

# **OBE for FET Colleges office administration**

Office Practice

Office Data Processing

Business Practice

**level 3**

**lecturer's guide**

NVA panel



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Lecturer's Guide

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## 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.

|   |   |
|---|---|
|  | <b>Cross-reference</b> This icon shows forward or backward links or references to other sections in the book.   |
|  | <b>Outcomes</b> 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. |
|  | <b>Individual</b> This icon indicates that students should work on their own.   |
|  | <b>Pair work</b> This icon indicates that the students should work in pairs.  |
|  | <b>Group work</b> 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.  |
|  | <b>ICASS</b> This icon shows an activity that could be used as part of the continuous assessment (ICASS) process, which should take place throughout the year.  |

|   |   |
|---|---|
|  | <p><b>Word bank</b> 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.</p>               |
|  | <p><b>Did you know?</b> Reference to web site and other sources of information to extend the students knowledge base.</p>   |
|  | <p><b>Questions</b> 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.</p> |
|  | <p><b>Minds</b> This icon indicates knowledge outcomes that students should have acquired.</p>  |
|  | <p><b>Hands</b> This icon shows skills-based outcomes or activities developed for students to apply knowledge (and values) that they have acquired.</p>   |
|  | <p><b>Hearts</b> This icon shows values-based outcomes that assist the students to express or develop particular values (or attitudes) to the issues raised.</p>  |

## 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<br>Assessment Guidelines   |
| Scheme of work  | A Learning Programme consists of 2 stages of planning<br>1. Work Schedule per level per subject<br>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.<br>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 NOF 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 NOF 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<br>(Who carries out the assessment?)  |   |
|--|---|
| Self-assessment<br>Peer assessment   | Group assessment<br>Lecturer assessment   |
| Assessment forms   |   |
| Presentation<br>Debate or argument<br>Interview<br>Demonstration<br>Questionnaire<br>Role-play<br>Test | Examination<br>Project<br>Simulation<br>Research or investigation<br>Assignment<br>Case study<br>Practical task |
| Tools for assessing student performance  |   |
| Rubric<br>Rating scale<br>Checklist  | Observation sheet<br>Marking memorandum<br>Assessment grid, etc.  |
| Recording tools  |   |
| Class list<br>Mark sheet   | Day-by-day assessment sheet<br>Promotion schedule, etc.   |
| Reporting tools  |   |
| Report card using national codes and comments on competence<br>Lecturer-parent interview               | Lecturer-student interview<br>Written comments in student's workbook<br>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   |
|                           |                        |                             | <b>Seven items</b> |

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:

| <b>Knowledge and understanding</b> |  |
|------------------------------------|--|
| 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?')   |
| <b>Application</b>   |  |
| 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.') |
| <b>Analysis</b>      |  |
| 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.')   |
| <b>Evaluation</b>    |  |
| 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:

| <b>Format</b>                                   |  |            |
|---|--|------------|
| Section 1 (compulsory)<br><b>Sub-total: 50</b>  | This section will include different types of objective questions, i.e.<br>Q1: multiple choice<br>Q2: short theoretical questions<br>Q3: calculations | Total: 50  |
| Section 2 (compulsory)<br><b>Sub-total: 150</b> | 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<br>(80–100%) | Highly<br>competent<br>(70–79%) | Competent<br>(50–69%) | Not yet<br>competent<br>(40–49%) | Not<br>achieved<br>(0–39%) |
|---|--------------------------|---------------------------------|-----------------------|----------------------------------|----------------------------|
| <b>CONTENT</b><br>Range<br>Coverage<br>Relevance        |                          |                                 |                       |                                  |                            |
| <b>CONTEXT</b><br>Command word<br>requirements          |                          |                                 |                       |                                  |                            |
| <b>SKILLS and<br/>VALUES</b><br>Skills<br>Values        |                          |                                 |                       |                                  |                            |
| <b>MECHANICS</b><br>Subject terms<br>Language<br>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<br>(time scale to be determined)                                      | less<br>than | 1 | 2 | 3  | 4 | 5 | or<br>more |
| Number of family members spoken<br>to   |              |   |   |    |   |   |            |
| Do you feel you learned anything<br>about yourself when doing this<br>project?                        | yes          |   |   | no |   |   |            |
| Comments:   |              |   |   |    |   |   |            |
| Do you feel the project helped you<br>understand yourself?  | yes          |   |   | no |   |   |            |
| Comments:   |              |   |   |    |   |   |            |
| Did you think you expressed this<br>information about yourself in an<br>interesting and exciting way? | yes          |   |   | no |   |   |            |
| Comments:   |              |   |   |    |   |   |            |
| Do you think you put a lot of effort<br>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 Everyone Achieves More**

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.

|                          |                      |                          |                            |
|--------------------------|----------------------|--------------------------|----------------------------|
| <input type="checkbox"/> | <b>Voice monitor</b> | <input type="checkbox"/> | <b>Time-keeper</b>         |
| <input type="checkbox"/> | <b>Motivator</b>     | <input type="checkbox"/> | <b>Record-keeper</b>       |
| <input type="checkbox"/> | <b>Assessor</b>      | <input type="checkbox"/> | <b>Chairperson/manager</b> |
| <input type="checkbox"/> | <b>Peace-maker</b>   | <input type="checkbox"/> | <b>Reporter</b>            |

### Rubric 3: Assessment of group skills

|  |            |           |                |
|--|------------|-----------|----------------|
| Group name/Number:.....                                    |            |           |                |
| Names:.....<br>.....                                       |            |           |                |
|  | <b>YES</b> | <b>NO</b> | <b>Comment</b> |
| <b>Did our group members:</b>                              |            |           |                |
| 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?<br>.....<br>.....<br>.....                 |            |           |                |
| What could we have done better?<br>.....<br>.....<br>..... |            |           |                |
| Signed:.....<br>.....<br>.....                             |            |           |                |
| Date .....   |            |           |                |

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

| TASK SKILLS                        | Student 1<br>* | Student 2<br>* | Student 3<br>* | Student 4<br>* | Student 5<br>* |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|
| Gives ideas                        |                |                |                |                |                |
| Asks questions                     |                |                |                |                |                |
| Stays on task                      |                |                |                |                |                |
| Follows directions                 |                |                |                |                |                |
| Checks the understanding of others |                |                |                |                |                |
| Gets group back on track           |                |                |                |                |                |
| <b>SOCIAL SKILLS</b>               |                |                |                |                |                |
| 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)**

|                     |  |   |   |   |   |   |   |     |
|---------------------|--|---|---|---|---|---|---|-----|
| <b>Process</b>      | 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): |   |   |   |   |   |     |
| <b>Product</b>      | 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 |
| <b>Presentation</b> | 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                           |              |            |           |          |
| <b>Converted to</b>                                  |              |            |           |          |

### 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<br>Not achieved   | 2<br>Not yet<br>competent  | 3<br>Competent   | 4<br>Highly competent   | 5<br>Outstanding  |
|-----------------------------|---|--|--|---|---|
| Knowledge and understanding | Demonstrates no understanding of the concepts, principles and theories required<br><br>Demonstrates no command of relevant factual knowledge<br><br>Shows no understanding of composition and structure | Demonstrates very little understanding of simple concepts, principles and theories<br><br>Demonstrates very little command of relevant factual knowledge<br><br>Shows very little understanding of composition and structure | Demonstrates a general understanding of ordinary concepts, principles and theories<br><br>Demonstrates general command relevant of factual knowledge<br><br>Shows general understanding of composition and structure | Demonstrates a significant understanding of major concepts, principles and theories<br><br>Demonstrates a significant command of relevant factual knowledge<br><br>Shows a significant understanding of composition and structure | Demonstrates comprehensive understanding of major concepts, principles and theories<br><br>Demonstrates comprehensive command of relevant factual knowledge<br><br>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<br><br>Cannot make interpretations based on data and other conclusions  | Shows some ability to construct tables and present data graphically<br><br>Makes inadequate and limited interpretations based on data and other conclusions  | Shows complete ability to construct tables and present data graphically<br><br>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   |  |   |   |
| Communication               | No ability to apply linguistic principles<br><br>Lacks business studies vocabulary.   | Makes errors in grammar and paraphrasing.<br><br>Uses business studies terms but lacks the ability to communicate clearly  | Uses grammar and paraphrasing correctly<br><br>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-<br>ing | Highly<br>competent | Competent | Not yet<br>competent | Not<br>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<br>Outstanding | 4<br>Highly competent | 3<br>Competent | 2<br>Not yet competent | 1<br>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  |  |   |   |   |   |   |   |
|--|--|--|--|---|---|---|--|---|--|---|---|---|---|---|---|
|  |  | Factor by                              | 5  | 4   | 3   | 2   | 1  | 1   | 2  | 3 | 4 | 5 | 6 | 7 | 8 |
|  |  | <b>CONTENT</b>                         | <b>Development:</b><br>Structure;<br>Organisation;<br>Support material | x 5<br>= /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 |   |   |   |   |   |   |
| <b>Effectiveness:</b><br>Purpose; Interest;<br>Reception | x 3<br>= /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    |   |  |   |   |   |   |   |   |
| <b>Value:</b><br>Ideas; Logic;<br>Originality            | x 3<br>= /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.                               |   |  |   |   |   |   |   |   |
| <b>Content sub-total</b>                                 | <b>50</b>  |  |  |   |   |   |  |   |  |   |   |   |   |   |   |
| <b>DELIVERY</b>  | <b>Physical:</b><br>Appearance;<br>Body language | x 5<br>= /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                           |   |  |   |   |   |   |   |   |
|  | <b>Voice:</b><br>Flexibility; Volume             | x 5<br>= /10                           |  |   | Has presence and uses the correct body language                                 | Demonstrates little presence body language needs attention                        | Has no presence; uses incorrect body language                              |   |  |   |   |   |   |   |   |

|                      |   |              |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |  |
|----------------------|---|--------------|--|--|--|---|--|--|--|--|--|--|--|--|--|--|--|--|
|                      | <b>Manner:</b><br>Directness;<br>Assurance;<br>Enthusiasm         | x 5<br>= /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 |  |  |  |  |  |  |  |  |  |  |  |
|                      | <b>Delivery sub-total</b>   | <b>30</b>    |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>COMMUNICATION</b> | <b>Appropriateness:</b><br>To purpose and audience                | x 5<br>= /10 |  |  | Audience and purpose taken into account                        | Very little awareness of audience and purpose               | No awareness of the audience or purpose shown    |  |  |  |  |  |  |  |  |  |  |  |
|                      | <b>Correctness:</b><br>Grammar;<br>Punctuation;<br>Word selection | x 5<br>= /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      |  |  |  |  |  |  |  |  |  |  |  |
|                      | <b>Language sub-total</b>   | <b>20</b>    |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>TOTAL MARKS:</b>  |   | <b>/100</b>  |  |  |  |   |  |  |  |  |  |  |  |  |  |  |  |  |

