should take place at college level (internal college moderation)
- tests should be written under examination conditions
- questions should comply with the end-of-the-year examination standards
- where there is more than one lecturer teaching the same subject, agreement should be reached on the scope, date and time of the test.

The structure and mark allocation should be similar to the final National Senior Certificate (NCS) Level 2 examination.

Instrument 2: Research assignment (minimum of one per year)

For assignments, students are required to investigate and report on certain issues. Ideally the task should be phrased as a question so that students can form their own opinions based on acquired subject knowledge. Assignments may also be in the form of practical research.

Instrument 3: Project (minimum of one per year)

- A project is a learning activity involving investigation and solving problems by an individual or small group of students. It could consist of a task in which the student sets out to attain some goal of real personal value.
- Students should be encouraged to develop research, critical thinking and problem-solving skills.
- Projects should be tackled without close supervision, but with assessor (i.e. lecturer) guidance and support.
- Students should be given the assessment criteria before starting the project.
- Students will need to complete at least one project according to ICASS requirements. The lecturer can decide whether to give the students a range of topics to choose from or select only one topic for all the students to do.
- It is suggested that projects are dealt with in the first term.
- The project should consist of 4 to 10 handwritten pages, excluding pictures, graphs, displays, etc.

When preparing a project, the following minimum requirements should be met:
- a title page
- a table of contents
- text divided into paragraphs
- references for sources
- the text should include pictures, photos, diagrams, graphs, etc.
- the text should be presented in an acceptable way (bound or stapled)

Instrument 4: Oral presentation (minimum one per year)

Presentations allow students to demonstrate manual and/or behavioural skills. The assessment may be based on the end-result of the activity (the product) or the carrying out of the activity (the process) or a combination of both.
        Presentations can be based on a project, but also given as separate tasks or assignments. The presentation can be written or oral, but proof of the presentation must be included in the portfolio. All criteria used to assess the presentation must be discussed with the students before they start.

Day-by-day assessments: practical application

- **Simulations**

Simulations mirror actual activities or conditions. They are suitable for assessments where demonstrations and observation will provide reliable and valid results, but where, for a number of reasons, it is difficult or impractical to assess under actual conditions.

- **Scenario / Case study**

Students are presented with a real-life situation, a problem or an incident related to the learning outcome and expected to assume a particular role in articulating the position. They could draw on their own experiences, the experiences of peers or prior learning to interpret, analyse and solve problems. Solutions/recommendations related to the case study/scenario are then made and presented.

- **Oral questions**

These are mainly used to generate evidence of a student's ability to listen/sign, interpret, communicate ideas and sustain a conversation in the language of assessment. Oral questions include oral examinations, interviews, conferences and other conversations in which information is obtained about a student's learning.

- **Observations**

This is the type of assessment that is commonly used by lecturers without consciously thinking about it. Lecturers constantly observe students informally to assess their understanding and progress. They watch students as they respond to questions or as they study. The lecturer listens to students as they speak and discuss issues with others. Observation is also used extensively in performance-based assessment and other formal techniques.

- **Debates**

Topics for debates should relate to the ASs and be formulated as contentious statements. Students should be given sufficient time to research their topics and prepare their arguments. Students should not exceed a time limit of three minutes per speaker. Students engage in a formal debate in groups not larger than eight.

Grading students' work

Assessment in the FET (Colleges) will be conducted in terms of a combination of mark allocation and criterion-referenced descriptors. The following classification scheme for mark translation to descriptors has been developed for the National Certificate (Vocational) Levels 2, 3 and 4.

Grading	Descriptors	Marks%
5	Outstanding	80–100%
4	Highly competent	70–79%
3	Competent	50–69%
2	Not yet competent	40–49%
1	Not achieved	0–39%

Subject competencies have been described to distinguish the grade expectations of what students must know and be able to achieve. The descriptions for New Venture Creation are outlined in the Subject Guidelines and Assessment Guidelines for New Venture Creation.

Assessment in particular subjects

External assessment in a subject will count 50% and college-based assessment (also called internal assessment or ICASS) will count another 50% to make up the progression mark of the student. The college-based assessment component, in turn, consists of a summative component (internal examinations and standardised tests) and a formative component (i.e. assignments and tasks to develop subject skills such as monitoring and research activities, presentations, debating, numerical calculations, summarizing and memorizing).

Tests and examinations will focus on assessing knowledge and understanding. This mainly uses the application of the student's subject-specific knowledge and skills. You can use case studies, analysis and interpretation of data, critical discussions of contemporary issues or numerical calculations.

Summative assessment

The summative component of college-based assessment will require students to:
- answer objective-type questions, i.e. multiple choice, true/false, matching concepts, etc.
- write an essay or a short answer to a question
- organise relevant information clearly and coherently, using specialised vocabulary where appropriate
- ensure that writing is legible, and spelling, grammar and punctuation are accurate, so that meaning is clear.

Questions typically start with task or command words. These words indicate which skills are required when answering the question. For example If students are asked to evaluate a problem, but they only show knowledge and understanding, they will lose most of the marks for that question.

The meanings of the most frequently used task words are listed on the following page:

Knowledge and understanding	
Define	Give the exact meaning of a term or concept using words or mathematical symbols (e.g. 'Define "globalisation"'.)
Describe	Give an account (e.g. 'Describe the relevance of contracts and their legal implications in different business contexts.')
Identify	Single out from other information (e.g. 'Identify the various components of micro (internal), market and macro business environments.')
Illustrate	Use examples to explain a point (e.g. 'Illustrate by means of examples the impact and challenges of contemporary socio-economic issues on business operations.')
List	State briefly (e.g. 'List four features of effective management.')
Outline	Give a short description of the main aspects or features (e.g. 'Outline the different investment opportunities for individuals and businesses.')
State	Give or say (e.g. 'State three reasons why social responsibility activities are undertaken by businesses.')
Summarise	Bring out the main points from a complex set of data. (e.g. 'Summarise the effect that the Skills Development Act and

	the implications of skills levies for large business.')
What	Clarify a point (e.g. 'What are the main characteristics of an entrepreneur?')
Application	
Apply	Use knowledge of New Venture Creation to understand an issue or problem (e.g. 'Apply a strengths, weaknesses, opportunities and threats (SWOT) analysis to determine a viable business venture.')
Calculate	Use mathematics to work out an answer (e.g. 'Calculate the selling price of a T-shirt if five T-shirts cost R500.00 to produce and the seller aims to make a 10% profit.')
Distinguish between	Identify the characteristics that make two or more ideas, concepts, issues, etc. different (e.g. 'Distinguish between the Road Accident Fund and Unemployment Insurance Fund.')
Explain	Make clear (e.g. 'Explain the features of the micro (internal), market and macro business environments in detail.')
Suggest	Give possible reasons or ideas that are plausible but not necessarily correct. 'Suggest' may require candidates to analyse a problem and not just apply New Venture Creation knowledge (e.g. 'Suggest reasons why a business would rather train someone from within the business than recruit someone from outside the business.')
Analysis	
Analyse	Break down into constituent parts in order to be able to understand an issue or problem. Analysis involves recognising what is important, and applying knowledge and understanding of New Venture Creation (e.g. 'Analyse the degree to which a business embraces entrepreneurial qualities.')
Compare and contrast	Show similarities and differences between two or more ideas or problems (e.g. 'Compare by tabulating the extent to which a business can control and influence the business environment.')
Examine	Break down an issue or problem to understand it (e.g. 'Examine thoroughly the concept of social responsibility and its implications for both business and communities.')
Investigate	Look for evidence to explain and analyse (e.g. 'Investigate the nature of business being conducted in the area and classify it into primary, secondary and tertiary enterprises.')
Evaluation	
Assess	Analyse an economic issue or problem, and then weigh up the relative importance of different strands (e.g. 'Assess a team against the criteria for successful and collaborative team performance in a business context.')
Comment on	Invites students to make judgements based on the evidence they have presented (e.g. 'Comment on why the South African government, business and education system deem it necessary to develop an entrepreneurial culture in South Africa.')
Critically analyse	Analyse an issue/problem and weigh up the relative importance (e.g. 'Critically analyse the three management or leadership styles.')

Do you think	Invites students to give their own opinions about an issue or problem. However, marks will always be awarded for the quality of the argument and not for any individual opinions (e.g. 'Do you think it is better to invest in shares or in unit trusts?')
Discuss	Compare a number of possible views about an issue and weigh up their relative importance. A conclusion is essential (e.g. 'Discuss the relationship between the micro, market and macro business environments.')
Evaluate	Similar to discuss; to compare a number of possible views. A final judgement is essential (e.g. 'Evaluate the extent to which a business venture addresses issues such as human rights, inclusivity and the environment.')
To what extent?	Explain and analyse and then comment upon the relative importance of the arguments (e.g. 'To what extent should top management involve the rest of the employees in their business planning activities?')

Formative assessment

Formative assessment informs the lecturer and the student about the student's progress. The formative component of ICASS must include a variety of activities. For example:
- research and monitoring of relevant, contemporary economic issues
- other ongoing tasks to develop skills that are necessary for successful functioning within the subject
- creative responses to problems within the subject field
- more informal assessment of day-to-day knowledge and skills acquired through creative class tests, presentations of the previous day's work, class quizzes, etc.

The formative component should cater for the multiple intelligences (i.e. verbal-linguistic, interpersonal, intra-personal, musical-rhythmic, bodily-kinaesthetic, mathematical/logical, spatial) of students in an inclusive education context.

A **performance assessment** is a direct observation of an actual student's performance or an examination of products created. During a performance assessment, students are engaged in activities that require the demonstration of specific skills or the development of specific products. The demonstrations can take place in a controlled environment (such as laboratory or a classroom), or in a real-life environment, where the complexities faced by the students are much higher. In the latter case, the performance assessment is also called an 'authentic assessment'. Students are expected to demonstrate complex learning that integrates knowledge, skills and values in a single performance.

Characteristics of performance assessments:
- Students are expected to perform, produce, create or do something.
- The skills are those displayed by individuals outside the classroom (i.e. in society or in the workplace).
- Higher order thinking processes and problem-solving skills are required for these tasks.
- They provide opportunities for students to present and explain their work.

The following steps are suggested in developing a performance assessment:

- Clearly identify the outcome(s) to be assessed (i.e. create a clear and appropriate target for the students).
- Determine the purpose of the assessment and the use of the results.
- Design a performance task that will elicit the expected outcome(s).
- Specify the assessment criteria.
- Select and construct the storing and recording instruments(s).
- Performances include everyday teaching and learning activities such as projects, debates, assignments and speeches. When performing, students are applying their skills in a way that is integral to the teaching and learning process.

The external assessment component (50%)

External assessment is assessment that is conducted by an entity such as a provincial examining body, a national agency, or a private agency that is not directly involved with the instruction of the students. It consists of a written examination paper that is externally set, marked and moderated.

The paper may be divided as follows:

Format		
Section 1 (compulsory) **Sub-total: 50**	This section will include different types of objective questions, i.e. Q1: multiple choice Q2: short theoretical questions Q3: calculations	Total: 50
Section 2 (compulsory) **Sub-total: 150**	Four questions of 50 marks each; Students must choose three questions to do.	Total: 150

The following task words from Bloom's taxonomy provide a guide to setting questions:

Knowledge	Understanding	Application	Analysis	Synthesis	Evaluation
define	compare	adapt	categorise	combine	appraise
describe	define	compute	classify	compose	critique
identify	describe	discover	compare	create	decide
label	distinguish	draw	contrast	depict	evaluate
locate	explain	gather	deduce	design	judge
name	generalise	graph	differentiate	develop	justify
recognise	illustrate	modify	distinguish	incorporate	recommend
select	infer	operate	explain	integrate	consider
state	interpret	prepare	generalise	invent	support
memorise	match	revise	infer	organise	relate
	summarise	show	predict	plan	summarise
	rewrite	solve	relate	predict	
	paraphrase	survey	solve	produce	
	express	use	modify	structure	

Suggested guidelines for the distribution of the levels of questioning are indicated in the table on the following page:

Level of questioning	Percentage
Levels 1 and 2: Knowledge and comprehension	40%
Level 3: Application	40%
Level 4: Analysis, synthesis and evaluation	20%

The total mark obtained in the examination paper is then converted into an appropriate rating and code on the four-point scale.

5.   Assessment tools (rubrics and checklists)

Rubrics are a combination of rating codes and descriptions of standard. They consist of a hierarchy of standards with benchmarks that describe the range of acceptable performance in each code band. Rubrics require lecturers to know exactly what is required by the outcome. Rubrics can be holistic, giving a global picture of the standard required, or analytic, giving a clear picture of the distinct features that make up the criteria, or can combine both.