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

|                 |      |   |          |   |            |   |
|-----------------|------|---|----------|---|------------|---|
| Mark allocation | Self |   | Educator |   | Final mark |   |
|                 |      | 5 |          | 5 |            | 5 |

**Rubric 15: Assessment of poster communication skills**

| Criteria             | Range                |                                       |                                   | Comments                   |
|----------------------|----------------------|---------------------------------------|-----------------------------------|----------------------------|
|                      | 0                    | 1                                     | 2                                 |                            |
| <b>Content</b>       |                      |                                       |                                   |                            |
| 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                 |                            |
| <b>Presentation</b>  |                      |                                       |                                   |                            |
| 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/layout  | 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                |                      |                                       |                                   | <b>Total:</b><br>_____/ 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<br>Outstanding                          | 4<br>Highly<br>competent   | 3<br>Competent                             | 2<br>Not yet<br>competent | 1<br>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                |
| <b>Comments:</b>                     |   |                            |  |                           |                       |
| Total mark: ____/25                  |   |                            |  |                           |                       |

### Rubric 18: Assessment of questionnaire design and conducting a survey

| Criteria  | Range  |  |  |  |   |
|---|--|--|--|--|---|
|   | 5<br>Outstanding   | 4<br>Highly<br>competent                   | 3<br>Competent                           | 2<br>Not yet<br>competent              | 1<br>Not achieved                         |
| <b>Questionnaire design</b>                             |  |  |  |  |   |
| 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                        |
| <b>Conducting survey</b>                                |  |  |  |  |   |
| 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 requirements               | Insufficient number of responses       | Too few responses to draw any conclusions |
| <b>Comments:</b>  |  |  |  |  |   |
| 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?   | <table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>   |  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |  |  |
| What can you do better now?                          | <table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>   |  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |  |  |
| What improvements would you still like to make?      | <table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>   |  |  |  |  |  |  |  |  |  |  |
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| Write a short paragraph reflecting on your progress. | <table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> </table> |  |  |  |  |  |  |  |  |  |  |
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**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.

| <b>Who did the assessment?</b>                |  |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|--|
| Self-assessment                               |  |  |  |  |  |  |  |  |  |  |
| Peer assessment                               |  |  |  |  |  |  |  |  |  |  |
| Group assessment                              |  |  |  |  |  |  |  |  |  |  |
| Lecturer assessment                           |  |  |  |  |  |  |  |  |  |  |
| Other   |  |  |  |  |  |  |  |  |  |  |
| <b>What evidence did the student produce?</b> |  |  |  |  |  |  |  |  |  |  |
| 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 3 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:<br><br>SIM |

### 2. specifications for the external assessment in entrepreneurship - 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 paper 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 3 | KNOWLEDGE AND COMPREHENSION | APPLICATION | ANALYSIS, SYNTHESIS AND EVALUATION |
|---------|-----------------------------|-------------|------------------------------------|
|         | 40%                         | 40%         | 20%                                |

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: Monitor and control office supplies 20 marks

Question 2: Manage a diary for self and others 20 marks

Question 3: Coordinate meetings, minor events and travel arrangements 40 marks

Question 4: Monitor and control the receiving and satisfaction of visitors 20 marks

Total marks: 100 marks

### 3. assessment guidelines

Topic 1: Plan, monitor and control an information system

| Subject outcomes  | Assessment standards  | Learning outcomes   | Assessment Tasks/Activities      |
|---|---|---|----------------------------------|
| Plan, monitor and control and information system in a business environment. | Plan storage and retrieval system                             | <ul style="list-style-type: none"> <li>• Structural and operational needs are identified.</li> <li>• Procedures for the storage and retrieval of manual and computerised records are determined.</li> <li>• According to organisational policies and procedures.</li> <li>• Methodologies and quality control procedures for checking, tracking, securing and maintaining.</li> <li>• The storage and retrieval system are determined.</li> <li>• Archiving processes are identified and procedures for archive storage are planned accordingly.</li> <li>• Classification methodologies are determined.</li> </ul> | Demonstrations<br>SIM, Classroom |
|   | Monitor the implementation of the filing and retrieval system | <ul style="list-style-type: none"> <li>• Quality control to monitor sorting, filing and retrieval of documentation is carried out according to organisational requirements.</li> <li>• Organisational policy for transfer, archive and disposal is followed.</li> <li>• Procedures for ensuring manual or computerised records are followed.</li> </ul>   |                                  |

|  |   |  |  |
|--|---|--|--|
|  |   | <ul style="list-style-type: none"> <li>The importance of maintaining up-to-date and accurate records of paper-based documentation is explained.</li> </ul>   |  |
|  | Controlle the implementation of a filing and retrieval system | <ul style="list-style-type: none"> <li>Filing is complete, accurate, in the required format, location and time frame.</li> <li>Incorrectly filed documents are identified and filed correctly.</li> <li>Areas for improvement are communicated to the staff responsible.</li> <li>Procedures for improving storage and retrieval systems are planned and updated on an ongoing basis.</li> </ul> |  |

**Topic 2: Monitor and control office supplies**

| Subject outcomes                     | Assessment standards           | Learning outcomes  | Assessment Tasks/Activities    |
|--------------------------------------|--------------------------------|--|--------------------------------|
| Monitor and control office supplies. | Monitor office supplies levels | <ul style="list-style-type: none"> <li>Office supplies levels are identified and recorded.</li> <li>Office supply levels are ascertained and compared to required levels.</li> <li>Records are checked for compliance with organisational requirements.</li> <li>Remedial action is taken to rectify office supply levels</li> </ul> | Practical exercises<br><br>SIM |

|  |   |   |  |
|--|---|---|--|
|  | Maintain office supplies processes and procedures       | <ul style="list-style-type: none"> <li>Office supply processes and procedures are monitored and evaluated.</li> <li>Out-of-line situations are identified and highlighted.</li> <li>Remedial action is taken to bring office supply processes and procedures back in line.</li> <li>Areas for improvement are identified and recommendations are made to the authorised individuals.</li> </ul> |  |
|  | Monitor and control the distribution of office supplies | <ul style="list-style-type: none"> <li>Office supplies levels are identified and recorded.</li> <li>Office supply levels are ascertained and compared to required levels.</li> <li>Records are checked for compliance with organisational requirements.</li> <li>Remedial action is taken to rectify office supply levels.</li> </ul>   |  |

**Topic: 3**      **Handling of Petty Cash**

| Subject outcomes                                 | Assessment standards                        | Learning outcomes   | Assessment Tasks/Activities                  |
|--|---|---|--|
| Handling petty cash within an office environment | Disburse money for Petty Cash transactions. | <ul style="list-style-type: none"> <li>Source documents are identified correctly.</li> <li>Request for Petty Cash is received, validated and</li> </ul> | Tasks, Practical exercise<br>SIM, E-learning |

|  |                                    |  |  |
|--|------------------------------------|--|--|
|  |                                    | <p>authorised according to company policy.</p> <ul style="list-style-type: none"> <li>• Cash is issued as per authorised request.</li> <li>• Cash slip and change received is reconciled accurately.</li> <li>• Petty Cash voucher is completed and till slip is attached in accordance with purchases made.</li> </ul>  |  |
|  | Recording Petty Cash transactions. | <ul style="list-style-type: none"> <li>• The Petty Cash vouchers are numbered in sequence according to company policy.</li> <li>• Petty Cash vouchers are correctly recorded in the Petty Cash Book or Petty Cash Journal.</li> <li>• Petty Cash analysis columns are totalled accurately.</li> <li>• Petty Cash vouchers are correctly filed according to company policy.</li> </ul>                                    |  |
|  | Restore imprest amount.            | <ul style="list-style-type: none"> <li>• The amount of the Petty Cash float is indicated as required by company.</li> <li>• Amount required to restore imprest is calculated correctly.</li> <li>• Money in cash box is reconciled with Petty Cash Book balanced.</li> <li>• Amount required is requested according to required coins and notes.</li> <li>• Coins and notes received is counted and placed in</li> </ul> |  |

|  |   |   |  |
|--|---|---|--|
|  |   | cash box.   |  |
|  | Controlle procedures for Petty Cash are adhered to. | <ul style="list-style-type: none"> <li>• Petty Cash float is secured according to company policy.</li> <li>• The petty Cash float is required reconciled with Petty Cash Book.</li> <li>• Discrepancies are investigated and corrected within a reasonable period of time.</li> <li>• Discrepancies arising from the reconciliation of Petty Cash are either resolved or referred to the appropriate person.</li> </ul> |  |

**Topic 4: Manage a diary for self and others**

| Subject outcomes                    | Assessment standards                                   | Learning outcomes   | Assessment Tasks/Activities |
|-------------------------------------|--|---|-----------------------------|
| Manage a diary for self and others. | Demonstrate the ability to manage a diary              | <ul style="list-style-type: none"> <li>• The importance and need for accurate diary information is explained.</li> <li>• Diary is completed neatly and legibly.</li> <li>• Evidence that the diary is referred to daily is demonstrated.</li> </ul> | Practical exercises<br>SIM  |
|                                     | Answer telephone according to organisational standards | <ul style="list-style-type: none"> <li>• .Appointments are prioritised according to requirements.</li> <li>• Appointments are correctly entered and are prioritised</li> </ul>  |                             |

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|  |  | <ul style="list-style-type: none"> <li>according to requirements.</li> <li>Cancelled or postponed appointments are actioned according to requirements.</li> <li>Diary is updated on an ongoing basis.</li> </ul>   |  |
|  | Communicate relevant diary information | <ul style="list-style-type: none"> <li>The importance of communicating accurate and relevant diary information is explained.</li> <li>Diary information is communicated to all stakeholders within agreed time frames.</li> <li>Appointments are confirmed with all stakeholders within agreed time frames.</li> <li>Alterations to the diary are communicated to all stakeholders within agreed time frames.</li> </ul> |  |

**Topic 5: Coordinate meetings, minor events and travel arrangements**

| Subject outcomes   | Assessment standards                                   | Learning outcomes   | Assessment Tasks/Activities                 |
|--|--|---|---|
| Coordinate meetings, minor events and travel arrangements. | Identify a date, venue and time for a meeting or event | <ul style="list-style-type: none"> <li>A range of dates for meeting/event is provided to attendees.</li> <li>Suitable dates and venues are determined based on responses to range of dates provided.</li> <li>Meeting/event is booked and confirmed with attendees in writing.</li> </ul> | Practical exercise, Tasks<br>SIM, Classroom |