Holistic rubrics score the overall process, while analytic rubrics score the individual parts. It is important to note the following:

• The student is only assessed once for each criterion within a rubric.
• The comments make the moderation process easier.
• Rubrics can be used individually or combined with others.
• Rubrics may be joined together for ease of marking.
• Lecturers are encouraged to work in clusters and setting up collaborative rubrics would bring about comparable standards.

The following steps may help you in drawing up a rubric:

Step 1:   Examine the SO and AS that describes the task.
Step 2:   Specify the skills, knowledge and attitudes to be evaluated.
Step 3:   Identify the observable attributes.
Step 4:   Identify the attributes that you do not wish to see.

Step 5:   Brainstorm the characteristics that describe each attribute and how they can be described so that they can be classified into average, above average and below average.
Step 6:   Write descriptions for excellent and poor performances.
Step 7:   Write descriptions for other levels.
Step 8:   Collect samples of work that represent each level.

The following section includes 19 sample rubrics and checklists that can be used and adapted for particular activities. These are referred to throughout the Lecturer's Guide.

Rubric 1: Standard rubric

Criteria	Outstanding (80–100%)	Highly competent (70–79%)	Competent (50–69%)	Not yet competent (40–49%)	Not achieved (0–39%)
CONTENT Range Coverage Relevance					
CONTEXT Command word requirements					
SKILLS and VALUES Skills Values					
MECHANICS Subject terms Language Format					

The following checklist may be used to evaluate a rubric:

	Yes	No
Does the rubric emphasise the most important content and skills of the SO/AS/LO?		
Are the criteria used in the rubric of appropriate importance?		
Are there sufficient levels of performance to discriminate between the quality of students and work?		
Are the levels clearly described in terms of performance?		
Do the levels accommodate students' diversity?		
Does the rubric distinguish between content and skills as well as the communication thereof?		
Does the rubric contribute to an efficient marking process?		
Was a careful decision made between using marks and level descriptors or letter symbols?		
Does the rubric offer appropriate guidance to the students?		

Rubric 2: Reflective self-assessment checklist

Individual projects are very personal and more difficult to assess. They are also process-orientated rather than product-orientated.

Amount of time spent on project (time scale to be determined)	less than	1	2	3	4	5	or more
Number of family members spoken to							
Do you feel you learned anything about yourself when doing this project?	yes			no			
Comments:							
Do you feel the project helped you understand yourself?	yes			no			
Comments:							
Did you think you expressed this information about yourself in an interesting and exciting way?	yes			no			
Comments:							
Do you think you put a lot of effort into this project?	yes			no			

Group work and group assessment

Teamwork is an important part of learning skills and constructing knowledge. Sharing the workload and being aware of personal contributions to the community is important for every student. In a group, the roles and responsibilities are essential to the success of the activity. Evaluating students in different roles assists in their awareness of management processes and effective co-ordination. The lecturer or the students may use this instrument for evaluating each member of the group or to evaluate each other's contributions. This rubric should have space for comments on how the students in the group experience group work, and how they are able to improve or change the roles they play within the group.

Roles within the group should be rotated to allow each student to develop or become aware of their different capabilities.

TEAM: Together   **E**veryone   **A**chieves   **M**ore

Different group/team roles include:
- timekeeper
- team leader/chairperson/manager
- resources manager
- scribe/note-taker/record-keeper
- reporter
- motivator
- assessor
- peace-maker.

When students work in groups to tackle complex activities and more demanding tasks, efficient organisation is crucial. The process can be helped if different students take on different roles. The lecturer and students can decide which roles are most appropriate in terms of the activity/task. Initially the lecturer can assign these roles, but once the students are familiar with the process, they can take responsibility for assigning these roles within their groups. This needs to be monitored to ensure that all students have an opportunity to play different roles and exercise the different skills involved. A rubric should be devised that clearly sets out the different roles, the criteria for each role and the standards that will be applied. An example of a rubric that has been designed to assess the different roles and the skills involved is shown below.

Each member of the group can assess all the roles except the one that he or she performed. The mark for each criterion within a role can be added to give a total score for the role.

Students can also decide which roles are required for a particular activity, mark them off and assign the roles before continuing with the activity.

	Voice monitor		**Time-keeper**
	Motivator		**Record-keeper**
	Assessor		**Chairperson/manager**
	Peace-maker		**Reporter**

Rubric 3: Assessment of group skills

Group name/Number:…………………………..

Names:……..………………………………………………………………………………………

……………………………………………………………………..…...................

Did our group members:	YES	NO	Comment
Listen to each other?			
Talk about the task?			
Co-operate within the group?			
Suggest good ideas?			
Encourage each other?			
Achieve the outcomes?			

What went well?

………………………………………………………………………………………………

………………………………………………………………………………………………

………………………………………………………………………………………………

What could we have done better?

…………………………………………………………….……………………….……..

……………………………………………………………………………………………..

……………………………………………………………………………………………..

Signed:…………………………………………………………………………………

……………………………………………………………………………………………..

……………………………………………………………………………………………..

Date …………………………...........

Rubric 4: Assessment of co-operative group skills (1)

TASK SKILLS	Student 1 *	Student 2 *	Student 3 *	Student 4 *	Student 5 *
Gives ideas					
Asks questions					
Stays on task					
Follows directions					
Checks the understanding of others					
Gets group back on track					
SOCIAL SKILLS					
Encourages others					
Explains ideas					
Discusses					
Listens well					
Resolves conflict					
Praises others					

- * Add the names of each student in the group under 'Student' and enter a tick ✓ (Yes) or an x (No) under the name of each student for each of the criteria.

Rubric 5: Assessment of co-operative group skills (2)

Process	Everyone took part equally.	Not yet	1	2	3	4	5	Yes
	The group held a meeting to plan.	Not yet	1	2	3	4	5	Yes
	Each student did what they were supposed to do.	Not yet	1	2	3	4	5	Yes
	Everyone in the group feels happy about the project.	Not yet	1	2	3	4	5	Yes
	The project offers a lot of information.	Not yet	1	2	3	4	5	Yes
	The group explored the following sources: college library, public library, Internet, people, newspapers, clinics, advice offices, other.	Give one mark for each source explored (up to 5 marks):						
Product	The information is set out in a way that is clearly understood.	Not yet	1	2	3	4	5	Yes
	There are interesting drawings and illustrations.	Not yet	1	2	3	4	5	Yes
	Written information is easy to read and to follow; ideas are described well.	Not yet	1	2	3	4	5	Yes
	The ideas are shown in an unusual and interesting way.	Not yet	1	2	3	4	5	Yes
	There are a lot of the students' own ideas – not only copied materials.	Not yet	1	2	3	4	5	Yes
	Information is presented clearly; you know what the message is.	Not yet	1	2	3	4	5	Yes
Presentation	The group uses drama, speaking, music, singing, pictures, objects to help the presentation.	Give 2 marks for each resource used (up to 6 marks):						
	All group members took part in the presentation.	Not yet	1	2	3	4	5	Yes
	The presentation is interesting and unusual.	Not yet	1	2	3	4	5	Yes
	You can hear what everyone is saying.	Not yet	1	2	3	4	5	Yes

Rubric 6: Assessment of a research project

The following marking grid could be used where marks allocated are circled according to the sub-criteria (below the grid) and are then transferred to this grid by the different people assessing the project.

Criteria	Mark awarded			
	Self	Peer/group	Consensus	Lecturer
1. Planning				
2. Quality of research				
3. Continuous collection of information and material				
4. Originality/Creativity				
5. Quality of contents				
6. Technical quality				
7. Oral presentation				
8. Individual / group role				
Converted to				

General guidelines for awarding marks/rating

Rating	Descriptor
5	Outstanding
4	Highly competent: exceeds the requirement
3	Competent: meets the requirement
2	Not yet competent: student needs support
1	Not achieved: made very little effort, needs substantial support

1. Planning

Rating	Descriptor
5	Very practicable planning schedule, independently drawn up by student
4	Very good, practicable planning schedule, with a few minor adjustments by educator needed
3	Good planning schedule, with a number of small adjustments by educator needed
2	Planning schedule not totally practicable – a substantial number of adjustments needed
1	Planning schedule totally impracticable – totally new planning necessary

2. Quality of research

Rating	Descriptor
5	Wide variety of sources used
4	More than required number of sources used
3	Adequate number of sources used
2	Less than adequate number of sources used
1	Only one or no resources used

3. Continuous collection of information and material

Rating	Descriptor
5	A lot of information collected continuously / submitted before due dates
4	More than adequate information collected / submitted before/on due dates
3	Adequate information collected continuously / submitted on due dates
2	Less than adequate information collected / some due dates missed
1	Very little information collected / seldom met due dates

4. Originality/creativity

Rating	Descriptor
5	Unique presentation of extremely high quality
4	Original presentation – however, based upon existing ideas
3	Standard presentation – content is relevant and interesting
2	Requirements have been met, and no more
1	Content entirely / almost entirely copied directly from sources; no effort made

5. Quality of content

Rating	Descriptor
5	In-depth presentation pertaining to real-world practice / evidence is shown of insight into relationship between subject theory and real-world practice
4	Relevant and well-researched presentation – student demonstrates very good insight
3	Relevant content shows good insight, area of research well covered
2	Part of content is relevant – partly copied directly from sources; insight lacking
1	Very little effort made – content largely copied directly from sources; content only slightly in line with topic

6. Technical quality

Rating	Descriptor
5	Evidence of pride and very hard work – impressive final product
4	Very good presentation – full use of available sources/technology
3	Good final project
2	Minimal effort made; presentation only just acceptable; room for improvement
1	Very little trouble taken; untidy, shabby presentation

Rubric 7: Assessment of analytic skills

	1 Not achieved	2 Not yet competent	3 Competent	4 Highly competent	5 Outstanding
Knowledge and under-standing	Demonstrates no under-standing of the concepts, principles and theories required Demonstrates no command of relevant factual knowledge Shows no understanding of composition and structure	Demonstrates very little understanding of simple concepts, principles and theories Demonstrates very little command of relevant factual knowledge Shows very little understanding of composition and structure	Demonstrates a general understanding of ordinary concepts, principles and theories Demonstrates general command relevant of factual knowledge S hows general understanding of composition and structure	Demonstrates a significant understanding of major concepts, principles and theories Demonstrates a significant command of relevant factual knowledge Shows a significant understanding of composition and structure	Demonstrates comprehensive understanding of major concepts, principles and theories Demonstrates comprehensive command of relevant factual knowledge Shows comprehensive significant understanding of composition and structure
Context	Shows no ability to mould content in the required context	Shows little ability to mould content in the required context	Shows general ability to mould content in the required context	Shows significant ability to mould content in the required context	Shows comprehensive ability to mould content in the required context
Skills	Shows no ability to construct tables and present data graphically Cannot make interpretations based on data and other conclusions	Shows some ability to construct tables and present data graphically Makes inadequate and limited interpretations based on data and other conclusions	Shows complete ability to construct tables and present data graphically Uses a variety of means to analyse and present data and draws valid conclusions		
Attitudes/ values	Demonstrates wrong attitudes/ values	Demonstrates appropriate attitudes/ values adequately			
Communi-cation	No ability to apply linguistic principles Lacks business studies vocabulary.	Makes errors in grammar and paraphrasing. Uses business studies terms but lacks the ability to communicate clearly	Uses grammar and para-phrasing.correctly Uses standard business studies terminology in the correct context		

Rubric 8: Assessment of oral presentations (1)

The following example can be adapted, depending on the specific task being assessed. The relevant numbers should be circled.

Skills areas	Outstand-ing	Highly competent	Competent	Not yet competent	Not achieved
Location	5	4	3	2	1
Appeal	5	4	3	2	1
Neatness/tidiness	5	4	3	2	1
Communication	5	4	3	2	1
Variety	5	4	3	2	1
Appropriateness	5	4	3	2	1
Content	5	4	3	2	1
Technique	5	4	3	2	1
Total score					
Total	.... / 40			.........%	
Comments:					

Rubric 9: Assessment of research processes

Skills areas	5 Outstanding	4 Highly competent	3 Competent	2 Not yet competent	1 Not achieved
Observation					
Recording					
Inference					
Investigative					
Evaluation					
Marks					
Total					
Comments:					

Observation skills are demonstrated when students are able to:
- match, classify and identify items
- interpret e.g. drawings, diagrams, graphs, figures and written passages
- observe features and characteristics.

Recording skills are demonstrated when students are able to:
- record information exposed to by reading, observation and interaction
- summarise written and/or spoken and/or demonstrated or acted information
- present data graphically, i.e. draw curves and other presentations e.g. charts and histograms, scale axes and label appropriate components meaningfully.