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|  |  | <ul style="list-style-type: none"> <li>All related documentation is forwarded to the attendees.</li> </ul>  |  |
|  | Arrange venue and catering                           | <ul style="list-style-type: none"> <li>Venue is selected and booked.</li> <li>Process of selecting venue is described.</li> <li>Special arrangements, logistics, meeting room layout and equipment required are confirmed with the venue provider.</li> <li>Process of selecting date, caterer and menu is described, taking into consideration religious and dietary requirements.</li> <li>Agenda for meeting/event is forwarded to venue provider and caterers so that correct times for meals and breaks can be adhered to.</li> <li>Venue and caterers are notified in writing and deposits paid.</li> </ul> |  |
|  | Make travel, car hire and accommodation arrangements | <ul style="list-style-type: none"> <li>Travel, car hire and accommodation requirements for all attendees are determined.</li> <li>Suitable accommodation is secured and bookings confirmed in writing.</li> <li>Car hire facilities are identified and confirmed in writing.</li> </ul>   |  |

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|  |   | <ul style="list-style-type: none"> <li>• Travel arrangements are made and all necessary documentation forwarded to the attendees.</li> <li>• Invoices relating to travel, car hire and accommodation are processed.</li> <li>• Any relevant advance disbursements for travel, car hire or accommodation are processed</li> </ul>  |  |
|  | Assemble and distribute documentation for meeting or event in good/sufficient time to attendees | <ul style="list-style-type: none"> <li>• Deadline date for receipt of documentation from contributors is established according to agreed time frames.</li> <li>• Deadline date is communicated to contributors.</li> <li>• Documents are assembled, copied and collated.</li> <li>• Relevant documents are timeously distributed in hard or electronic form to participants.</li> </ul> |  |

**Topic 6: Monitor and control the receiving and satisfaction of visitors**

| Subject outcomes  | Assessment standards               | Learning outcomes   | Assessment Tasks/Activities    |
|---|------------------------------------|---|--------------------------------|
| Monitor and control the receiving and satisfaction of visitors. | Oversee the reception of visitors. | <ul style="list-style-type: none"> <li>• Visitors are received according to the organisational standards.</li> <li>• All documents/deliveries are processed according to organisational standards.</li> <li>• Areas of non-conformance</li> </ul> | Practical exercises<br><br>SIM |

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|  |  | <p>are identified, noted, and recorded for possible remedial action.</p> <ul style="list-style-type: none"> <li>• Areas of improvements are identified to incumbents.</li> </ul>   |  |
|  | Ensure that visitors are consulted according to organisational requirements. | <ul style="list-style-type: none"> <li>• Visitors are consulted as per company policy.</li> <li>• Areas of non-compliance are identified, noted, and recorded for remedial action.</li> <li>• Remedial actions are identified and presented for implementation.</li> </ul>   |  |
|  | Monitor visitors' satisfaction   | <ul style="list-style-type: none"> <li>• Visitors' satisfaction is monitored at pre-determined intervals.</li> <li>• Feedback is obtained from visitors on their satisfaction.</li> <li>• Feedback is evaluated and analysed to determine satisfaction levels.</li> <li>• The necessary steps are taken to improve the level of satisfaction.</li> </ul> |  |

**Topic 7: Process incoming and outgoing telephone calls**

| Subject outcomes                               | Assessment standards                      | Learning outcomes   | Assessment Tasks/Activities           |
|--|---|---|---------------------------------------|
| Process incoming and outgoing telephone calls. | Demonstrated knowledge and understanding. | <ul style="list-style-type: none"> <li>• Describe non-disclosable information and the reasons it is classified as non-disclosable.</li> <li>• Stress the importance of acknowledging callers and</li> </ul> | <p>Practical exercises</p> <p>SIM</p> |

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|  |  | <p>keeping them informed of reasons for delays.</p> <ul style="list-style-type: none"> <li>• Describe various ways of finding telephone numbers.</li> <li>• Explain the difference in the way a person answers their own private telephone and the way the switchboard is answered in terms of assisting customers.</li> <li>• Describe standard telephone etiquette on answering calls and making calls.</li> <li>• Describe the use of body language in communicating with others while on a call and the reason why it is important.</li> <li>• Describe methods for dealing with abusive callers.</li> <li>• Describe methods for dealing with emergency situations.</li> </ul> |  |
|  | <p>Demonstrated ability to make decisions about practice and to act accordingly.</p> | <ul style="list-style-type: none"> <li>• Prepare all necessary documentation and equipment (computers, writing material, notes etc.) prior to making any outgoing calls.</li> <li>• Given a telephonic request from a customer, decide whether to help or to transfer the call to another person in the organisation and explain why.</li> <li>• Ask probing questions, find out the purpose of the call</li> </ul>   |  |

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|                           |   | <p>and transfer the caller to another person who may be more able to assist.</p> <ul style="list-style-type: none"> <li>• Take messages for others in the organisation</li> <li>• (including whom the message is for, who called, the date &amp; time, a short description of the call and contact details of the caller).</li> <li>• Given the nature of the call, decide whether to take a detailed message or to offer to have the customer called back.</li> <li>• Given incoming calls, transfers and outgoing calls, deal with the callers politely and in keeping with the organisation's image and standard telephone etiquette.</li> <li>• Deal with calls quickly and politely, keeping other calls holding as little as possible.</li> <li>• Given a specific situation, decide what information is disclosable or non-disclosable and explain why.</li> </ul> |  |
| <p>Adapt performance.</p> | <p>Demonstrated ability to learn from our actions</p> | <ul style="list-style-type: none"> <li>• Given that a new switchboard is being introduced into the organisation, suggest ways to learn the new system quickly and becoming competent.</li> </ul>  |  |

Topic 8: Monitor the reception area

| Subject outcomes           | Assessment standards  | Learning outcomes  | Assessment Tasks/Activities                       |
|----------------------------|---|--|---|
| Monitor the reception area | Monitor the maintenance of a clean and safe reception area as per organisational requirements | <ul style="list-style-type: none"> <li>• Implementation of the housekeeping standards is maintained according to workplace policy.</li> <li>• Housekeeping operations are maintained to ensure no disruption to operational services.</li> <li>• Areas not meeting the required standards are identified and recorded for possible remedial action.</li> <li>• Actions and procedures required to rectify substandard areas are instituted and monitored to ensure minimum standards are met.</li> </ul> | <p><b>Practical demonstrations</b></p> <p>SIM</p> |
|                            | Monitor presentation of reception area  | <ul style="list-style-type: none"> <li>• Presentation of reception area is maintained according to organisational standards.</li> <li>• Areas of non-conformance are identified, noted and recorded for possible remedial action.</li> <li>• Remedial actions are identified and presented for implementation.</li> <li>• Areas of improvement are</li> </ul>  |   |

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|  |   | communicated to incumbents.   |  |
|  | Monitor the implementation of security procedures in reception area | <ul style="list-style-type: none"> <li>• Security procedures are outlined and all reception personnel are briefed verbally and a written summary provided to them.</li> <li>• Visitors cards and permits are obtained from security personnel.</li> <li>• Firearm procedures are monitored and maintained as per workplace policy.</li> <li>• Discrepancies and problems are reported and rectified to ensure safety of workplace.</li> </ul> |  |

## Office Practice level 3 – 40 week plan

| Week    | TOPIC<br>OFFICE PRACTICE<br>LEVEL 3                   | SO/<br>LO<br>Ref | SUBJECT & LEARNING OUTCOMES  | H<br>r<br>s | ASSESSMENT TASKS (PoE)  |
|---------|---|------------------|--|-------------|---|
| 1       | Registration/induction                                |                  |  | 5           |   |
| 2       | Registration/induction                                |                  |  | 5           |   |
| 3<br>to | Plan, monitor and control an information system (10%) | SO1<br><br>LO1.1 | Plan Storage and Retrieval System<br><br>Identify structural and operational needs | 22<br><br>4 | List the items which you need to know about to establish the storage requirements. Group. |

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| 6 |  | <p>LO1.2 Determine procedures for the storage and retrieval of manual and computerised records according to organizational policies and procedures</p> <p>LO1.3 Maintain methodologies and quality control procedures for checking, tracking and securing.</p> <p>LO1.4 Determine the storage and retrieval system.</p> <p>LO1.5 Identify archiving processing procedures for archive storage.</p> <p>LO1.6 Determine classification methodologies.</p>   | <p>4 Hard-copy compared to computer filing. Individual.</p> <p>2 Describe files within categories. Individual</p> <p>1 Reasons to use information. Individual.</p> <p>2 Establish legal requirements for retention of documents.</p> <p>1 Practical group exercise to set up a classification method. Group.</p>                          |
|   |  | <p><b>SO2 Monitor the implementation of the filing and retrieval system.</b></p> <p>LO2.1 Monitor that quality control for sorting, filing and retrieval of documentation is carried out according to organizational requirements.</p> <p>LO2.2 Follow organisational policy for transfer, archival and disposal.</p> <p>LO2.3 Follow procedures for securing manual and computerised records.</p> <p>LO2.4 Explain the importance of maintaining up-to-date and accurate records of paper-based documentation.</p> | <p>1 Group exercise to identify how to conduct a survey.</p> <p>1 Preparing a policy document for transfer, archival and disposal of information. Individual.</p> <p>1 List examples of hard-copy and computer security problems and their consequences. Group.</p> <p>1 Class test on Importance of hard copy documents. Individual.</p> |
|   |  | <p><b>SO3 Control the implementation of a filing and retrieval system.</b></p> <p>LO3.1 Accurately file documents in the required format, location and time frame.</p> <p>LO3.2 Identify incorrectly filed documents and file them correctly.</p> <p>LO3.3 Communicate areas for improvement to the staff responsible.</p>  | <p>1 Group workshop exercise on filing of documents.</p> <p>1 Group practical exercise on searching for mis-filed documents</p> <p>1 Write a memo explaining a filing procedure improvement. Individual.</p>  |