Skills of inference are demonstrated when students are able to:
- calculate data correctly and accurately e.g. averages
- percentages, and fractions
- recognise patterns and trends in raw or ordered data, extract information from results, interpolate and extrapolate
- distinguish between observations (statements describing what has been seen, heard, etc., whether qualitative or quantitative) or from inferences
- make plausible generalisations from observations.

Investigative skills are demonstrated when students are able to:
- identify aspects of a problem that can be investigated
- formulate the aim and a general strategy for an investigation
- write a research outline, and collect relevant data and other information
- make valid observations, deductions and interpretations, and argue logically
- proof or reject hypotheses convincingly
- show a clear understanding of the three basic methods used in research.

Evaluation of processes are demonstrated when students are able to:
- identify weaknesses and strong points (e.g. in arguments and policies)
- recognise that results may be incomplete or inconclusive
- formulate constructive criticisms and appraisals.

Rubric 10: Assessment of oral presentations (2)

ASSESSMENT CRITERIA		ACHIEVEMENT: SUGGESTED MARK ALLOCATION					STUDENTS							
							1	2	3	4	5	6	7	8
		Factor by	5	4	3	2	1							
CONTENT	**Development**: Structure; Organisation; Support material	x 5 = /20	Exceptionally well structured, organised and has comprehensive support material	Generally well structured and organised and has sufficient support material	Structure and organisation needs attention and support material is evident	Poorly structured with very little support material	No structure, no organisation skills evident and no support material								
	Effectiveness: Purpose; Interest; Reception	x 3 = /15		Has significant purpose, hold interest and is well received by audience	Has purpose, holds interest and audience is receptive	Lacking in purpose, hold interest and is received by audience to a limited extent	No purpose, does not hold interest and is not well received by audience								
	Value: Ideas; Logic; Originality	x 3 = /15		Significant new ideas, ability to think logically and originality.	Some new ideas, ability to think logically and some originality.	One or two new ideas, ability to think logically and little originality.	No thought or logic evident. No originality.								
	Content sub-total	**50**													
DELIVERY	**Physical**: Appearance; Body language	x 5 = /10			Has presence and uses the correct body language	Has very little presence and body language needs attention	Has no presence and uses incorrect body language								
	Voice: Flexibility; Volume	x 5 = /10			Has presence and uses the correct body language	Demonstrates little presence body language needs attention	Has no presence; uses incorrect body language								

					Has presence and uses the correct body language	Has very little presence and body language needs attention	Has no presence and uses incorrect body language								
	Manner: Directness; Assurance; Enthusiasm	x 5 = /10														
	Delivery sub-total	**30**														
COMMUNICATION	**Appropriatene ss**: To purpose and audience	x 5 = /10			Audience and purpose taken into account	Very little awareness of audience and purpose	No awareness of the audience or purpose shown								
	Correctness: Grammar; Punctuation; Word selection	x 5 = /10			Correct use of grammar, punctuation and correct word selection	Grammar partially correct and some word selection incorrect	Incorrect use of grammar and word selection								
	Language sub-total	**20**														
TOTAL MARKS:		**/100**														

Rubric 11: Self-assessment checklist for an oral presentation

Did you introduce yourself to your audience?	Yes	No
Did you arouse the interest of your audience?	Yes	No
Did you begin with a clear introduction of your topic with an overview of what you would cover?	Yes	No
Were your ideas presented clearly with a logical flow from one point to the next?	Yes	No
Did you conclude by summing up what you had covered?	Yes	No
Were your visual aids clear and easy to read?	Yes	No
Did you have good control of your material with everything in the correct order?	Yes	No
Did you give the right amount of facts and figures? Could your audience understand them?	Yes	No
Did you avoid reading too much from your notes?	Yes	No
Did you look comfortable and relaxed?	Yes	No
Did you display any nervous gestures, such as hand-waving or pen-clicking?	Yes	No
Did you look and sound interested and enthusiastic?	Yes	No
Was your voice loud enough to be heard?	Yes	No
Did you speak too quickly or too slowly?	Yes	No
Were there any words you had problems pronouncing?	Yes	No
Did you get your timing right? Too long? Too short?	Yes	No
Did you allow time for questions, and invite your audience to make comments (rather than just asking, 'any questions'')?	Yes	No
Did you provide handouts for people to take away?	Yes	No

From: http://slc.otago.ac.nz/studyskills/ch5sec4.asp

Rubric 12: Assessment of a graphic presentation

The following rubric could be used to assess graphs (e.g. equilibrium, supply and demand graphs):

Criteria	Range			Comments
	0	1	2	Comments
Correct type of graph (bar/histogram/line/pie chart)	Not correct type	Correct type		
Suitable heading describing variables	Not present	Incomplete	Complete	
Independent variable on x-axis (horizontal)	Not present	Present		
Suitable scale on x-axis (horizontal)	Incorrect	Correct		
Labelling x-axis (horizontal)	Incorrect	Correct		
Units for independent variable on x-axis (horizontal)	Incorrect	Correct		
Dependent variable on y-axis (vertical)	Not present	Present		
Suitable scale on y-axis (vertical)	Incorrect	Correct		
Labelling y-axis (vertical)	Incorrect	Correct		
Units for independent variable on y-axis (vertical)	Incorrect	Correct		
Plotting points (check any three)	All incorrect	1–2 correct	All correct	
Neatness (joining points)	Untidy	Tidy		
Size of graph	Small, unclear	Large, clear		

Rubric 13: Assessment of written presentations

Students are often expected to write essays in New Venture Creation. Each essay topic should assess factual content, the ability to select relevant facts and link these to form a coherent argument, and the ability to express these ideas clearly.

The following rubric is a holistic one to assess the development of essay-writing skills:

Criteria	5 Excellent critical concept analysis; writing very focused	4 Good critical concept analysis; focused work	3 More descriptive than critical; analysis is vague in places	2 Completely descriptive, superficial, lacking in detail, missing the focus of the topic	1 Very superficial disorganised, lacking insight	Comment
Creative NVC ideas used for topic and content						
Topic or theme adhered to throughout the writing						
Clear thought sequence and logic						
Correct use of subject concepts and subject specific words						
Concise, brief, focused sentences						

Rubric 14: Assessment of attitudes and values

5	**Outstanding** Comprehensive understanding and implementation of all instructions; consistently produces exemplary and neat work. Exceptionally polite and respectful. Participates with enthusiasm, listens well; does more work than expected. Sets an excellent example and commands others to behave well. Can confidently/with conviction express opinions, even against popular opinion.
4	**Highly competent / Exceeds the requirements** Understands and implements all instructions; can be depended upon to produce neat/thorough work. Respectful towards peers and others. Sets a good example and encourages others to behave. Regularly shows interest; asks questions and show a willingness to learn. Can express opinions even against popular opinion.
3	**Competent / Meets the requirements** Follows instructions regularly; makes an effort to produce neat work. Shows acceptable level of respect and courtesy. Well behaved and not disruptive. Can answer questions, even if unsure; expresses opinions.
2	**Not yet competent / Does not meet the requirement – needs support** Instructions often not followed; work untidy and rushed. Shows respect towards some; disrespectful to others. Sometimes disrupts and distracts; need to focus more on work. Only does the minimum work required; erratic interest shown. Hesitant to express self in class; needs to be drawn out.
1	**Not achieved / Makes very little effort** Does not follow instructions; work always untidy and incomplete. Ill-mannered; sometimes rude. Disruptive and distracts others. Shows very little interest; passive re schoolwork. Seems shy/reluctant to answer questions; never expresses an opinion.

Mark allocation	Self		Educator		Final mark	
		5		5		5

Rubric 15: Assessment of poster communication skills

Criteria	Range			
	0	1	2	Comments
Content				
Main points	Points irrelevant	Some points irrelevant	Main points selected	
Facts/concepts	Facts incorrect	Some facts incorrect	All facts correct	
Expression of facts	Poorly expressed	Partially expressed	Clearly expressed	
Presentation				
Size (e.g. A3)	Incorrect size	Correct size		
Headings	Not descriptive	Partially descriptive	Descriptive	
Font/print size	All too small	Some large enough	Large enough to read at one metre	
Organisation/lay out	Organisation muddled	Organisation mainly clear and logical	Organisation clear and logical	
Use of colour	Poor	Good	Very good	
Public appeal	Not eye-catching	Eye-catching	Very eye-catching	
Personal information	Not included	Included	More than required	
Marks				**Total: _____/ 30**

Rubric 16: Assessment of interview skills

Criteria	Performance indicator		
	0	**1**	**Comments**
Prior research knowledge	Not visible	Visible	
Suitable environment/conditions	Not considered	Considered	
Comfortable voice, tone and pitch	Too loud/too soft	Appropriate	
Body language and manner of interviewer	Not acceptable	Acceptable	
Pacing of interactions/interview	Too fast/too slow	Appropriate	
Focus of questions asked	Not focused on the topic	Focused on the topic	
Clarity of questions asked	Not understandable/ clear to the person being interviewed	Understandable /clear to the person being interviewed	
Value to community	Not obtained through the questions	Obtained through the questions	
Written/oral report of interview	Not brief, focused and integrated	Brief, focused and integrated	

Rubric 17: Assessment of mind map construction

Criteria	Range				
	5 Outstanding	4 Highly competent	3 Competent	2 Not yet competent	1 Not achieved
Use of concepts/key words	All correct	1–2 errors	3–4 errors	5–6 errors	More than 6 errors
Use of linking words	All correct	1–2 errors	3–4 errors	5–6 errors	More than 6 errors
Layout and spatial organisation	Excellent	Clearly laid out	Layout good, but sometimes not clear	Cramped and unclear	Too small and cramped
Use of highlighting and focal points	Colours used appropriately and creatively	Colours used appropriately	Colours used, but not always appropriately	Little use of colour	Colours not used
Neatness	Extremely neat	Very neat	Neat	Untidy in places	Untidy

Comments:

Total mark: _____/25

Rubric 18: Assessment of questionnaire design and conducting a survey

Criteria	Range				
	5 Outstanding	4 Highly competent	3 Competent	2 Not yet competent	1 Not achieved
Questionnaire design					
Clarity and relevance of questions	Exceptionally clear and relevant	Clear and relevant	Mostly clear and relevant	Sometimes not clear or relevant	Confusing and irrelevant
Brevity and focus of questionnaire	Exactly the right number of focussed questions for purpose	Sufficient number of focussed questions	Mostly focussed, but some repetition	Too many or too few questions	Too long/too short
Conducting survey					
Recording of responses	Insightful and detailed	Clear and accurate	Sufficient to draw conclusions	Sometimes difficult to understand	Unclear – unable to draw conclusions
Sensitivity to interviewee (gender/age/ race/disability)	Shows exceptional sensitivity and awareness	Shows sufficient sensitivity and awareness	Shows adequate sensitivity and awareness	Shows little sensitivity and awareness	Shows no sensitivity or awareness
Sample (sufficient responses)	More responses than basic requirement	Sufficient number of responses	Meets minimum require-ments	Insufficient number of responses	Too few responses to draw any conclusions
Comments:

Total mark: _____/25 | | | | | |

Rubric 19: Evidence of portfolio assessment

Students should regularly look through the written assignments in their portfolios and reflect upon the changes they see over a period of time.

Name:	Grade:
Question	**Response**
What do you know now that you did not know before?	
What can you do better now?	
What improvements would you still like to make?	
Write a short paragraph reflecting on your progress.	

Rubric 20: Monitoring and managing assessment

The table below will assist you in monitoring and managing how often you use the variety of methods, tools and techniques of assessment.

Who did the assessment?										
Self-assessment										
Peer assessment										
Group assessment										
Lecturer assessment										
Other										
What evidence did the student produce?										
Assignments										
Collages										
Conferencing										
Constructions										
Demonstrations										
Drama										
Exhibitions										
Game designs										
Graphs/drawings										
Interviews										
Mind-mapping										
Model-making										
Panel discussions										
Portfolios										
Practical presentations										
Project										
Questionnaires										
Research projects										
Role-plays										
Rubric										
Scenarios										
Simulations										
Survey/debates										
Tests										
Worksheet										
Written presentation (e.g. essays/reports)										

Office Practice level 2 assessment guidelines

1. topics that form part of the internal assessment for the PoE

No of units	Assessment	Coverage
8	Formal written tests	1 or more completed topics
2	Internal written exam	All completed topics
14	Practical assessments	Must cover the related subject outcomes: SIM

2. specifications for the external assessment - level 2

Integrated Summative Assessment Task (ISAT)

A compulsory component of EASS is the **Integrated Summative Assessment Task (ISAT)**, which is a major assessment task that draws on the student's cumulative learning achieved throughout the full year. The task requires ***integrated application of competence*** and is executed and recorded in compliance with assessment conditions.