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|                |   | LO3.4      | Plan and update the procedures for improving storage and retrieval systems on an ongoing basis. | 1         | Class test on theoretical content.  |
| 7<br>to<br>10  | <b>Monitor and control office supplies(10%)</b> | <b>SO1</b> | <b>Monitor and control the distribution of office supplies.</b>                                 | <b>17</b> |   |
|                |   | LO1.1      | Identify and record office supplies levels.   | 4         | Establishing stock items, minimum stock levels and monthly usage. Individual.                   |
|                |   | LO1.2      | Ascertain and compare office supply levels to required levels                                   | 3         | Recording stock levels. Individual.   |
|                |   | LO1.3      | Check records for compliance with organizational requirements.                                  | 1         | Obtaining and determining stock item numbers. Group   |
|                |   | LO1.4      | Take remedial action to rectify office supply levels.   | 1         | Problems and their effects. Individual.   |
|                |   | <b>S02</b> | <b>Maintain office supplies processes and procedures.</b>                                       |           |   |
|                |   | LO2.1      | Monitor and evaluate office supply processes and procedures.                                    | 3         | Monitor office supplies processes. Individual.  |
|                |   | LO2.2      | Identify and highlight out of line situations.  | 2         | Out of line situations. Group.  |
|                |   | LO2.3      | Take remedial action to bring office supply procedures and processes back in line               | 1         | Security over office supplies. Group.   |
|                |   | LO2.4      | Identify and recommend areas for improvement to the authorised individuals.                     | 2         | Recommend areas for improvement. Individual.  |
| 11<br>to<br>18 | <b>Handling of Petty Cash (20%)</b>             | <b>SO1</b> | <b>Disburse money for petty cash transactions.</b>  | <b>36</b> |   |
|                |   | LO1.1      | Identify source documents correctly.  | 1         | Identify the source documents correctly. Individual   |
|                |   | LO1.2      | Receive request for petty cash, validated and authorised according to company policy.           | 2         | How to fill in petty cash vouchers when a request is received from a staff member. Individual.  |
|                |   | LO1.3      | Issue authorised cash as per request.   | 1         | How to issue cash on request. Group.  |
|                |   | LO1,4      | Receive and reconcile cash slips and change accurately.   | 3         | How to fill in the PCV when the cash slip or invoice and change are returned to you. Individual |

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|  |  | LO1.5 Complete Petty Cash Voucher and see the till slip is attached in accordance with purchasers made         | 1 | How to fill in the PCV when making the purchase. Group.  |
|  |  | <b>SO2 Recording petty cash transactions.</b>  |   |  |
|  |  | LO2.1 Number the cash slips in sequence according to company policy.   | 1 | Prepare a list the months in the year in abbreviated format. Individual.   |
|  |  | LO2.2 Record petty cash vouchers correctly in the petty cashbook or petty cash Journal                         | 4 | How to record petty cash vouchers in the petty cash book. Individual.  |
|  |  | LO2.3 Total petty cash analysis columns accurately.  | 2 | How to total the petty cash analysis columns in the petty cash book. Individual.                                 |
|  |  | LO2.4 File petty cash vouchers correctly according to company policy.  | 1 | How to file petty cash vouchers in the petty cash file. Individual.  |
|  |  | <b>SO3 Restore imprest amount</b>  |   |  |
|  |  | LO3.1 Indicate the amount of the petty cash float as required by the company.                                  | 1 | Calculate the estimated amount of your new Petty cash float. Individual.   |
|  |  | LO3.2 Correctly calculate the required amount to restore balance.  | 2 | How to calculate the reimbursement amount when cash in the petty cash box is getting to a low level. Individual. |
|  |  | LO3.3 Reconcile money in cash box with petty cash book.  | 3 | Reconciling the cash in the petty cash box with the cash balance per the petty cash book. Individual.            |
|  |  | LO3.4 Request coins and notes according to the required amount.  | 2 | How to fill in a coinage analysis and count the cash accordingly. Individual.                                    |
|  |  | LO3.5 Count coins and notes received and place in cash box.  | 2 | How to count coins and notes in the petty cash box. Group.   |
|  |  | <b>SO4 Adhere to control procedures for petty cash.</b>  |   |  |
|  |  | LO4.1 Secure petty cash float according to company policy.   | 1 | Discussion on Petty Cash security. Group.  |
|  |  | LO4.2 Reconcile the petty cash float with the petty cash book.   | 4 | Explain the Petty Cash reconciliation process. Group.  |
|  |  | LO4.3 Investigate discrepancies and correct within a reasonable period of time.                                | 3 | Discussion on methods of checking for discrepancies. Group.  |
|  |  | LO4.4 Resolve and refer discrepancies arising from the reconciliation of petty cash to the appropriate person. | 2 | Complete Petty Cash write-up. Individual.  |

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| 19<br>to<br>23 | <b>Manage a diary for self and others (10%)</b> | <b>SO1 Demonstrate the ability to manage a diary.</b><br>LO1.1 Explain the importance and need for accurate diary information.<br>LO1.2<br>LO1.3 Complete diary neatly and legibly. Demonstrate the evidence that the diary is referred to on a daily basis.  | <b>18</b><br>1 The importance of keeping a diary. Group<br>Completing a diary. Individual. Communicate relevant diary information.<br>3 Group.<br>Demonstrate that the diary is referred to daily.<br>1 Individual and group pairs.   |
|                |   | <b>SO2 Answer telephone according to organisational standards.</b><br>LO2.1 Prioritise appointments according to requirements.<br>LO2.2 Enter appointments correctly and prioritise according to requirements. Action cancelled or postponed appointments according to requirements.<br>LO2.3<br>LO2.4 Update diary on an ongoing basis.  | 2 Confirmation and agreement regarding timeframes. Group role-play<br>Enter appointments correctly, prioritise according to requirements, update the diary and refer to it daily. Individual.<br>2<br>2 Group workshop exercise.<br>1 Group workshop exercise.  |
|                |   | <b>SO3 Communicate relevant diary information.</b><br>LO3.1 Explain the importance of accurately communicating relevant diary information.<br>LO3.2 Communicate diary information to all stakeholders within agreed timeframes.<br>LO3.3 Confirm appointments with all stakeholders within agreed timeframes. Communicate alterations to the diary to all stakeholders within agreed timeframes.<br>LO3.4 | 1 Confirmation and agreement regarding my timeframes<br>Communicate diary information to all stakeholders within agreed time frames.<br>2 Individual.<br>Communicate diary information to all stakeholders within agreed time frames.<br>1 Individual.<br>2 Communicate alterations to the diary to all stakeholders. Individual. |

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| 24<br>to<br>27 | Coordinate meetings, minor events and travel arrangements (20%) | <p><b>SO1 Identify date, venue and time for a meeting or event.</b></p> <p>LO1.1 Provide a range of dates and venues for the meetings/event to attendees.</p> <p>LO1.2 Provide suitable dates and venues based on response to ranges.</p> <p>LO1.3 Book and confirm meetings/event with attendees in writing.</p> <p>LO1.4 Forward all related documentation to the attendees.</p>  | <p><b>33</b></p> <p>2 Provide a range of suitable dates and venues for the meeting or event to attendees. Group.</p> <p>3 Provide a range of suitable dates and venues for the meeting or event to attendees. Group.</p> <p>3 Book and confirm the meeting with the attendees. Individual.</p> <p>3 Forward the agenda for the event to the parties concerned and pay the required deposits. Individual.</p> <p>1</p>   |
|                |   | <p><b>SO2 Arrange venue and catering</b></p> <p>LO2.1 Select and book venue.</p> <p>LO2.2 Describe the process of selecting a venue.</p> <p>LO2.3 Confirm special arrangements, logistics, meeting room layout and equipment required with the new provider.</p> <p>LO2.4 Describe the processes of selecting a date, caterer and menu, taking into consideration religious and dietary requirements.</p> <p>LO2.5 Forward agenda for meetings/event to the new provider and caterers so that correct times for meals and breaks can be adhered to.</p> <p>LO2.6 Notify venue and caterers in writing and pay deposits.</p> | <p>1 Select and book venue. Describe the process of selecting a venue. Individual.</p> <p>1 Select and book venue. Describe the process of selecting a venue. Individual.</p> <p>3 Describe the process of selecting a date, caterer and menu. Individual.</p> <p>2 Describe the process of selecting a date, caterer and menu. Individual.</p> <p>3 Forward the agenda for the event to the parties concerned and pay the required deposits. Individual.</p> <p>1 Forward the agenda for the event to the parties concerned and pay the required deposits. Individual.</p> |
|                |   | <p><b>SO3 Make travel, car hire and accommodation arrangements</b></p> <p>LO3.1 Determine travel, car hire and accommodation requirements for all.</p> <p>LO3.2 Confirm that suitable accommodation is secured and confirm booking in</p>   | <p>3 Travel, car hire and accommodation arrangements. Group &amp; individual.</p> <p>1 Travel, car hire and accommodation arrangements. Group &amp; individual.</p>   |

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|                |   | writing.   |           |  |
|                |   | LO3.3 Identify and confirm car hire facilities in writing.   | 1         | Travel, car hire and accommodation arrangements. Group & individual.   |
|                |   | LO3.4 Forward travel arrangements and all necessary documentation to the attendees.                          | 1         | Travel, car hire and accommodation arrangements. Group & individual.   |
|                |   | LO3.5 Process invoices related to travel, car hire and accommodation.  | 1         | Process invoices and any advance disbursements for travel, car hire and accommodation. Group & individual.                 |
|                |   | LO3.6 Process any relevant advance disbursements for travel, car hire or accommodation.                      | 1         | Process invoices and any advance disbursements for travel, car hire and accommodation. Group & individual.                 |
|                |   | <b>SO4 Assemble and distribute documentation for meeting or event in good/sufficient time to attendees.</b>  |           |  |
|                |   | LO4.1 Establish deadline date for receipt of documentation from contributors according to agreed timeframes. | 1         | Establish deadline date for the receipt of documentation from contributors according to agreed timeframes. Group and pair. |
|                |   | LO4.2 Communicate deadline date contributors.  | 1         | Communicate the deadline to the contributors. Individual.  |
|                |   | LO4.3 Assemble, copy and collate documents.  | 2         | Assemble and collate the necessary documents and Timeously distribute them. Group pair.                                    |
|                |   | LO4.4 Timeously distribute relevant documents in hard or electronic form to participants.                    | 1         | Assemble and collate the necessary documents and Timeously distribute them. Group pair.                                    |
| 28<br>to<br>30 | <b>Monitor and control the receiving and satisfaction of visitors (10%)</b> | <b>SO1 Oversee the reception of visitors.</b>  | <b>14</b> |  |
|                |   | LO1.1 Receive visitors according to the organisational standards.  | 1         | Group workshop exercise.   |
|                |   | LO1.2 Process all documents/deliveries according to the organisational standards.                            | 1         | Group workshop exercise.   |