(Notes: Two possible approaches to the ISAT may be applied as follows:

The students could be assigned a task at the beginning of the year, which they will have to complete in various phases in the year to obtain part assessment. The final assessment is made at the end of the year upon completion of the task.
OR

The other option is that students will have achieved the competencies through the year but the competencies will be assessed cumulatively in a single assessment/exam session at the end of the year.

The ISAT will be set by the externally appointed examiner and be conveyed to colleges within the first quarter of each year. The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.

National examination

A formal theory examination is conducted in October/November each year by means of a papers set externally and marked and moderated externally.   The ff. distribution of cognitive application should be followed:

National examination

A formal theory examination is conducted in October/November each year by means of a paper/s set internally and marked and moderated internally.   The examination will be structured as follows:

Level 2	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
	40%	40%	20%

The ff guidelines are offered for the setting of the Office Practice Level 2 exam:

Nature of paper   : External
Number of papers   : 1
Duration   : 2 hours each
Total mark allocation   : 150 marks
Number of sections   : 2 sections
Compulsory sections   : Section A and B
Total number of questions

Mark allocation per question

Section A: Compulsory (must cover all Topics)
2 questions of 25 marks each, covering short questions, eg. True/false, leave out words, monkey-puzzle, etc.
Total mark: 50 marks

Section B: 100 marks
Question 1:   Operate and take care of equipment   30 marks
Question 2:   Receive, distribute and dispatch mail   20 marks
Question 3:   Create evidence and maintain confidentiality 20 marks
Question 4:   Maintain the reception area   20 marks

Total marks: 100 marks

3. assessment guidelines
Topic 1:   <u>Maintain the reception area</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Maintain reception area	The signing in and out of visitors is implemented	• The visitor cards and permits are issued and the displaying thereof is explained. • Firearms are handed in by visitors where required. • Visitors roaming the premises are to be validated when required.	Practical exercises SIM, E-learning
	Maintain a clean and safe reception area according to organisational standards	• Housekeeping standards are listed and explained according to organisational requirements. • Housekeeping standards	

		• are implemented within agreed time frames. • Reception services are not disrupted while housekeeping activities are undertaken	
	Create a presentable reception area.	• Corporate image/display are related to create presentable reception area. • Display area is kept neat, tidy and clean at all times (where applicable) • Constant stock of company brochures for distribution is maintained (where applicable.	

Topic 2: <u>**Customer enquiries in an office setting**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Process incoming telephone calls (include customer enquiries)	Receive visitors in accordance with organisational requirements. .	• Visitors are acknowledged and greeted according to organisational requirements. • A comfort rapport with visitors is established. • A professional appearance is projected at all times. • Visitor's requirements are verified as per organisational requirements	Practical exercises SIM
	Process visitor's requirements according to organisational procedures.	• Visitors are consulted in a professional manner. • Person's reason for visiting are established. • If information is sought, the	

		visitor's equity is attended to promptly. • Estimated time/waiting period is conveyed to the client. • Documents/deliveries are documented and dispatched as per oganisational requirements.	
	Direct visitors according to organisational requirements	• Visitors are directed to organise requirements. • The relevant party is notified of visitors arrival. • Visitors are given clear directions to the relevant area within the workplace. • Department and security procedures for visitors are adhered to.	
		•	

Topic 3: <u>Receive, consult and direct visitors in a reception area</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Attend to customer enquiries in an office setting	Greet a customer and identify his/her need or problem	• The customer is greeted and courteously in accordance with established procedures. • Additional information to clarify the need is requested and obtained form the customer. • The customer's need is identified and if necessary reflected back to the	Practical exercise E-learning, SIM

		customer to obtain clarity. • Enquiries of a semi-routine and predictable nature are resolved by applying a known procedure.	
	Attend to customer telephone, facsimile and electronic request	• . The query is answered clearly, accurate, confident and objectively within a limited range of established context. • The request information is supplied or the request refused politely, for reasons for the declination. • Details of customers request are recorded following established and familiar procedures that include but are limited to computerised spreadsheets and/or log books. • The main details of the enquiry are noted and the entry is checked for accuracy with the caller. • The call is concluded in accordance with established and familiar procedures.	
	Refer a customer's request	• Reasons for the delay or non-availability of assistance are explained following established procedures. • Enquiries of an	

		unpredictable nature that be referred to experienced staff are identified and acted upon in accordance with should established procedures. • The policy for dealing with unusual problems or queries is known and applied in cases where the problem falls outside of familiar context. • An agreement is reached with the customer on the follow-up actions.	
	Respond to customer face-to-face and on the telephone	• . The customer complaint a query is acknowledged in accordance with established procedures. • Accurate and relevant information needed to deal with the query is obtained following familiar procedure. • Complaints and promises made to the customer are communicated promptly to senior staff for information and verification. • Feedback regarding the progress of the complaint is given to the customer following consultation and with a more senior staff member. • The call is closed using familiar procedures.	

		• The interaction is recorded as required by company policy.	

Topic 4: <u>**Employ effective telephone etiquette**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Receive, consult and direct visitors in a reception area.	Employ effective telephone etiquette	• Telephone etiquette and answering procedures are explained. • The factors that hinder communication process are identified and explained. • Calls are handled with discretion and confidentiality. • Caller is put on hold when not conversing directly with the caller. • A caller on hold is frequently consulted to establish whether he or she wishes to remain on hold.	Practical exercise SIM
	Answer telephone according to organisational standards	• Telephone is answered promptly. • Telephone is answered according to standard operating procedures. • Caller is greeted according to organisational requirements. • Relevant caller information is acquired during initial interaction	

	Process incoming calls according to organisational standards	- Call is redirected as appropriate. - Multiple lines and holding techniques are handled using correct technique. - Calls are screened as per standard operating procedures. - Message is taken and transmitted if required / requested according to organisational requirements. - Further assistance is obtained from an appropriate source, if required.	
	Process outgoing calls in accordance with organisational requirements	- Information and documentation required for the call are obtained and prepared - Outgoing call is dialed using the correct number. - Purpose of the call is stated clearly and according to organisational procedures. - Resulting actions from calls are recorded. - Messages are left, if required / requested according to organisational requirements	

Topic 5:   Operate and take care of equipment

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities

Operate and take care of equipment in an office environment.	Follow instructions to operate four different items of office equipment.	• Instructions for operating equipment are understood and followed responsibly with due regard for safety. • Predictable problems or faults that occur on a routine basis are identified and solved using known solutions. • Persistent and non-routine problems/faults that require wide ranging technical skills are recognised and reported to the relevant authority	Projects, Demonstrations E-learning, SIM
	Maintain equipment in a clean and working condition	• Equipment is cleaned and kept in good repair and consumable items are replaced according to familiar procedures for the particular machine. • The dangers of working with electricity are known and understood and safety precautions are applied when cleaning equipment. • Discarded items are disposed of safely and appropriately. • The equipment and immediate work area are left in a clean and tidy condition. • Recyclable components are stored safely and	

		dispatched according to company policy.	
	Monitor and request equipment consumables	• The quantity of consumables needed per item of equipment on an average day is known. • Equipment consumables are monitored and low levels reported using familiar procedures. • Equipment consumables are requested in accordance with established procedures. • Equipment consumables are handled correctly and stored securely in accordance with established and familiar procedures. • Equipment consumables are used in expiry date sequence, the oldest ones first. • Equipment consumable records are kept up-to-date, legible and accurate.	

Topic 6:   Receive, distribute and dispatch mail

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Receive, distribute and dispatch mail in an office	Receive and sort mail.	• Mail is received according to established procedures.	Demonstrations

environment.		• Mail is sorted according to established procedures within an appropriate time scale. • The importance of maintaining confidentiality and security of documentation in terms of receiving and sorting mail is known and understood and confidentiality is strictly observed in terms of a mailroom code of conduct.	SIM
	Distribute and dispatch mail	• Mail is distributed internally to relevant persons within an agreed time scale. • Possible reasons for unnecessary delays in distribution are explained with examples of the consequences when there are unavoidable are ruptions. • Procedures for dispatching mail externally are known and understood in accordance with established procedures and Post Office requirements. • Enclosures are securely attached and any missing items are reported using a familiar procedure. • Mail is legibly and correctly addressed for internal and	

		external distribution. • Mail is dispatched externally by Post Office or courier service within agreed mail deadlines	
	Know and understand the importance of the process followed in a mailroom (and why it is necessary to create evidence.)	• The reasons for stamping incoming mail are known and understood and mail is stamped correctly in accordance with established requirements. • Different ways of recording used for different tasks and the reason for creating the record are understood in terms of different departmental requirements. • The legal implications of neglecting to comply with mailroom procedures are understood in terms of own work performance and possible cost to company. • The concept that errors and mistakes cost money is understood, ways of avoiding unnecessary errors are described and own performance is considered with a view to improvement.	

Topic 7:   <u>**Create evidence and maintain confidentiality**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Identify and maintain the types of records required in own industry and understand why it is necessary to create evidence and maintain confidentiality.	Explain why companies record and keep information	• The reason for recording information is explained with reference to an actual document used in a selected business sector. • Five examples are listed of the type of information contained in records in one's own business sector. • Three methods of creating records are named that use different types of technology. • The purpose for which a record is used, is described for three different roles in one's own organisation.	Projects, Tasks Classroom
	Name and describe the type of records that are specific to a contract in a selected business sector.	• The type of information contained in a contract, agreement or quotation is explained with reference to a named document. • The purpose of maintaining a record of contracts, agreements and quotations is described with reference to specific case studies. • The importance of recording client specific details is known and explained with examples from a selected business sector.	

		• The purpose of recording changes to contracts, agreements and quotations is explained with reference to three different circumstances.	
	Locate and provide records to users on request	• Suitable paper or electronic filing systems are used to locate the required record. • Requested data is located, accessed and retrieved within agreed organisational service levels. • The reasons why confidential records are given only to authorised people are known and can be explained and the implications of releasing information to unauthorised persons are understood in • terms of risk to company. • A copy of a record is made and provided as requested, the request and compliance are noted and the original documents are returned to the correct location. • The confidentiality of records is maintained at all times and security procedures are explained in simple terms. • Securing confidential	

		information	
	Maintain confidentiality of customer and company information.	• Violations of company procedures relating to the confidentiality of information are recognised and reported following established procedures. • Information classified as confidential is recognised as such and is disclosed only to approved personnel. • Company and legal requirements are known and understood and all outputs / inputs to the storage system conform to established procedures. • Situations where colleagues do not comply with security and confidentiality procedures are identified and immediately reported to the appropriate authority. • All work activities are carried out according to the Code of Conduct and within the requirements of an organisation's security procedures.	

Topic: 8   File a variety of documents in existing systems.

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities

File a variety of documents in existing systems	Store information using an existing storage system.	• Paper based documentation is classified, sorted and recorded according to established requirements. • Information is stored in the correct location and sequence and the student understands the effect that misfiled documentation has on an organisation. • Documents are stored in a manner that ensures that they are undamaged, safe and accessible when required. • Information is classified and cross-referenced accurately Classification uncertainties are referred to an appropriate authority. • The method of classification and cross-referencing is understood and the problems that result from unconventional classification and cross-referencing are explained in a familiar context. • The process for locating is current, accurate and in a prescribed format according to the organisation's procedures for archiving. The student	Demonstrations, Practical exercises SIM, E-learning

		understands the implications for productivity when an item cannot be located. • Source and gather filing documentation. • Electronic file is created and labelled according to requirements. • Electronic documentation is filed according to organisational requirements. • Filing is completed within organisational time frames and standards. • Classification uncertainties are referred to an appropriate authority. • All materials are classified, sorted and stored without damage in safe and secure manner.	
	Retrieve information from an existing storage system.	• Required information is promptly located, obtained, copied and dispatched to the correct person or location. • Delays in the supply of information are communicated and the reason for delay is explained politely. • Information retrieved is correctly recorded in order to track all files.	

		• Missing or overdue items are identified and correct procedures followed to locate them.	
	Store valuable documentation and reference materials securely.	• The process for securing valuable items and for maintaining that security is known and followed meticulously. • Reasons for security procedures are explained with examples of the effects on an organisation when there is a breach of security. • Security risks are identified and corrected within own area of authority. • Violations of security are recognized and reported following the familiar and established procedures	

Office Practice level 2 – 40 week plan

We ek Topic	SO/ LO Ref	SUBJECT & LEARNING OUTCOMES	Hrs	ASSESSMENT TASKS (PoE)
1	Registration/induction			5	
2	Registration/induction			5	
3 to 6	1: Maintain the Reception Area	SO1	Describe and apply security procedures according to organisational requirements.	13	Discuss what security precautions you are aware of and explain how visitor cards and permits are issued and displayed. Group. Establish firearm handling procedures and write a set of guidelines on them for your organisation. Individual. Role-play the procedures for receiving a visitor with a firearm. Group.
		LO1.1	Explain how visitor cards and permits are issued and displayed.	1	
		LO1.2	Describe the procedure for handing in visitors' firearms.	2	
		LO1.3	Describe and apply procedures for validating unidentified visitors roaming on the premises.	2	
		SO2	Maintain a clean and safe reception area according to organisational standards.		Provide a set of rules for the housekeeping standards for the reception area. Individual. Break your housekeeping standards standards down into a list of things to do and put a time limit to each activity. Individual. Explain in writing or verbally what the duties of a receptionist are and how these duties continue while housekeeping activities occur and roleplay all your procedures. Individual.
		LO2.1	List and explain housekeeping standards according to organisational requirements.	2	
		LO2.2	Implement housekeeping standards within agreed timeframes.	1	
		LO2.3	Demonstrate that reception services are not disrupted while housekeeping activities are performed.	1	
		SO3	Create a presentable reception area. Relate and co-ordinate corporate image displays to create a presentable reception area.		Visit three organisations to see whether their reception areas display the corporate image. Group.
		LO3.1		2	

		LO3.2	Keep the display area neat, tidy and clean at all times.	1	Draw up a set of guidelines for the new receptionist as to how to keep the display area neat and tidy. Individual.
		LO3.3	Constantly maintain and stock brochures of companies for distribution.	1	Visit a local travel agency if there is one in your area and observe how the brochures are displayed. Group.
7 to 10	**2: Answer Customer Enquiries in an Office Setting**	**SO1**	**Greet a customer and identify his or her needs or problems.**	**30**	
		LO1.1	Greet the customer courteously according to established procedures.	2	
		LO1.2	Request or obtain additional information to clarify the customer's need.	1	As a class, brainstorm the topic "What needs could a customer have from an organisation. Group.
		LO1.3	Identify the customer's need and, if necessary, reflect back to the customer to obtain clarity.	1	
		LO1.4	Describe and apply known procedures to resolve enquiries of semi-routine and predictable nature.	2	Draw up a flow chart showing what actions you would take. This flow chart will be used as a standard operating procedure by your fictitious company. Individual.
		S02	**Attend to a customer's telephone, facsimile and electronic request.**		
		LO2.1	Answer queries in a limited range of established contexts clearly, accurately, objectively and confidently.	3	
		LO2.2	Supply requested information or refuse requests politely and provide reasons for declining requests.	2	Write a case study of an example of information that was given out when it should not have been. Individual.
		LO2.3	Request and record details of customers by following established and familiar procedures (limited to computerised spreadsheets and/or logbooks).	2	Create a page from a log book or computerised spread sheet on which you may choose to record client details. Individual.
		LO2.4	Note the details of the enquiry and reflect back to the caller to check for accuracy.	1	You are the receptionist who is taking down details of the customer on the telephone. Reflect these details back to the caller so that accuracy can be checked. Individual.
		LO2.5	Conclude the call according to established and familiar procedures.	1	write at least three statements with which you could end a conversation. Individual.

11			**SO3**	**Refer a customer's request.**		
			LO3.1	Follow established procedures to explain delays or non-availability of assistance.	1	Write a case study of an example in an organisation where you are unable to fulfil a customer's request. Individual.
to			LO3.2	Identify and describe enquiries of unpredictable nature that should be referred to experienced staff.	2	Do research amongst your adult friends and family to find out examples where they have not been able to be helped by a receptionist who they were referred to. Individual.
18			LO3.3	Describe and appiy procedures for dealing with unusual or unfamiliar problems and queries.	2	As a group, discuss problems that you think could arise in an organisation Discuss how you could apply procedures for dealing with these problems. Write a paragraph taking one of the problems that you discussed in your group and show you how you would apply an established procedure to deal with it.
			LO3,4	Explain how to reach agreement with the customer on follow-up actions.	1	Role play a situation with a client in which you and the client agree on the best way to handle follow-up actions.
			SO4	**Respond to customers in a face-to-face situation and on the telephone.**		
			LO4.1	Identify and acknowledge customer complaints according to established procedure.	1	The class should hold a debate entitled "Complaints are beneficial to an organisation". Discuss whether you think the following are complaints:
			LO4.2	Describe and apply procedures to obtain accurate and relevant information needed to deal with queries.	2	The activity for this unit will be combined with that of a later unit.
			LO4.3	Communicate complaints and promises made to customers promptly to senior staff for information and verification.	2	The activity for this unit will be combined with that of a later unit.
			LO4.4	After consultation with senior staff members, give feedback to customers regarding the progress of complaints.	1	Activity for this unit will be combined with previous unit.
			LO4.5	Describe and apply procedures to classify calls.	2	If you were in charge of a company, what procedure would you use to classify calls? Individual.
			LO4.6	Record the client interaction as required by company policy.	1	Think of any other ways of recording the complaint? Individual.

	3: Receive, Consult and Direct Visitors in a Reception Area	SO1	Receive visitors in accordance with organisational requirements.	16	
		LO1.1	Acknowledge and greet visitors according to organisational requirements.	1	Class discussion and debate on reception and observe a receptionist in her reception area and rate her.
		LO1.2	Establish a rapport with visitors.	2	Group discussion on communication and empathy.
		LO1.3	Maintain professional appearance and behaviour at all times.	2	Draw up a set of guidelines regarding how to build rapport with a visitor. Individual.
		LO1.4	Verify visitors' requirements according to organisational requirements.	2	
		SO2	Process visitors' requirements according to organisational procedures. Learning Outcomes:		
		LO2.1	Consult visitors in a professional manner and establish the reason for their visit.	1	Give examples that a receptionist may ask her visitors. In pairs, discuss why it is important to listen in the workplace. Question a friend - introduce the person. Take turns to act as speaker and listener. Game.
		LO2.2	Attend promptly to a request for information.	1	
		LO2.3	Estimate the time or waiting period and convey it to the client.	1	Role play a situation in which a visitor approaches a receptionist.
		LO2.4	Document and dispatch documents or deliveries as per organisational requirements.	2	discuss how you would organise and record deliveries. Compile the format of the documentation
19 to 23		SO3	Direct visitors according to organisational requirements. Learning Outcomes:		
		LO3.1	Notify relevant parties of visitors' arrival.	1	observation of a reception area
		LO3.2	Give clear directions to visitors to relevant areas in the workplace.	1	Broken telephone game. Draw directions.
		LO3.3	Explain and apply security procedures for visitors.	2	Design visitor's book and establish security procedures. Individual.
	4: Employ Effective Telephone Etiquette	SO1			
			Employ effective telephone etiquette.	26	
		LO1.1	Explain and apply telephone etiquette and answering procedures.	3	Discussion and how to answer a phone, put a caller on hold and consider factors that hinder communication.

		LO1.2	Identify and explain factors that hinder communication.	2	
		LO1.3	Handle calls with discretion and confidentiality.	3	
		LO1.4	Put the caller on hold when not conversing directly with the caller.	1	
		LO1.5	Frequently consult with a caller on hold and establish whether he or she wishes to remain on hold.	1	
		SO2	**Answer telephone according to organisational standards. Learning Outcomes:**		
		LO2.1	Answer telephones promptly and according to standard operating procedures. . Greet caller according to organisational requirements.	2	How to answer a phone according to standard operating procedures and obtain information relevant to the enquiry. Individual.
		LO2.2	Acquire relevant caller information during initial interaction.	1	
24 to 27		**SO3**	**Process incoming calls according to organisational standards. Learning Outcomes:**		
		LO3.1	Redirect calls appropriately.	1	How to screen calls. Individual.
		LO3.2	Explain and apply the correct techniques to handle and hold multiple lines.	2	
		LO3.3	Screen calls as per standard operating procedures.	1	
		LO3.4	Take and transmit messages if required or requested according to organisational requirements. . If required, obtain further assistance from appropriate sources.	2	How to take messages. Group
		SO4	**Process outgoing calls in accordance with organisational requirements. Learning Outcomes:**		
		LO4.1	Obtain and prepare information and documentation required for the call.	1	How to process outgoing calls according to organisational requirements. Group.
		LO4.2	Dial the correct number when making outgoing calls.	1	
		LO4.3	Clearly state the purpose of calls according to organisational procedures.	1	

		LO4.4	Record resulting actions from calls.	2	
		LO4.5	If required or requested, leave messages according to organisational requirements.	2	
	5: Operate and Take Care of Equipment	SO1	**Operate four different items of office equipment according to manufacturer operating instructions.**	**31**	
		LO1.1	Explain and apply instructions for operating equipment responsibly and with due regard for safety.	4	Complex versus simple equipment. Individual.
		LO1.2	Apply known solutions to identify and solve predictable problems or faults that occur routinely.	2	Safety posters. Individual.
		LO1.3	Identify and report persistent and non-routine problems or faults that require technical skills to the relevant authority.	1	Maintenance/repair requisition. Individual.
		SO2	**Maintain equipment in a clean and working condition.**		
		LO2.1	Clean and maintain equipment and replace consumable items according to the manufacturer's	1	Maintenance and cleaning group discussions and lists
		LO2.2	Explain the dangers of working with electricity and apply the prescribed safety precautions when cleaning equipment.	3	Hazard preventative measures. Individual.
		LO2.3	Dispose of discarded items safely and appropriately.	1	Disposal of empty toner cartridges. Group.
		LO2.4	Leave equipment and immediate work areas in a clean and tidy condition.	1	Cleanliness notice. Group.
		LO2.5	Store and dispatch recyclable components safely and according to company policy.	1	Company policy on recyclable components. Individual.
28		SO3	**Monitor and request equipment consumables.**		
to		LO3.1	Calculate the average daily quantity of consumables needed per item of equipment.	1	Daily usage calculations. Individual.
30		LO3.2	Describe and apply procedures to monitor equipment consumable levels and report low levels.	2	Authority to purchase request. Individual.
		LO3.3	Request equipment consumables according to	1	Recording stock levels. Individual.

		LO3.4	established procedures. Describe and apply procedures for secure handling and storage of equipment consumables.	2	Consumable issues checklist. Individual.
		LO3.5	Use equipment consurnables in expiry date sequence, the oldest products first.	1	Office supplies life span. Individual.
		LO3.6	Keep up-to-date, legible and accurate equipment consumable records.	1	Consumable records. Individual.
		SO4	**Identify and minimise safety risks when operating equipment in an office environment. Learning Outcomes:**		
		LO4.1	Correct existing or potential safety risks involving equipment in own area of responsibility.	1	Inspection check list. Individual.
		LO4.2	Identify and describe safety risks involving equipment outside own responsibility and report risks promptly and accurately to the appropriate authority.	1	Memorandum on safety issues. Individual.
		LO4.3	Identify and describe actions to deal with emergencies involving equipment.	2	Essential emergency activities. Individual.
		LO4.4	Report and record emergencies involving equipment accurately in an agreed format.	2	Emergency incident report. Individual.
		LO4.5	Organise the area around equipment to minimise risk to self and others.	1	Physical office layout. Individual.
		LO4.6	Identify and apply procedures to minimise safety risks when operating equipment in an office environment.	2	Equipment office floor plan. Individual.
	6: Receive, Distribute and Dispatch Mail	SO1			
			Receive and sort mail.	19	
		LO1.1	Receive mail according to established procedures.	1	How to process outgoing calls according to organisational requirements. Group.
		LO1.2	Sort mail according to established procedures within an appropriate time.	1	Design a mail register. Individual.
		LO1.3	Describe the importance of maintaining confidentiality and security of documentation	2	Prepare a list of confidential mail and the reasons for security. Individual.