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|                |  | LO1.3 Identify, note and record areas of non conformance for possible remedial action.   | 2         | Group workshop exercise.   |
|                |  | LO1.4 Identify areas of improvement.   | 2         | Collect, analyse and organise information, in their team.  |
|                |  | <b>SO2 Ensure that visitors are consulted according to organizational requirements.</b>  |           |  |
|                |  | LO2.1 Consult visitors as per company policy.  | 1         | Group workshop exercise.   |
|                |  | LO2.2 Identify, note and recording areas of non-compliance for remedial action.  | 1         | Collect, analyse and organise information, in their team.  |
|                |  | LO2.3 Identify remedial actions and present for implementation.  | 1         | Collect, analyse and organise information, in their team.  |
|                |  | <b>SO3 Monitor visitors' satisfaction.</b>   |           |  |
|                |  | LO3.1 Monitor visitors' satisfaction at predetermined intervals.   | 1         | Demonstrate ability to learn from own actions and own performance. (Individual   |
|                |  | LO3.2 Obtain feedback from visitors on their satisfaction.   | 1         | Group workshop exercise.   |
|                |  | LO3.3 Evaluate and analyse feedback to determine satisfaction levels.  | 2         | Apply and evaluate information.  |
|                |  | LO3.4 Take the necessary steps to improve the level of satisfaction.   | 1         | Class test on theoretical content.   |
| 31<br>to<br>34 | <b>Process incoming and outgoing calls (10%)</b> | <b>SO1 Demonstrate knowledge and understanding of telephone etiquette.</b>   | <b>22</b> |  |
|                |  | LO1.1 Describe nondisclosable information and the reasons it is classified as nondisclosable.  | 2         | EVALUATE YOURSELF AS A COMMUNICATOR. Individual. Discuss why you think the above should not be disclosed to clients. Individual. |
|                |  | LO1.2 Stress the importance of acknowledging callers and keeping them informed of reasons for delays.  | 1         | put a caller on hold and roleplays. Group.   |
|                |  | LO1.3 Describe various ways of finding telephone numbers.  | 1         |  |
|                |  | LO1.4 Explain the difference in the way a person answers their own private telephone number and the way the switchboard is answered in terms of assisting customers. | 1         | Good telephone etiquette at work. Individual.<br>Discuss how you answer your telephone. Group.                                   |

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|  |  | <p>LO1.5 Describe standard telephone etiquette on answering calls and making calls.</p> <p>LO1.6 Describe the use of body language in communicating with others while on the call and the reason why it is important.</p> <p>LO1.7 Describe methods for dealing with abusive callers.</p> <p>LO1.8 Describe methods for dealing with emergency situations.</p>   | <p>1 Taking messages. Individual. Deciding whether to take a message or offer to call back. Individual.</p> <p>2</p> <p>1 Dealing with an abusive caller. Individual. Voice awareness. Group.</p> <p>2 Dealing with emergencies. Individual.</p>   |
|  |  | <p><b>SO2 Demonstrate ability to make decisions about practice and to act accordingly.</b></p> <p>LO2.1 Prepare all necessary documentation and equipment (computers, writing material, notes etc) prior to making any outgoing calls.</p> <p>LO2.2 Given a telephonic request from a customer, decide whether to help or to transfer the call to another person in the organisation and explain why.</p> <p>LO2.3 Ask probing questions, find out the purpose of the call and transfer the call to another person who may be more able to assist.</p> <p>LO2.4 Take messages for others in the organisation (including whom the message is for, who called, the date and time, a short description of the call and contact details of the caller).</p> <p>LO2.5 Given the nature of the call, decide whether to take a detailed message or to offer to have the customer called back.</p> <p>LO2.6 Given incoming calls, transfers and outgoing calls, deal with the callers politely and in keeping with the organisation's image and standard</p> | <p>2 Individual role-play exercise</p> <p>1 Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs.</p> <p>2 Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs.</p> <p>1 Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs.</p> <p>1 Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs.</p> <p>1 Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs.</p> |

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|                |   | telephone etiquette.   |           |  |
|                |   | LO2.7 Deal with calls quickly and politely, keeping other callers holding as little as possible.   | 1         | Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs. |
|                |   | LO2.8 Given a specific situation, decide what information is disclosable or nondisclosable and explain why.  | 1         | Deciding whether to help, transfer the call, take a message or offer to call back. Group in pairs. |
|                |   | <b>SO3 Demonstrate ability to learn from own actions and own performance.</b>  |           |  |
|                |   | LO3.1 Given that a new switchboard is being introduced into the organisation, suggest ways to learn the new system quickly and become competent.     | 1         | Demonstrate ability to learn from own actions and own performance. Individual                      |
| 35<br>to<br>38 | <b>Monitor the reception area (10%)</b> | <b>SO1 Monitor the maintenance of a clean and safe reception area as per organizational requirements.</b>  | <b>18</b> |  |
|                |   | LO1.1 Maintain the implementation of the housekeeping standards according to workplace policy.   | 2         | A visit to the reception desk. Group.  |
|                |   | LO1.2 Maintain housekeeping operations to ensure no disruption to operational services.  | 1         | Clean and tidy reception area. Group.  |
|                |   | LO1.3 Identify areas not meeting the required standards and record for possible remedial action.   | 2         | Clean and tidy reception area. Group.  |
|                |   | LO1.4 Require rectifying actions and procedures so that the substandard areas are identified and monitored to ensure that minimum standards are met. | 1         | Clean and tidy reception area. Group.  |
|                |   | <b>SO2 Monitor presentation of reception area.</b>   |           |  |
|                |   | LO2.1 Maintain presentation of reception area according to organisational standards.   | 1         | The presentation of the reception area. Group visit.   |

|    |                              |  |   |   |
|----|------------------------------|--|---|---|
|    |                              | LO2.2 Identify, note and record areas of nonconformance for possible remedial action.  | 1 | The presentation of the reception area : checklist. Individual. |
|    |                              | LO2.3 Identify and present remedial actions for implementation.  | 1 | The presentation of the reception area. Group.                  |
|    |                              | LO2.4 Communicate areas of improvement.  | 1 | The presentation of the reception area. Group.                  |
|    |                              | <b>SO3 Monitor the implementation of security procedures in reception area.</b>  |   |   |
|    |                              | LO3.1 Brief all reception personnel verbally on security procedures and provide them with a written summary.                                     | 3 | Security in the workplace. Group.                               |
|    |                              | LO3.2 Obtain visitors' cards and permits from security personnel.  | 1 |   |
|    |                              | LO3.3 Monitor and maintain firearm procedures per workplace policy. Report and rectify discrepancies and problems to ensure safety of workplace. | 1 | Weapons and other security issues                               |
|    |                              | LO3.4  | 3 | Role-play exercise. Group.                                      |
| 39 | <b>Examinations/Revision</b> |  | 5 |   |
| 40 | <b>Examinations/Revision</b> |  | 5 |   |

|  |           |      |
|--|-----------|------|
| TOTAL HOURS : TOPIC 1                                    | 22        | 12%  |
| TOTAL HOURS : TOPIC 2                                    | 17        | 9%   |
| TOTAL HOURS : TOPIC 3                                    | 36        | 20%  |
| TOTAL HOURS : TOPIC 4                                    | 18        | 10%  |
| TOTAL HOURS : TOPIC 5                                    | 33        | 18%  |
| TOTAL HOURS : TOPIC 6                                    | 14        | 8%   |
| TOTAL HOURS : TOPIC 7                                    | 22        | 12%  |
| TOTAL HOURS : TOPIC 8                                    | 18        | 10%  |
| TOTAL HOURS<br>REGISTRSTION/INDUCTION/REVISION/EX<br>AMS | <u>20</u> | 100% |
|  | 20        |      |
|  | <u>0</u>  |      |

## Office Data Processing level 3 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 3 | <b>KNOWLEDGE AND COMPREHENSION</b> | <b>APPLICATION</b> | <b>ANALYSIS, SYNTHESIS AND EVALUATION</b> |
|         | 10%                                | 80%                | 10%                                       |

The ff guidelines are offered for the setting of the Office Data Processing Level 3 exam:

|                              |   |
|------------------------------|---|
| Nature of paper              | : External (Only wordprocessing, must be tested the other functions can be tested in the SIM in the form of practical tasks that is filed in PoE) |
| Number of papers             | : 1   |
| Duration                     | : 2 hours   |
| Total mark allocation        | : 150 marks   |
| Number of sections           | : 1 sections  |
| Compulsory sections          | : Section A   |
| Total number of questions    | 4   |
| Mark allocation per question | Question 1: 50,<br>Question 2: 20,<br>Question 3: 30,<br>Question 4: 50,  |

### 3. assessment guidelines

Topic 1: Basic concept of computers

| Subject outcomes | Assessment standards  | Learning outcomes  | Assessment Tasks/Activities          |
|------------------|---|--|--------------------------------------|
| Getting Started  | <b>The necessary procedures for getting started are followed and computer concepts and use of software is demonstrated.</b> | <ul style="list-style-type: none"> <li>Know Computer Terms</li> <li>Discuss Computer Hardware</li> <li>Know the use of computer Accessories</li> </ul> | Practical<br>Computer Classroom, SIM |

|                              |  |  |  |
|------------------------------|--|--|--|
|                              | .  | <ul style="list-style-type: none"> <li>Identify the memory and Storage capacity of computer</li> <li>Demonstrate the use of computer software</li> </ul>   |  |
| Using Information Technology | The efficient using the internet and email is demonstrated.                    | <ul style="list-style-type: none"> <li>Demonstrate the use of Networks</li> <li>Use the Internet and Email</li> </ul>  |  |
| Computers in everyday life   | The efficient use of word processing as an everyday life tool is demonstrated. | <ul style="list-style-type: none"> <li>Apply word processing at home, work and in education</li> <li>Apply computers in everyday life</li> <li>Work Safely with computers</li> <li>Protecting their work</li> <li>Protecting their PC</li> </ul> |  |
| Legal issues                 | The identification of copyright is followed correctly.                         | <ul style="list-style-type: none"> <li>Identify copyright</li> <li>Identify and know the data protection act</li> </ul>  |  |