			in terms of receiving and sorting mail.		
		LO1.4	Strictly observe confidentiality in terms of a mail room code of conduct.	1	Identify reasons for confidential items. Individual.
31		**SO2**	**Distribute and dispatch mail.**		
		LO2.1	Distribute mail internally to relevant persons within an agreed time.	2	Messenger daily task list/roster. Individual.
to		LO2.2	Explain possible reasons for unavoidable or necessary delays in distribution and describe the possible consequences of delays.	2	Planning staffing requirements. Individual.
34		LO2.3	Describe and apply procedures for dispatching mail externally in accordance with established procedures and Post Office requirements.	1	List all the SA Post Office services. Individual.
		LO2.4	Attach enclosures securely and report missing items according to organisational procedures.	1	How to deal with missing items. Individual.
		LO2.5	Address mail legibly and correctly for internal and external distribution.	1	Example of addressed envelope. Individual.
		LO2.6	Dispatch mail externally by Post Office or courier service within agreed deadlines.	1	Drawing up daily roster of activities. Individual.
		SO3	**Describe the importance of mailroom processes and why it is necessary to create evidence.**		
		LO3.1	Explain the reasons for stamping incoming mail. Stamp mail correctly according to established	1	Design "Mail Received" stamp. Individual.
		LO3.2	Record procedures for executing different tasks and explain the reason for creating the record in terms of departmental requirements.	2	Documenting mailing procedures. Individual.
		LO3.3	Explain the legal implications of neglecting to comply with mail room procedures in terms of own work	2	Discuss the problems of neglecting the mailroom procedures.
		LO3.4	Explain why it is important to avoid unnecessary errors in terms of cost and own performance.	1	List the financial implications of mail delivery problems. Individual.
	7: Create Evidence & Maintain Confidentiality	**SO1**	**Identify and maintain the types of record required in own industry and understand why it is necessary to create evidence and maintain confidentiality.**	24	

		LO1.1	Explain the reason for recording information with reference to an actual document used in a selected business sector.	1	Why keep records? Group.
to 38		LO1.2	List five examples of the types of information contained in records in one's own business sector.	2	List five examples of types of information about you which are kept in the College records.Group.
		LO1.3	Name three methods of creating records that use different types of technology.	1	How do you keep your own records? Group.
		LO1.4	Describe three different roles in an organisation and explain the purposes for which records are kept.	2	Draw up a list of the information about you. Individual.
		SO2	**Name and describe the types of record that are specific to a contract in a selected business sector.**		
		LO2.1	Explain the type of information contained in a contract, agreement or quotation with reference to an actual document.	1	Employment contract survey. Group.
		LO2.2	Describe the purpose of maintaining a record of contracts, agreements and quotations with reference to specific case studies.	2	
		LO2.3	Explain the importance of recording specific client details with examples from a selected business sector.	1	
		LO2.4	Explain the purpose of recording changes to contracts, agreements and quotations with reference to three different circumstances.	1	Why do we have contracts? What purpose do they serve? Group.
		SO3	**Locate and provide records to users on request.**		
		LO3.1	Use suitable paper or electronic filing systems to locate the required record.	1	
		LO3.2	Locate, access and retrieve requested data within agreed organisational service levels.	1	Locate and provide identified recorded documentation. Individual.
		LO3.3	Explain reasons why confidential records are given only to authorised people and the implications of releasing information to unauthorised persons in terms of risk to the organisation.	2	Why this information is given to only authorised personnel. Individual.

	LO3.4	Make and provide a copy of a record, note compliance to original documents and return original documents to their correct location.	1	Copy the confidential document, note the content and re-file correctly. Individual.
	LO3.5	Explain and apply security and confidentiality procedures for records.	1	
	SO4	**Maintain confidentiality of customer and company information.**		
	LO4.1	Use established procedures to identify and report violations of company procedu'res relating to confidentiality of information	2	Recognise the violations of company procedures relating to the confidentiality of information. Group.
	LO4.2	Identify and disclose classified information to approved personnel.	1	Recognise information classified as confidential. Group.
	LO4.3	Explain organisational and legal requirements for storage systems and procedures.	2	Know and understand the legal requirements to the storage systems. Group.
	LO4.4	Identify situations where colleagues do not comply with security and confidentiality procedures and report immediately to the appropriate authority.	1	Identify situations where colleagues do not comply with the company and confidentiality procedures. Group.
	LO4.5	Carry out all work activities according to the code of conduct and within the security requirements of the organisation.	1	Work according to an established Code of conduct. Group.
8: File a Variety of Documents in Existing Systems	**SO1**			
		File a variety of documents in existing systems.	28	
	LO1.1	Oversee that paper-based documentation is classified, sorted and recorded according to established procedures.	1	Filing documents. Group.
	LO1.2	Store information in the correct location and sequence and explain the effect of misfiled documentation on an organisation.	2	List consequences of lost documentation. Individual.
	LO1.3	Store documents in a manner that ensures safety, security and accessibility.	1	Identify and name the types of files. Individual.
	LO1.4	Classify information and cross-reference accurately.	2	How to set up a new clients file. Individual.
	LO1.5	Refer classification uncertainties to an appropriate authority.	1	Writing a classification request memorandum. Individual.

		LO1.6	Explain methods of classification and cross-referencing and problems resulting from unconventional classification and cross-referencing	3	Using File Cross-referencing slips. Individual.
		LO1.7	Archive and locate documents according to organisational procedures.	1	The filing flow chart. Individual.
		LO1.8	Explain the implications for productivity when an item cannot be located.	1	Assessing the cost of losing or mislaying information or documents. Individual.
		LO1.9	Source and gather filing documentation.	1	Receiving and assessing information
		LO1.10	Electronically create and label documents according to organisational requirements.	3	Creating an electronic file label. Individual.
		LO1.11	File electronic documentation according to organisational requirements.	1	Matching documents and files. Individual.
		LO1.12	Complete filing within organisational timeframes and standards.	1	Filing documents. Group.
		LO1.13	Sort, classify and store all materials in a safe and secure manner.	1	Importance of classification and storage. Individual.
		SO2	**Retrieve information from an existing storage system. Learning Outcomes:**		
		LO2.1	Obtain, copy and dispatch information promptly to the correct person or location.	1	List steps to obtain a file or document not in its location. Individual.
		LO2.2	Communicate supply delays and politely explain reasons for delay.	1	List activities necessary to track a missing document. Individual.
		LO2.3	Record information retrieved correctly to track all files.	1	List all tracking documents. Individual.
		LO2.4	Identify missing or overdue items and follow correct procedures to locate them.	1	List the steps to identify overdue returns of documents. Individual.
		SO3	**Store valuable documentation and reference materials securely.**		
		LO3.1	Explain and maintain the process for securing valuable items.	1	Class discussion on valuable items. Group.
		LO3.2	Explain the reasons for security procedures and describe the effects of a breach of security on an organisation.	2	List reasons for file security breaches. Individual.
		LO3.3	Identify and correct security risks in own area of responsibility.	1	Give reasons for important security risks. Individual.

		LO3.4	Identify and report security violations according to organisational procedures.	1	Identify activities to trace missing documentation. Individual.
39	**Examinations/Rev ision**			5	
40	**Examinations/Rev ision**			5	
			TOTAL HOURS : TOPIC 1	13	7%
			TOTAL HOURS : TOPIC 2	30	16%
			TOTAL HOURS : TOPIC 3	16	9%
			TOTAL HOURS : TOPIC 4	26	14%
			TOTAL HOURS : TOPIC 5	31	17%
			TOTAL HOURS : TOPIC 6	19	10%
			TOTAL HOURS : TOPIC 7	24	13%
			TOTAL HOURS : TOPIC 8	28	15%
			TOTAL HOURS REGISTRSTION/INDUCTION/REVISION/EXAMS	20	
				207	100%

Office Data Processing level 2 assessment guidelines

1. topics that form part of the internal assessment for the PoE

No of units	Assessment	Coverage
11	Formal practical tests	1 or more completed topics
2	Practical exams	

2. specifications for the external assessment – level 2

Integrated Summative Assessment Task (ISAT)

A compulsory component of EASS is the **Integrated Summative Assessment Task (ISAT)**, which is a major assessment task that draws on the student's cumulative learning achieved throughout the full year. The task requires ***integrated application of competence*** and is executed and recorded in compliance with assessment conditions.

(Notes: Two possible approaches to the ISAT may be applied as follows:

The students could be assigned a task at the beginning of the year, which they will have to complete in various phases in the year to obtain part assessment. The final assessment is made at the end of the year upon completion of the task.
OR
The other option is that students will have achieved the competencies through the year but the competencies will be assessed cumulatively in a single assessment/exam session at the end of the year.

The ISAT will be set by the externally appointed examiner and be conveyed to colleges within the first quarter of each year. The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.
National examination

A formal theory examination is conducted in October/November each year by means of a papers set externally and marked and moderated externally.   The ff. distribution of cognitive application should be followed:

Level 2	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
	10%	80%	10%

The ff guidelines are offered for the setting of the Office Data Processing Level 2 exam:

Nature of paper   : External
Number of papers   : 2
Duration   : 2 hours each
Total mark allocation   : 200 marks
Number of sections   : 2 sections
Compulsory sections   : Section A and B
Total number of questions   : 6 Questions
Mark allocation per question   Section A: (30)
                                                            Speed test
                                                            Section B: (Advanced) (170)
                                                            Advanced Tables, Business letter on letterhead, Circular letter, Circular minutes, Advertisement, Form, Notice and Agendas, Tables, Columns

                                                            Paper 2: (200 marks) (2 hours)
                                                            5 Questions
                                                            Audio typing:
                                                            Intermediate Business letter, Circular minutes, Advertisements, Forms, Notice and Agendas, Tabulation

3. assessment guidelines

Topic 1:   <u>**Speed (30 wpm)**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Speed	Equip students with the necessary skills of touch-typing.	• **Equip students with a typing speed of 30 wpm.**	Practical Computer Classroom, SIM

Topic 2:   <u>**Alphabetical, numerical and special keys**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Keyboard proficiency	Alphabetical, numerical and special keys and the use of special and compound signs in an office environment.	• Demonstrate the use of the Alphabetical, Numerical and Special keys, with the keying in of paragraphs in an office environment. • The various special and compound signs are correctly keyed in and explained.	Practical Computer Classroom, SIM

Topic 3:   <u>**Manuscript signs**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Manuscript signs	Execute manuscript signs.	• Produce postable business documents by executing manuscript signs.	Practical Computer Classroom, SIM

Topic 4:   <u>**Business Letters with Envelopes**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Business letters on letterheads with envelopes	Type business letters on letterheads and prepare necessary envelopes	• The difference between the display of a business letter and a friendly letter are correctly pointed out and the salutation, content heading and conclusion to a business letter are correctly supplied and keyed in with the correct use of manuscript signs. • Business letter as well as the information required on a letterhead is correctly keyed in on a letterhead in a manner suitable for posting as well as the preparation for an envelope for the business letter is correctly prepared.	Practical Computer Classroom, SIM

Topic 5:   **Circular letters, letters with tear-off slips, tables and quotations**

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Circular letters/minutes on letterheads with official envelopes.	Type circular letters/minutes on letterheads and official envelops.	• Produce circular letters/minutes on letterheads and official envelopes within an office environment. • Circular letter and circular minute are correctly and accurately keyed-in from information supplied and the printed documents must	Practical Computer Classroom, SIM

		be suitable for posting.	

Topic 6:   Official Correspondence

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Official letters on letterheads	Type official letters on letterheads.	• Produce official letters on letterheads within a office environment. • The difference between a business letter and an official letter are correctly listed and the difference between an official circular and circular minute are correctly explained, and demonstrated in an office environment.	Practical Computer Classroom, SIM

Topic 7:   Job application documents

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Job Application Documents	Process job application documents for the simulated enterprise	• Process job application documents for the simulated enterprise such as job application letters, testimonials, curriculum vitae, letter of application and letters of appointment	Practical Computer Classroom, SIM

Topic 8:   Documents of Meetings

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Documents of meetings for the	Type documents of meetings	• Produce documents of	Practical

simulated enterprise.	for the simulated enterprise.	meetings for the simulated enterprise.	
			Computer Classroom, SIM

Topic 9:   <u>**A4 Portrait and Landscape Programmes and Tables**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Advertisements, menus programmes and tables.	Type advertisements, menus, programmes and tables.	• Display advertisements, menus programmes and tables effectively within the office environment.	Practical Computer Classroom, SIM

Topic 10:   <u>**Audiotyping**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Audio typing	Produce business documents by making use of Audio machines.	• Produce business documents by making use of Audio machines.	Practical Computer Classroom, SIM

Office Data Processing level 2 – 40 week plan

PROGRAMME: Certificate in Office Administration

SUBJECT & LEVEL: Office Data Processing Level 2

Key for Shaded Areas:

TOPICS	WEIGHTED VALUE
1. Touch-typing	10%
2. Paragraphs and Numbered Paragraphs	10%
3. Manuscript Signs	10%
4. Business Letters with Envelopes	20%
5. Circular Letters, Letters with Tear-Off Slips and Quotations.	10%
6. Official Correspondence	5%
7. Job Application Documents	10%
8. Meeting Documentation	10%
9. A4 Portrait and Landscape Programmes and Tables	5%
10. Audio Typing	10%
TOTAL	**100**