**Topic 2: File Management**

| Subject outcomes               | Assessment standards   | Learning outcomes   | Assessment Tasks/Activities          |
|--------------------------------|--|---|--------------------------------------|
| Finding out more               | .System information and settings is identified, and applied correctly. | <ul style="list-style-type: none"> <li>Use Help</li> <li>Identify and apply system information and settings.</li> </ul>   | Practical<br>Computer Classroom, SIM |
| Working with files and folders | The effective use of working with files and folders are demonstrated   | <ul style="list-style-type: none"> <li>Work with drives, files and folders</li> <li>Use Windows Explorer</li> <li>Effectively use my Computer</li> <li>Change their view</li> <li>Navigating their folders</li> </ul> |                                      |
| Managing your files            | The effective management of files are demonstrated.                    | <ul style="list-style-type: none"> <li>Manage their files</li> <li>Deleting and using the</li> </ul>  |                                      |

|                       |                                     |  |  |
|-----------------------|-------------------------------------|--|--|
|                       |                                     | <ul style="list-style-type: none"> <li>recycle bin</li> <li>Find Files</li> <li>Use Stiffy disks and flash drives</li> </ul> |  |
| Programs and printing | Effective printing must take place. | <ul style="list-style-type: none"> <li>Programs and printing</li> </ul>  |  |

**Topic 3: Word Processing**

| Subject outcomes  | Assessment standards   | Learning outcomes  | Assessment Tasks/Activities              |
|---|--|--|--|
| Apply correct mouse techniques<br>Know computer terminology | Mouse techniques is applied effectively and computer terminology is known. | <ul style="list-style-type: none"> <li>Start Word</li> <li>Apply word options</li> <li>Apply the Word Screen</li> <li>Entering &amp; Deleting Text</li> <li>Using the Mouse</li> <li>Saving, Closing, Opening and New</li> <li>Moving Around Documents</li> <li>Selecting Text</li> <li>Using Help in Word</li> <li>Correcting Mistakes</li> <li>Views</li> <li>Toolbars</li> <li>Print Preview</li> <li>Print properly</li> </ul> | Practical<br><br>Computer Classroom, SIM |
| Formatting text   | Suffiecient format of text is applied when working in a document.          | <ul style="list-style-type: none"> <li>Changing the Look of Text</li> <li>Aligning Text</li> <li>Special Text Effects</li> <li>Fields, Special Characters and Symbols</li> <li>Bullets and Numbering</li> <li>Customising Bullets</li> <li>Customising Numbers</li> <li>Indenting Text</li> <li>Demonstrate borders and shading</li> <li>Format Painter in toolbar</li> </ul>  |  |

|                               |   |  |  |
|-------------------------------|---|--|--|
|                               |   | <ul style="list-style-type: none"> <li>• Demonstrate the use of different styles</li> <li>• Apply hyphenation effectively</li> <li>• Demonstrate the correct way of automatic page numbering</li> </ul>  |  |
| <b>Working with long text</b> | Sufficient format of text is applied when working in a long document. | <ul style="list-style-type: none"> <li>• Move and copying text</li> <li>• Insert page breaks</li> <li>• Insert the appropriate margins</li> <li>• Demonstrate different line spacings</li> <li>• Insert headers and footers</li> <li>• Insert section breaks</li> <li>• Insert tabs and use appropriately</li> <li>• Spell and use the correct grammar application</li> <li>• Go To, Find &amp; Replace</li> <li>•</li> </ul>  |  |
| Tables                        | Demonstrate the use of tables effectively on an advanced level.       | <ul style="list-style-type: none"> <li>• Creating and Editing Tables</li> <li>• Insert Tables and Borders Toolbar</li> <li>• Adding Text to a Table</li> <li>• Selecting Parts of a Table</li> <li>• Inserting and Deleting Rows and Columns</li> <li>• Resizing Rows</li> <li>• Resizing Columns</li> <li>• Moving and Resizing the Whole Table</li> <li>• Gridlines and Borders</li> <li>• Insert borders</li> <li>• Apply shading</li> <li>• Merging and Splitting Cells</li> <li>• Demonstrate Table AutoFormat</li> </ul> |  |

|                   |   |  |  |
|-------------------|---|--|--|
| Graphics          | Demonstrate the use of graphics effectively on an advanced level. | <ul style="list-style-type: none"> <li>• Draw Shapes</li> <li>• Formatting Shapes</li> <li>• Insert 3D Shapes</li> <li>• Adding Text to Shapes</li> <li>• Adding Graphics</li> <li>• Using the Clipart Gallery</li> <li>• Changing the Text Wrapping</li> <li>• Selecting, Moving and Resizing Pictures Which are inline with the Text</li> <li>• Selecting, Moving and Resizing Pictures Which Are Floating over the Text</li> <li>• Customising Clipart</li> </ul> |  |
| Templates         | The effective use of templates are demonstrated.                  | <ul style="list-style-type: none"> <li>• Make of the templates word supplies</li> </ul>  |  |
| File management   | Apply sufficient file management in a document.                   | <ul style="list-style-type: none"> <li>• Save advanced</li> <li>• Search for Lost Files</li> </ul>   |  |
| Importing objects | The effective importing of objects is demonstrated.               | <ul style="list-style-type: none"> <li>• Import Excel Worksheets in Word</li> <li>• Import Excel Charts in Word</li> </ul>   |  |
| Mail merge        | The use of mail merge on an advanced level is demonstrated.       | <ul style="list-style-type: none"> <li>• Mail Merge</li> <li>• Creating a Data Document</li> <li>• Creating a Main Document</li> <li>• Carrying Out a Mail Merge</li> <li>• Mail Merge to Labels</li> <li>• Apply Query Options in a Mail Merge</li> <li>• Demonstrate Trouble Shooting Mail Merge</li> <li>• Insert Date &amp; Time</li> </ul>  |  |

Topic 4: Information and Communication using outlook

| Subject outcomes | Assessment standards | Learning outcomes | Assessment Tasks/Activities |
|------------------|----------------------|-------------------|-----------------------------|
|------------------|----------------------|-------------------|-----------------------------|

|                              |   |   |                                      |
|------------------------------|---|---|--------------------------------------|
| Introduction to the Internet | The Internet is used effectively and correctly.                 | <ul style="list-style-type: none"> <li>• Know the use of the Internet</li> </ul>  | Practical<br>Computer Classroom, SIM |
| Getting started on the Web   | The necessary use of the Web is demonstrated.                   | <ul style="list-style-type: none"> <li>• Identify and use the Internet Explorer Screen</li> <li>• Using Help in Internet Explorer</li> <li>• Customising the Screen</li> <li>• Demonstrate the use of Toolbars</li> <li>• Go to a Web Page</li> <li>• Browse the World Wide Web</li> <li>• Guess Web Pages</li> </ul> |                                      |
| Using search Engines         | The effective use of search engines is demonstrated.            | <ul style="list-style-type: none"> <li>• Make use of different Search Engines</li> <li>• Identify and demonstrate search engine tips</li> <li>• Go Directly to Search Engines</li> <li>• UseYahoo</li> <li>• Narrow their Search</li> </ul>   |                                      |
| Viewing and saving web pages | The effective viewing and saving of web pages are demonstrated. | <ul style="list-style-type: none"> <li>• View their favourite web pages</li> <li>• Save Web Pages</li> <li>• View and save different images on the web pages.</li> <li>•</li> </ul>   |                                      |
| Printing                     | The printing instructing is executed effectively.               | <ul style="list-style-type: none"> <li>• Print correctly (using all printing options)</li> <li>• Demonstrate the use of Page Setup</li> </ul>   |                                      |
| Getting started with Outlook | The opening of outlook is executed effectively.                 | <ul style="list-style-type: none"> <li>• Open Outlook</li> <li>• Use the outlook screen</li> <li>• Open the Inbox</li> <li>• Use Help in Outlook</li> <li>• Change the View</li> </ul>  |                                      |
| Working with Email           | The effective demonstration of emails is executed.              | <ul style="list-style-type: none"> <li>• Creat a Message</li> <li>• Receive Email</li> </ul>  |                                      |

|                   |   |   |  |
|-------------------|---|---|--|
|                   |   | <ul style="list-style-type: none"> <li>• Forwarding and Replying to Email</li> <li>• Sending and Receiving Attachments</li> <li>• Move and Copy Text</li> <li>• Sign their Email</li> <li>• Check their Spelling</li> </ul> |  |
| Organising Emails | Suitable organising of emails.              | <ul style="list-style-type: none"> <li>• Organise their Emails</li> <li>• Delete Email</li> <li>• Find Messages</li> </ul>  |  |
| Addresses         | Suitable organising of addresses of emails. | <ul style="list-style-type: none"> <li>• Organise your emails</li> <li>• Delete Email</li> <li>• Find Messages</li> </ul>   |  |

## Office Data Processing level 3 – 40 week plan

**PROGRAMME:** Certificate in Office Administration

**SUBJECT & LEVEL:** Office Data Processing Level 3

**Key for Shaded Areas:**

| TOPICS  | WEIGHTED VALUE |
|---|----------------|
| Basic concept of computers                    | 20%            |
| File Management                               | 20%            |
| Word Processing                               | 40%            |
| Information and Communication using 'Outlook' | 20%            |
| <b>TOTAL</b>                                  | <b>100</b>     |

| Week | Unit   | Assessment standards   | Sections   | Assessment Tasks/Activities                                   | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|--|--|--|---|-------------------------|-----------------|-----------------------------|
| 1    | <b>Topic 1: Basic Concepts of Computers</b><br>Introduction to computers | Computer concepts are understood and explained. The necessary procedures for getting started are followed and the use of software is demonstrated. | General Concepts<br><br>Hardware<br><br>Software<br><br>Information Technology<br><br>Types of computers<br><br>Main parts of personal computer<br><br>Computer performance<br><br>Computer accessories<br><br>Input devices<br><br>Output devices<br><br>Additional cards and items | Practical<br><br>Computer Classroom, SIM<br><br>Activity 1 -2 |                         |                 |                             |
| 2    |  |  | Memory and storage capacity of computers<br><br>Memory measurements  | Practical<br><br>Computer Classroom, SIM                      |                         |                 |                             |

| Week | Unit                                   | Assessment standards                                      | Sections   | Assessment Tasks/Activities                            | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|--|---|--|--|-------------------------|-----------------|-----------------------------|
|      |  |   | Units of memory<br>Memory<br>Storage<br>The use of computer software<br>Types of software<br>Graphical user interface<br>Systems development | Activity 3 – 4   |                         |                 |                             |
| 3    | Use information technology effectively | The efficient use of internet and e-mail is demonstrated. | Demonstrate the use of networks<br>LAN's, WAN's and Client/Server relationships<br>Advantages of a networks<br>Disadvantages of a network    | Practical<br>Computer Classroom, SIM<br>Activity 5 – 7 |                         |                 |                             |
| 4    |  |   | Intranet and extranets<br>The internet<br>The telephone network  | Practical<br>Computer Classroom,                       |                         |                 |                             |

| Week | Unit  | Assessment standards  | Sections   | Assessment Tasks/Activities                              | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|---|---|--|--|-------------------------|-----------------|-----------------------------|
|      |   |   | in computing<br>Cellular networks<br>Common terms related to connectivity  | SIM<br>Activity 9 – 10                                   |                         |                 |                             |
| 5    | Use computers effectively in everyday life                        | The efficient use of word processing as an everyday life tool is demonstrated.                  | Computers at work<br>Work safely with computers<br>Protecting your work<br>Protecting your PC                          | Practical<br>Computer Classroom, SIM<br>Activity 11 - 17 |                         |                 |                             |
| 6    | Deal with legal issues  | The principles of copyright and the data protection Act are understood and explained correctly. | Identify copyright<br>Software programs<br>Documents and text<br>Graphics<br>Identify and know the Data Protection Act | Practical<br>Computer Classroom, SIM<br>Activity 18 – 20 |                         |                 |                             |
| 7    | <b>Consolidation of Topic</b>                                     | <b>Topic Summative Assessment</b>   |  | Activity 21  |                         |                 |                             |
| 8    | <b>Topic 2: File Management</b><br>Understand and apply functions | System information and settings are correctly identified and applied.                           | Getting started<br>Turning on the PC   | Practical<br>Computer Classroom,                         |                         |                 |                             |

| Week | Unit                        | Assessment standards                                    | Sections  | Assessment Tasks/Activities                     | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|-----------------------------|---|---|---|-------------------------|-----------------|-----------------------------|
|      |                             |   | <p>Two approaches when talking to Windows</p> <p>Using help</p> <p>To view information about the computer</p> <p>Shutting down the PC correctly</p> <p>Closing applications that are not responding</p> <p>Identifying and applying system information and settings</p> | <p>SIM</p> <p>Activity 1 – 3</p>                |                         |                 |                             |
| 9    | Work with files and folders | The effective use of files and folders are demonstrated | <p>Storing data</p> <p>Understanding files and folders</p> <p>Working with files and folders</p>  | <p>Practical</p> <p>Computer Classroom, SIM</p> |                         |                 |                             |
| 10   |                             |   | <p>Create files and folders</p> <p>Use Windows Explorer</p> <p>Effectively using My</p>   | <p>Practical</p> <p>Computer Classroom, SIM</p> |                         |                 |                             |

| Week | Unit   | Assessment standards  | Sections   | Assessment Tasks/Activities                             | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|--|---|--|---|-------------------------|-----------------|-----------------------------|
|      |  |   | Computer   | Activity 4 - 5  |                         |                 |                             |
| 11   | Manage computer files  | Effective file management is demonstrated.                                      | Managing Data<br>Manage files<br>Find files delete and use the recycle bin | Practical<br>Computer Classroom, SIM                    |                         |                 |                             |
| 12   |  |   | Use floppy disks and flash drives  | Practical<br>Computer Classroom, SIM<br>Activity 6 - 8  |                         |                 |                             |
| 13   | Apply programs and print documents                                 | 'Word' is use effectively and documents are printed correctly                   | Printing data<br>Starting WordPad<br>Printing<br>Printing documents        | Practical<br>Computer Classroom, SIM<br>Activity 9 - 10 |                         |                 |                             |
| 14   | <b>Consolidation of Topic</b>                                      | <b>Topic Summative Assessment</b>   |  | Activity 11   |                         |                 |                             |
| 15   | <b>Topic 3: Word Processing</b><br>Introduction to word processing | Computer terminology is explained and mouse techniques are applied effectively. | The Microsoft Word Window<br>Starting MSWord                               | Practical<br>Computer Classroom, SIM                    |                         |                 |                             |

| Week | Unit        | Assessment standards                        | Sections  | Assessment Tasks/Activities                                    | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|-------------|---|---|--|-------------------------|-----------------|-----------------------------|
|      |             |   | The window layout   |  |                         |                 |                             |
| 16   |             |   | Working in Microsoft Word<br>Setting default options<br>Working with text<br>Working with files<br>Undo and redo<br>Print and print preview<br>Getting help | Practical<br><br>Computer Classroom, SIM<br><br>Activity 1 - 2 |                         |                 |                             |
| 17   | Format text | Text in documents is efficiently formatted. | Designing Documents<br>Formatting Text<br>Formatting paragraphs<br>Hyphenation  | Practical<br><br>Computer Classroom, SIM<br><br>Activity 3     |                         |                 |                             |
| 18   |             |   | Styles<br>Lists<br>Tabs<br>Borders and shading<br>Field, symbols and  | Practical<br><br>Computer Classroom, SIM<br><br>Activity 4 - 5 |                         |                 |                             |

| Week | Unit                            | Assessment standards                                    | Sections  | Assessment Tasks/Activities                             | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|---------------------------------|---|---|---|-------------------------|-----------------|-----------------------------|
|      |                                 |   | characters  |   |                         |                 |                             |
| 19   | Work with extensive text        | Text in extensive documents is efficiently formatted.   | Managing many pages<br>Text management<br>Document management<br>Spelling and grammar | Practical<br>Computer Classroom, SIM<br>Activity 6 - 7  |                         |                 |                             |
| 20   | <b>Consolidation of Topic</b>   | <b>Summative Assessment 1</b>                           |   |   |                         |                 |                             |
| 21   | Format tables                   | The effective use of advanced tables is demonstrated.   | Format Tables<br>Create and edit tables<br>The toolbar                                | Practical<br>Computer Classroom, SIM<br>Activity 8      |                         |                 |                             |
| 22   |                                 |   | Modifying tables  | Practical<br>Computer Classroom, SIM<br>Activity 9 - 10 |                         |                 |                             |
| 23   | Demonstrate the use of graphics | The effective use of advanced graphics is demonstrated. | Graphics<br>Pictures  | Practical<br>Computer                                   |                         |                 |                             |

| Week | Unit                                | Assessment standards                                | Sections   | Assessment Tasks/Activities   | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|-------------------------------------|---|--|---|-------------------------|-----------------|-----------------------------|
|      |                                     |   | The toolbars<br>layout   | Classroom,<br>SIM<br><br>Activity 11 - 13                           |                         |                 |                             |
| 24   | Identify and use software templates | The effective use of templates is demonstrated.     | Templates  | Practical<br><br>Computer Classroom,<br>SIM<br><br>Activity 14 – 15 |                         |                 |                             |
| 25   | File management                     | Efficient file management is demonstrated.          | File management<br><br>Advanced features when saving<br><br>Lost files | Practical<br><br>Computer Classroom,<br>SIM<br><br>Activity 16 – 17 |                         |                 |                             |
| 26   | Importing objects                   | The effective importing of objects is demonstrated. | Objects  | Practical<br><br>Computer Classroom,<br>SIM<br><br>Activity 18 - 19 |                         |                 |                             |
|      | <b>Consolidation of Topic</b>       | <b>Summative Assessment 2</b>                       |  |   |                         |                 |                             |
| 27   | Use 'Mail Merge'                    | The use of advanced mail merge is demonstrated.     | Mail merge wizard  | Practical   |                         |                 |                             |

| Week | Unit  | Assessment standards                                     | Sections   | Assessment Tasks/Activities                               | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|---|--|--|---|-------------------------|-----------------|-----------------------------|
|      |   |  | Data document<br>Main document   | Computer Classroom,<br>SIM<br>Activity 19                 |                         |                 |                             |
| 28   |   |  | Labels<br>Query options<br>The toolbar   | Activity 20   |                         |                 |                             |
| 29   | <b>Consolidation of Topic</b>   | <b>Summative Assessment 3</b>                            |  |   |                         |                 |                             |
| 30   | <b>Topic 4: Information and communication using Outlook</b><br>Introduction to the Internet | The Internet is used effectively and correctly.          | Introduction to the Internet<br>The history of growth<br>Computers communicating<br>The Age of Information<br>An internet presence<br>Presence on the internet | Practical<br>Computer Classroom,<br>SIM<br>Activity 1 – 2 |                         |                 |                             |
| 31   | Introduction to the World Wide Web  | The effective use of the World Wide Web is demonstrated. | Using web browser software   | Practical<br>Computer Classroom,                          |                         |                 |                             |

| Week | Unit                    | Assessment standards  | Sections  | Assessment Tasks/Activities                            | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|-------------------------|---|---|--|-------------------------|-----------------|-----------------------------|
|      |                         |   | The toolbar<br>Getting help   | SIM<br>Activity 3 - 4                                  |                         |                 |                             |
| 32   | Use 'Search Engines'    | The effective use of search engines is demonstrated.            | Searching and finding<br>Search engines<br>Keywords<br>Generic domain names<br>Portals<br>Vortals<br>Hyperlinks | Practical<br>Computer Classroom, SIM<br>Activity 5 - 6 |                         |                 |                             |
| 33   | View and save web pages | The effective viewing and saving of web pages are demonstrated. | Copyright Protection laws<br>Retrieving information   | Practical<br>Computer Classroom, SIM<br>Activity 7 - 8 |                         |                 |                             |
|      | Print documents         | Printing instructions are executed effectively.                 | Print preview and setup<br>Print  | Practical<br>Computer Classroom, SIM                   |                         |                 |                             |

| Week | Unit                      | Assessment standards                              | Sections   | Assessment Tasks/Activities                                      | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|---------------------------|---|--|--|-------------------------|-----------------|-----------------------------|
|      |                           |   |  | Activity 9 -10   |                         |                 |                             |
| 34   | Introduction to 'Outlook' | The opening of 'Outlook' is executed effectively. | Electronic mail<br>Outlook Today<br>The window layout  | Practical<br><br>Computer Classroom, SIM<br><br>Activity 11 -12  |                         |                 |                             |
| 35   | Work with e-mail          | The effective use of e-mails is demonstrated.     | Creating messages<br>Receiving mail<br>Replying to mail<br>Forwarding mail<br>Auto signature<br>Managing attachments<br>Netetiquette | Practical<br><br>Computer Classroom, SIM<br><br>Activity 13 – 14 |                         |                 |                             |
| 36   | Organise e-mails          | E-mails are suitably organised.                   | Sorting the inbox<br>Customising columns<br>Grouping fields<br>Filters   | Practical<br><br>Computer Classroom, SIM<br><br>Activity 15 - 16 |                         |                 |                             |

| Week | Unit                          | Assessment standards                     | Sections                               | Assessment Tasks/Activities                              | Time Allocated (in hrs) | Completion date | Hours in workshop/workplace |
|------|-------------------------------|--|--|--|-------------------------|-----------------|-----------------------------|
|      |                               |  | Find<br>Delete                         |  |                         |                 |                             |
| 37   | Addresses                     | E-mail addresses are suitably organised. | The Address Book<br>Distribution Lists | Practical<br>Computer Classroom, SIM<br>Activity 16 – 17 |                         |                 |                             |
| 38   | <b>Consolidation of Topic</b> | <b>Topic Summative Assessment</b>        |  | Activity 18  |                         |                 |                             |
| 39   | <b>Consolidation Week</b>     |  |  |  |                         |                 |                             |
| 40   | <b>National Examination</b>   |  |  |  |                         |                 |                             |