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
1	**Touch-typing (30wpm)** Demonstrate the skill of touch-typing	Demonstrate touch-typing effectively by typing different documents. Reach a typing speed of 30 words per minute (wpm) by the end of the year.		Practical Computer Classroom, SIM			
2				Practical Computer Classroom, SIM			
3	**Consolidation of Topic**	**Topic Summative Assessment**					
4	**Paragraphs and Numbered Paragraphs** Process documents in paragraph and numbered paragraph format	Demonstrate the use of the alphabetical, numerical and special keys by typing paragraphs in an office environment. Explain the various special and compound signs correctly.		Practical Computer Classroom, SIM			
5				Practical Computer			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
				Classroom, SIM			
6				Practical Computer Classroom, SIM			
7	**Consolidation of Topic**	**Topic Summative Assessment**					
8	**Manuscript Signs** Process documents effectively by executing manuscript signs correctly	Produce business documents that can be posted by executing manuscript signs		Practical Computer Classroom, SIM			
9				Practical Computer Classroom, SIM			
10	**Consolidation of Topic**	**Topic Summative Assessment**					
11	**Business Letters with Envelopes** Produce basic business letters on letterheads with envelopes	Explain the difference between a business letter and a friendly letter and point out the correct salutation, content heading and	Understanding the terms	Practical Computer Classroom, SIM			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/wor kplace
		conclusion for a business letter. Supply and type a business letter correct using manuscript signs. Include letterhead information and a business letter for posting Prepare an envelope for the business letter.					
12			Pre-Writing	Practical Computer Classroom, SIM			
13			Writing	Practical Computer Classroom, SIM			
14			Organising	Practical Computer Classroom, SIM Activity 1 - 4			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
15			Editing	Practical Computer Classroom, SIM Activity 5 – 9			
16			Rewriting	Practical Computer Classroom, SIM Activity 10 -14			
17			Publishing	Practical Computer Classroom, SIM Activity 15 – 19			
18	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 20 – 21			
19	**Circular Letters, Letters with Tear-off Slips and Quotations** Produce circular letters or minutes on letterheads with official	Produce circular letters or minutes on letterheads with official envelopes in an office environment Type circular letters	Circular Letters	Practical Computer Classroom, SIM			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/wor kplace
	envelopes	and minutes correctly and accurately from information supplied and prepare the printed documents for posting		Activity 1 – 4			
20			Letters with tear-off slips Quotations	Practical Computer Classroom, SIM Activity 5 – 10			
21	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 11 – 12			
22	**Consolidation Week**						
23	**National Examination**		Section A: Speed Test Section B: Advanced Tables, Business Letter on letterhead, Circular Letter, Circular Minutes, Advertisement, Form, Notice and Agendas, Tables, Columns				
24	**Official Correspondence**	Produce official letters on letterheads in an office environment	Understanding the terms	Practical Computer			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
	Produce official letters on letterheads	List and explain the difference between a business letter and an official letter List, explain and demonstrate the difference between an official circular and circular minutes in an office environment	Formatting official correspondence Enclosures Carbon copies Printed copies	Classroom, SIM Activities 1 -3			
25	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 4 - 5			
26	**Job Application Documents** Produce job application documents	Process job application documents for the simulated enterprise. *Range: Job application letters, testimonials, curriculum vitae, letters of application and letters of appointment*	Communicating for employment The direction of job application letters Understanding an enquiry versus an application The covering letter Addressing and writing the letter	Practical Computer Classroom, SIM			
27			The Curriculum Vitae (CV)	Practical Computer Classroom,			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
			Testimonials	SIM Activity 1			
28			Letters of appointment Other documents associated with the job application process	Practical Computer Classroom, SIM Activity 2			
29	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 3 - 4			
30	**Meeting Documentation** Produce meeting documentation	Produce meeting documentation, e.g. agendas and minutes of meetings, for the simulated enterprise	Meetings	Practical Computer Classroom, SIM Activity 1			
31			Agenda of a meeting	Practical Computer Classroom, SIM Activity 2 – 3			
32			Minutes of a meeting	Practical Computer			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
				Classroom, SIM Activity 4 – 6			
33	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 7 - 8			
34	**A4 Portrait Landscape Programmes and Tables** Produce advertisements, menus, programmes and tables	Type and display advertisements, menus, programmes and tables effectively in the office environment	Page Orientation Tables Designing Advertisements Designing Menus Designing Programmes	Practical Computer Classroom, SIM Activity 1 – 3			
35	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 4 - 5			
36	**Audio Typing** Produce business documents using audio machines	Produce business documents, such as intermediate business letters, circular minutes, advertisements, notices, agendas and tables using audio machines	The analogue equipment The digital equipment	Practical Computer Classroom, SIM Activity 1 – 3			
37			The biological equipment	Practical			

Week	Unit	Assessment standards	Sections	Assessment Tasks/Activities	Time Allocated (in hrs)	Completion date	Hours in workshop/workplace
				Computer Classroom, SIM Activity 4 – 7			
38	**Consolidation of Topic**	**Topic Summative Assessment**		Activity 8 – 9			
39	**Consolidation Week**						
40	**National Examination**		Section A: Audio Typing, Intermediate Business Letter, Circular Minutes, Advertisements, Forms, Notice and Agendas, Tabulation				

Business Practice level 2 assessment guidelines

1. topics that form part of the internal assessment for the PoE

No of units	Assessment	Coverage
7	Formal written tests	1 or more completed topics
2	Internal written exam	All completed topics
7	Practical assessments	Must cover the related subject outcomes Projects

2. specifications for the external assessment - level 2

Integrated Summative Assessment Task (ISAT)

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National examination

A formal theory examination is conducted in October/November each year by means of a papers set externally and marked and moderated externally. The ff. distribution of cognitive application should be followed:

Level 2	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
	40%	40%	20%

The ff guidelines are offered for the setting of the Business Practice Level 2 exam:

Nature of paper   : External
Number of papers   : 1
Duration   : 2 hours
Total mark allocation   : 150 marks
Number of sections   : 3 sections
Compulsory sections   : Section A, and B
Total number of questions   5
Mark allocation per question

Section A: Compulsory (must cover all Topics)
2 questions of 25 marks each, covering short questions, eg. True/false, leave out words, monkey puzzle, etc.
Total mark: 50 marks

Section B: 100 marks
Question 1:   Professional behaviour in a Business Environment   40 marks
Question 2:   Health, Safety and Security in the workplace   20 marks
Question 3:   Structure of an organisation as a workplace   20 marks
Question 4:   Structure of an organisation as a workplace   20 marks

Total marks: 100 marks

3. assessment guidelines

Topic 1:   <u>Professional behaviour in a Business Environment</u>

Subject outcomes	Assessment Standard	Learning outcomes	Assessment Tasks/Activities
Behave in a professional manner in a Business environment	Know how to behave in a business environment	- Dress code is described in accordance with established and familiar policy. - Reasons why it is important to honor one's own working hours are explained with examples of the effects when this is not done. - The importance of a positive attitude is explained and qualities that indicate attitude are identified in a familiar context. - Good work practice is described in terms of keeping colleagues informed about work activities such as work in progress, absence from work or workstation and leave. - The reasons why listening skills are important in the workplace are named and examples are given of the results of negative and positive listening skills. - Regulations regarding smoking in the workplace are described with reference to both legal requirements and	Role-Play, Practical exercises, Tasks SIM

		established policy.	
		• The criteria included in a Company Code of Good Conduct are understood and applied in a familiar situation.	
	Interpret body language in a business environment	• Reasons why it is important to interpret body language correctly in the workplace are given with examples from a selected business context.	
		• The reasons why good posture and eye contact are important in the workplace are explained with examples from a selected business context.	
		• The proper use of a handshake as a greeting in a business setting is explained and the meaning of different handshakes used in South Africa are compared with examples of when it is appropriate to use each handshake.	
		• The reasons why it is important to respect other people's space and why it is in appropriate to touch other people in a business environment are explained with examples of the consequences if one ignores business etiquette.	
		• Examples of positive and negative body language	

		are described in a familiar context. • Behaviour that could be considered as sexual harassment in the workplace is described with examples.	
	Meet people in a business setting	• Give an explanation as to why first impressions are important in a business environment. • Explain the procedure for dealing with unexpected guests is in terms of established procedures. • Greet guests in the reception area according to established and familiar procedures. • Welcome guests visiting a manager/superior according to established and familiar procedures. • Introduce people to each other in a business like manner. • Demonstrate different ways of closing an interaction with a customer in a familiar context.	
	Demonstrate an understanding of basic business ethics in the business environment.	• Discuss the concept of ethics in relation to one's own business environment. • Outline the meaning of ethical business practices with examples from a	

		• familiar context.	
		• Explore sources of ethical values with examples from a selected business environment.	
		• Explain the concept of ethical values on -the-job with relevant examples.	
		• Describe personal attitudes and factors that affect ethical values in the workplace with examples from a familiar business context.	
		• Explore the concept of ethical diversity at a basic level of understanding using realistic examples from a business context.	

Topic 2:   Health, Safety and Security in the workplace

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Contribute to the health, safety and Security of the workplace	**Identify potential hazards in the workplace.**	• Potential hazards are correctly identified and removed, reduced or reported in terms of own level of authority/capacity. • Instructions relating to exposure to dangerous substances and hazards in the workplace are known and an explanation is given as to why they pose a potential threat to the work environment.	Assignments, Case Studies SIM

		• The kinds of work that require protective clothing are identified and protective clothing is used according to legal requirements • Health and safety instructions are followed in situations that require lifting and handling of materials. • The importance of each employee being vigilant and reporting hazards and violations of health, safety and security procedures is known and understood with reference to a possible chain of events that could result from not reporting a violation.	
	Know how to limit damage to persons or property in the event of an accident or emergency	• The location of fire extinguishers, hoses and alarms is known in a selected work context. • The difference between the different kinds of fire extinguishers in the building is identified and the use for each is identified correctly. • The use of a fire extinguisher is demonstrated competently. • Established procedures relating to the identification of fires and other emergencies are known and followed promptly and correctly in an emergency.	

		- Dangerous occurrences are identified and accurately and timeously reported according to established policy. - Injuries involving individuals are reported promptly to the relevant authority. - Reasons are given to explain why it is the responsibility of every employee to maintain the safety and security of a selected work environment.	
	Know how to contribute to the maintenance of security in the workplace	- Security procedures are known and followed competently. - Security risks are identified and actions taken to deal with security risks that are within limits of own authority. - Potential security risks outside own authority are identified and reported using familiar and established procedures. - Suspicious behaviour is noted and action is taken within own level of authority and using familiar and established procedures. - Contribute to the health, safety and security of the insurance workplace	
	Explain emergency procedures in the workplace	- The established policy is known and understood for emergencies in the building. - The location of the planned	

		assembly points and the shortest routes to such points are known and the building is evacuated along the correct route. • The emergency signage in the building is interpreted correctly. • Emergency procedures are explained in a familiar context. • Actions to assist an injured or sick person in an emergency are demonstrated in a limited range of familiar contexts. • Precautions for dealing with HIV/AIDS in a workplace emergency are known and described in terms of the Universal Precautions	

Topic 3:   Structure of an organisation as a workplace

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Investigate the structure of an organisation as a workplace.	Identify the core business activities of a selected organisation	• The concept of core business is explained with an example from the relevant industry. • Specific core business activities are named with reference to the selected organisation. • The relationships between the different activities are described for the selected organisation.	Assignments, Projects, Case Studies Classroom

		• A system or process within a selected work unit is described in the correct sequence. • Examples are listed of ways in which the core business adds value to the organisation	
	Identify support functions within a selected organisation	• The concept of support functions is explained with an example from the relevant industry. • Specific support functions are named with reference to the selected organisation. • The relationship between one support unit and the other business units of the selected organisation is explained at a basic level of understanding. • Five examples are listed in which the support unit adds value to the organisation.	
	Explain the role of a selected department in an organisation and its contribution (to the effectiveness the organisation).	• The main function of the selected department or section is explained in relation to Core business or support. • The roles of at least two other departments or sections that interact with the selected section or department are explained at a basic level of understanding. • The most senior person in the	

		department is identified with, where applicable, the title of his/her position.	
		• The line is identified from the senior person in the department or section to the Board of Directors.	
		• The effect on the organisation if the department or section did not function effectively is described with examples.	
		• The value that the department adds to the organisation is identified with examples.	
		• Investigate the structure of an organisation as a workplace.	
	Investigate the different types of work done in the department	• The different roles in the department are identified and an outline is written of the kind of work done by three people.	
		• The work done in the department is categorised according to its purpose.	
		• The importance of each category of work is discussed with reference to the efficiency of the department.	
		• The work in the department is identified as a part of a set of related systems each with a role and a value.	

Topic 4*:* <u>**Organise oneself in a workplace**</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Organise Oneself In A Workplace	Maintain personal hygiene, grooming and dress code (to project a professional image and enhance the company image).	• Personal cleanliness, body odor, fresh breath, well-manicured hands, trimmed moustache/beard, appropriate hairstyle and tasteful make-up, immaculate uniform/dress.	Assignments, Research, Case Studies Classroom,SIM
	Decide whether to interact with people and follow company procedure when absent due to illness.	• Given a range of illness, decide whether to interact with people and follow company procedure when absent due to illness. Contagious diseases/virus infections (flu, chicken pox, measles, etc.) • Report absence, doctor's certificate, leave forms.	
	Identify possible unforeseen circumstances to plan alternative via action in advance.	• Lack of resources, change in company policy, interruption beyond control.	
	Evaluate own skills and areas for development (on current and likely future work requirements to identify needs for skills development).	• Evaluate own skills and areas for development (on current and likely future work requirements to identify needs for skills development).	
	Set measurable, achievable objectives for own skills development, (consistent with needs identified and in line with organisation's objectives and policies).	• Set measurable, achievable objectives for own skills development, (consistent with needs identified and in line with organisation's objectives and policies).	
	Prioritise objectives and plan	• Prioritise objectives and	

	activities to achieve objectives.	plan activities to achieve objectives.	

Topic 5:   <u>Manage time and work processes</u>

Subject outcomes	Assessment standards	Learning outcomes	Assessment Tasks/Activities
Manage time and work processes within a business environment	Create, use and maintain a task list	- The value of using and maintaining a task list is known and understood in terms of a specific work context. - Steps or stages are identified in a familiar set of tasks. - Information and documentation required are recorded on the task list and flagged for further action. - Additional information received is captured on line or processed manually. - Completed tasks are reported to the appropriate authority and checked off the task list. - An action plan is drafted to ensure that outstanding requirements are completed timeously	Assignments, Projects, Case Studies SIM, Classroom
	Use and maintain a diary	- The purpose of keeping a personal diary and an organisational diary system are known in the context of a self-mannagement tool - Relevant information is recorded in the	

		diary/system and updated regularly. • Diary entries are used to create an action plan.	
	Prioritise tasks	• Tasks are identified in order to create a task list. • Tasks are sorted and prioritised according to type and required deadlines. • Time needed to complete tasks is scheduled to allow for specified deadlines.	
	Plan and follow a work schedule	• Regular daily, weekly and monthly activities are named, and recorded on a work schedule. • A roster is drawn up to ensure that all the activities can be completed timeously. • Internal clients are informed of the aspects of the work schedule that affect them. • The schedule is followed and adjusted when necessary to allow for unexpected interruptions	

Business Practice level 2 – 40 week plan

Week	TOPIC BUSINESS PRACTICE LEVEL 2	SO/ LO Ref	SUBJECT & LEARNING OUTCOMES	Hrs	ASSESSMENT TASKS (PoE)
1	**Registration/induction**			5	
2	**Registration/induction**			5	
3	**1. Professional Behaviour in a Business Environment**	**SO1**	**Know how to behave in a business environment**	**20**	
to		LO1.1	General appearance	4	Class Discussion. Group. What you wear. Individual. How time-conscious are you? Individual. What happens when employees do not honour their working hours?
14		LO1.2	Working Hours	3	
		LO1.3	Attitude	5	My Social Image. Individual. Social Image and a positive attitude. Group. Role-play: Practising Assertiveness. Group.
		LO1.4	Keeping colleagues informed.	2	Procedures in case of absence. Group.
		LO1.5	Listening skills.	2	How well do you listen? Individual. Positive and negative listening. Group.
		LO1.6	Smoking Regulations.	2	Smoking Regulations Poster. Group.
		LO1.7	Company code of conduct.	2	Examining the college's code. Group.
		SO2	**Interpreting body language in the business environment**	**16**	
		LO2.1	Motivate why it is important to interpret body language correctly in the workplace and provide examples from a selected business context.	3	Class discussion. Group.
		LO2.2	Motivate why good posture and eye contact are important in the workplace and provide examples from	2	Questionnaire. Individual. Role-play in pairs. Checklist. Individual.

				a selected business context.		
	LO2.3	Explain the proper use of a handshake as a greeting in a business setting and compare the meaning of different handshakes used in South Africa with examples of when it is appropriate to use each handshake.	2	Meaning of handshakes. Group.
	LO2.4	Motivate why it is important to respect other people's space and why it is inappropriate to touch other people in a business environment, with examples of the consequences if one ignores business etiquette.	2	
	LO2.5	Describe positive and negative body language in a familiar context.	3	
	LO2.6	Describe, with examples, behaviour that could be considered as sexual harassment in the workplace.	4	Sexual harassment. Role-play. Group.
	SO3	**Meeting people in the business environment**	**11**	
	LO3.1	Explain why first impressions are important in a business environment.	3	Visit a reception desk. Group.
	LO3.2	Explain and apply established procedures for dealing with unexpected guests.	2	
	LO3.3	Greet guests in the reception area according to established and familiar procedures.	1	Welcome a business visitor. Role-play. Group.
	LO3.4	Welcome guests visiting a manager or superior according to established and familiar procedures.	2	
	LO3.5	Introduce people to each other in a business-like manner.	1	
	LO3.6	Demonstrate different ways of closing an interaction with a customer in a familiar context.	2	Closing interactions. Role-play. Group.

		SO4	**Demonstrate an understanding of basic business ethics in the business environment**	**15**	
		LO4.1	What is ethics?	3	Personal questionnaire. Individual.
		LO4.2	Ethics and values.	3	Sources of my values. Individual. Sources of a company's values. Group.
		LO4.3			Do a case study. Group. Business ethics in the work environment. Group. Ethical values on the job. Individual. An ethical values on-the-job concept map. Individual.
			Business ethics.	3	
		LO4.4	Personal attitudes and factors.	3	Debating business ethics. Group.
		LO4.5			Ethical values in the totally aligned organisation. Individual. Business ethics in the business environment. Individual.
			The totally aligned organisation	3	
	2. Health, Safety and Security In the workplace	**SO1**	**Hazards in the workplace**	**9**	
		LO1.1			Hazard in the workplace? Idividual. Sight visit to identify hazards. Pairs. Control the hazard. Group. Not reporting a hazard. Individual. Hazard Report. Pairs.
			Potential hazards in the workplace.	2	
		LO1.2	Dangerous substances.	2	Presentation. Group. Threat to the workplace? Group.
		LO1.3	Protective clothing.	2	Who wears what? Group.
		LO1.4	Lifting and handling materials.	1	Safe manual handling. Group.
		LO1.5	The importance of reporting hazards.	2	What if? Group. Emergency numbers. Pairs.
15		**SO2**	**Safety in the workplace.**	**3**	
To		LO2.1	Location of fire extinguishers, hoses and alarms in the workplace.	1	Find the fire fighting equipment. Group.
21		LO2.2	Fire extinguishers.	2	Match the columns. Individual.
		SO3	**Security in the workplace**	**6**	
		LO3.1	Security procedures	3	Security procedures. Group. Practice procedures. Group.
		LO3.2	Security risks.	3	Security audit. Group. Security risks. Individual. Security audit of your school. Group. Security procedure. Group. Personal Safety. Individual. Safety

						in public. Pairs.
		SO4	**Emergency procedures**		**14**	
		LO4.1	Established policy for emergencies in the workplace.		2	Emergency! Group. Emergency policy. Group.
		LO4.2	Location of planned assembly points.		1	Where to go in an emergency. Group.
		LO4.3	Interpret the emergency signage in the building correctly		2	Emergency signs. Group.
		LO4.4	What to do in an emergency		3	Emergency procedure. Groups.
		LO4.5	Assist an injured or sick person in an emergency.		3	First aid in an emergency. Groups.
		LO4.6	Precautions for dealing with HIV/ AIDS in the workplace emergency.		3	Assisting an HIV/AIDS patient in an emergency. Pairs.
	3. Structure of an Organisation as a Workplace	**SO1**	**Identify the Core Business Activities of a Selected Organisation**		**7**	
		LO1.1	Support Functions.		2	A business visit. Groups. Support Functions. Individual.
		LO1.2	Systems and Processes		3	Systems. Group.
		LO1.3	Core business and value		2	The value of core business. Group.
		SO2	**Identify Support Functions within a Selected Organisation**		**6**	
		LO2.1	Support Functions.		2	Support Functions
		LO2.2	Interconnecting functions.		3	Support Functions at your college. Group.
		LO2.3	The value of having an efficient support function.		1	Support Functions adding value at your college. Individual.
		SO3	**Explain the Role of a Selected Department in an Organisation and its Contribution to the Effectiveness of the Organisation**		**5**	
22 To		LO3.1	The Human Resource Department (HR)		2	HR supporting the core business. Group.

25		LO3.2	Positioning the HR Department.	1	The department's position in the company. Individual.
		LO3.3	Co-operating with other Departments.	2	HR and other Departments. Individual.
		SO4	**Investigate the different types of work done in the department**	**6**	
		LO4.1	Roles and Responsibilities.	4	HR Roles and Responsibilities. Group.
		LO4.2	Work categories.	2	HR categories. Individual. Systems. Group.
	4 Organise oneself in the workplace	**SO1**	**Hygiene and Grooming.**	**7**	
		LO1.1	Personal hygiene.	2	Wash your hands correctly. Pairs.
		LO1.2	Grooming.	3	
		LO1.3	Dress code	2	Identify the problems with this cartoon. Individual.
		SO2	**Illness in the workplace**	**5**	
		LO2.1	Illness at work.	1	When to stay home. Individual.
		LO2.2	Procedure when you are ill.	2	What is the procedure at your college? Pairs.
		LO2.3	Range of illnesses.	2	Interview your college nurse. Group.
26 To 33		**SO3**	**Unforeseen circumstances.**	**9**	
		LO3.1	Unforeseen circumstances.	2	
		LO3.2	Lack of resources.	2	
		LO3.3	Change in company policy.	2	Policy change. Group.
		LO3.4	Interruptions beyond control.	3	Industry visit. Group.
		SO4	**Skills and areas for development.**	**2**	
		LO4.1	Strengths and weaknesses.	2	Self analysis. Individual.
		SO5	**Objectives for skill development.**	**2**	
		LO5.1	Set measurable goals.	2	Plot your goals. Individual.
		SO6	**Prioritise and plan objectives.**	**10**	
		LO6.1	Prioritise objectives.	3	
		LO6.2	Plan activities to achieve objectives.	3	
		LO6.3	SWOT analysis.	4	SWOT analysis. Individual. Development Plan. Individual.

		SO7	**Review progress made for planned activities.**	**7**	
		LO7.1	Review progress	2	
		LO7.2	Monitor the plan.	2	Monitor plan.
		LO7.3	Reschedule activities.	3	Possible rescheduling.
	5 Manage time and work processes.	**SO1**	**Create, use and maintain a task list.**	**6**	
		LO1.1	Why use a task list at work?	1	
		LO1.2	Steps in a task.	2	
		LO1.3	Report and check completed tasks.	2	
		LO1.4	Draft an action plan.	1	Group task.
34		**SO2**	**Use and maintain a diary**	**4**	
To		LO2.1	Purpose of a diary.	1	Why use a diary? Pairs.
38		LO2.2	Record information in a diary.	2	Record activities into your diary. Individual.
		LO2.3	Update diary regularly.	1	Update your diary. Individual. Create an action Plan. Group.
		SO3	**Prioritise Tasks.**	**5**	
		LO3.1	Identify tasks.	1	
		LO3.2	Prioritise tasks.	2	
		LO3.3	Schedule time for tasks.	2	Task list. Pairs.
		SO4	**Plan and follow a work schedule.**	**11**	
		LO4.1	Work Activities.	2	Task list. Pairs.
		LO4.2	Work schedules.	2	
		LO4.3	Work roster.	2	Investigate work schedules and rosters. Group.
		LO4.4	Communicate work schedule.	2	Communication methods. Pairs.
		LO4.5	Follow and make adjustments to schedule.	3	Identify and record activities. Pairs.
39	**Examinations/Revision**			5	
40	**Examinations/Revision**			5	

TOTAL HOURS : TOPIC 1	62	34%
TOTAL HOURS : TOPIC 2	32	18%
TOTAL HOURS : TOPIC 3	18	10%
TOTAL HOURS : TOPIC 4	42	23%
TOTAL HOURS : TOPIC 5	26	14%

REGISTRSTION/INDUCTION/REVISION/EXAMS	20	100%
TOTAL HOURS	200	