## Business Practice level 3 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<br><br>Projects |

### 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:

#### 4.2 SPECIFICATIONS FOR THE EXTERNAL ASSESSMENT IN BUSINESS PRACTICE - LEVEL 3

##### 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 3 | KNOWLEDGE AND COMPREHENSION | APPLICATION | ANALYSIS, SYNTHESIS AND EVALUATION |
|---------|-----------------------------|-------------|------------------------------------|
|         | 40%                         | 40%         | 20%                                |

The ff guidelines are offered for the setting of the Business Practice Level 3 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: Employment relations in an organisation 2marks

Question 2: Function in a business environment 20 marks

|              |   |          |
|--------------|---|----------|
| Question 3:  | Resolving conflict in the workplace     | 40 marks |
| Question 4:  | Induction of new staff in the workplace | 20 marks |
| Total marks: | 100 marks                               |          |

### 3. assessment guidelines

#### Topic 1: Employment relations in an organisation

| Subject outcomes  | Assessment standards   | Learning outcomes   | Assessment Tasks/Activities                      |
|---|--|---|--|
| Demonstrate understanding of employment relations in an organisation. | Demonstrate understanding of the various stakeholders and their roles in an organisation.  | <ul style="list-style-type: none"> <li>I can correctly identify different stakeholders.</li> <li>I can correctly explain the roles of identified stakeholders.</li> </ul>   | Assignments, Practical Assignments, Case studies |
|   | Demonstrate understanding of organisational policies and procedures related to employment. | <ul style="list-style-type: none"> <li>I can correctly identify relevant policies and procedures.</li> <li>I can provide a satisfactory explanation of the mechanics of grievance and disciplinary procedures.</li> <li>I can correctly utilise grievance procedures</li> </ul> |  |
|   | Demonstrate understanding of employment related agreements.                                | <ul style="list-style-type: none"> <li>I can correctly identify various types of agreements.</li> <li>I can correctly identify, describe and explain relevant conditions of employment in an organisation.</li> </ul>   |  |

#### Topic 2: Function in a business environment

| Subject outcomes                    | Assessment standards   | Learning outcomes  | Assessment Tasks/Activities           |
|-------------------------------------|--|--|---------------------------------------|
| Function in a business environment. | Describe safety principles for general operation of electrical equipment.                  | <ul style="list-style-type: none"> <li>Describe safety principles for general operation of electrical equipment.</li> </ul>  | Case studies, Tasks<br>SIM, Classroom |
|                                     | Describe various filing systems  | <ul style="list-style-type: none"> <li><i>Range: Index, alphanumeric.</i></li> </ul>   |                                       |
|                                     | Explain the importance of all staff understanding the function and use of office equipment | <ul style="list-style-type: none"> <li>Explain the importance of all staff understanding the function and use of office equipment</li> </ul>                               |                                       |
|                                     | Describe the extent of own responsibility in the office.                                   | <ul style="list-style-type: none"> <li>Describe the extent of own responsibility in the office.</li> </ul>   |                                       |
|                                     | Explain the importance of being sensitive to other people's needs and cultures             | <ul style="list-style-type: none"> <li>Describe issues requiring confidentiality (and explain the importance of maintaining confidentiality around each issue).</li> </ul> |                                       |
|                                     | Decide how one can contribute to the overall effectiveness of the team.                    | <ul style="list-style-type: none"> <li>Notes: - Given a particular team of people, decide how one can contribute to the overall effectiveness of the team.</li> </ul>      |                                       |
|                                     | Decide how work should be prioritised.   | <ul style="list-style-type: none"> <li>Notes: - Given a particular workload, decide how work should be prioritised and give reasons for making the decision.</li> </ul>    |                                       |
|                                     | Operate office equipments effectively  | <ul style="list-style-type: none"> <li>Range: - Fax, photocopier, switchboard.</li> </ul>  |                                       |

|  |   |   |  |
|--|---|---|--|
|  |   |   |  |
|  | Maintain the security surrounding documentation and equipment and give reasons for doing so.  | <ul style="list-style-type: none"> <li>Maintain the security surrounding documentation and equipment and give reasons for doing so.</li> </ul>  |  |
|  | Describe the range of consumables, which may be replenished.  | <ul style="list-style-type: none"> <li>Given a specific piece of office machinery, describe the range of consumables which may be replenished and replenish where necessary.</li> </ul> |  |
|  | File documents using a recognised filing system (and ensure they are easily accessible to all persons needing access, while securing them against unauthorised access). | <ul style="list-style-type: none"> <li>Site examples of situations where it is acceptable to deviate from establishment procedures (and give reasons why).</li> </ul>                   |  |
|  | Analyse and distribute business information, ensuring that individual needs are met.  | <ul style="list-style-type: none"> <li>Range: - Faxes, messages.</li> </ul>   |  |
|  | Make arrangements to repair equipment that is not in good working order.  | <ul style="list-style-type: none"> <li>Make arrangements to repair equipment that is not in good working order.</li> </ul>  |  |
|  | Suggest ways one would learn how the technology operates.   | <ul style="list-style-type: none"> <li>Given new technology in the workplace, suggest ways one would learn how the technology operates.</li> </ul>                                      |  |

Topic 3: Selected business environment

| Subject outcomes   | Assessment standards  | Learning outcomes  | Assessment Tasks/Activities          |
|--|---|--|--------------------------------------|
| Demonstrate an understanding of a selected business environment. | Explain the structure and roles of different types of organisations within their own industry in SA | <ul style="list-style-type: none"> <li>• The various types of organisation are named and explained using the terminology accepted within their own industry.</li> <li>• The roles of the different types of organisation are explained in the context of the business environment.</li> <li>• Business activities common to all organisations within the sector are identified and listed from readily available information.</li> <li>• Two examples of companies in each business sub-sector are identified from advertisements in the media.</li> <li>• Four of the main players in the field are identified and the kind of products or services offered by each are listed and categorised according to purpose.</li> </ul> | Tasks, Case studies<br><br>Classroom |

|  |   |   |  |
|--|---|---|--|
|  | <p>Demonstrate an understanding of the concept of a market as applied to a selected business sector</p>   | <ul style="list-style-type: none"> <li>• The principles of trade that define markets are identified at a basic level of understanding.</li> <li>• The basic principles for the marketing of products are differentiated from the basic principles for the marketing of services.</li> <li>• The role of a selected business sector in the national economy is explained in the context of the business environment.</li> <li>• The value chain describing the way business is conducted in the sector is explained, illustrating with examples.</li> </ul>          |  |
|  | <p>Identify and describe the role of professional bodies associations or regulatory authorities in or affecting) a selected business sector</p> | <ul style="list-style-type: none"> <li>• The reasons for the existence of professional bodies, associations and regulatory authorities within or affecting this sector are explained in the context of the roles that they play.</li> <li>• Three professional bodies, associations or regulatory authorities are identified for each of the sub-sectors.</li> <li>• The benefits of belonging to a selected professional body, association or regulatory authority within the sector are outlined from the perspective of both the organization and the</li> </ul> |  |

|  |   |  |  |
|--|---|--|--|
|  |   | <p>individual</p> <ul style="list-style-type: none"> <li>Information about two of the professional bodies, associations or regulatory authorities is accessed from its website or an industry publication.</li> </ul>  |  |
|  | Discuss the market position of a selected organization in the relevant sub-sector | <ul style="list-style-type: none"> <li>A list of 10 of the products and/or services marketed by a selected organization is tabulated and compared with equivalent products and/or services of competitor organizations.</li> <li>A description of the organisation's current competitive position is given, based on available audited data.</li> <li>The strengths and weaknesses of the organization are compared with those of its two major competitors.</li> <li>The opportunities and threats facing the organization are explained with reference to the external environment.</li> </ul> |  |

Topic 4: Resolving conflict in the workplace

| Subject outcomes | Assessment standards | Learning Outcomes | Assessment Tasks/Activities |
|------------------|----------------------|-------------------|-----------------------------|
|------------------|----------------------|-------------------|-----------------------------|

|   |  |  |  |
|---|--|--|--|
| Use communication skills to handle and resolve conflict in the workplace. | Demonstrate an understanding of different conflict situations in the workplace.  | <ul style="list-style-type: none"> <li>• Different conflict situations that occur in the workplace are listed.</li> <li>• Examples of conflict situations are given and the conflicts described.</li> <li>• Role-players in conflict situations are listed.</li> <li>• Reasons why conflict occurs are listed and discussed.</li> </ul>  | Case studies, roleplay<br>SIM, Classroom |
|   | State and explain the difference between feelings and actual problem (contents), (this would be when dealing with conflict). | <ul style="list-style-type: none"> <li>• Behaviour of different people in a conflict situation is discussed.</li> <li>• Own feelings when in a conflict situation are discussed.</li> <li>• Own behaviour when in a conflict situation is discussed.</li> <li>• The process of reaction in a conflict situation to solving the problem is demonstrated through exercises.</li> </ul> |  |
|   | Handle and resolve conflict in the workplace.  | <ul style="list-style-type: none"> <li>• Methods to resolve conflict are identified and explained.</li> <li>• Conflict situation and possible methods of resolving the conflict are demonstrated by means of a role-play.</li> </ul>   |  |

Topic 5: Induction of new staff in the workplace

| Subject outcomes           | Assessment standards       | Learning outcomes   | Assessment Tasks/Activities       |
|----------------------------|----------------------------|---|-----------------------------------|
| Introduce new staff to the | Demonstrated knowledge and | <ul style="list-style-type: none"> <li>• Explain the importance of</li> </ul> | Practical exercises, Case studies |

|            |   |  |                |
|------------|---|--|----------------|
| workplace. | understanding.  | <p>familiarising new staff with the workplace.</p> <ul style="list-style-type: none"> <li>• Explain the importance of checking that new staff understands their responsibilities.</li> <li>• Explain the difference between introducing a new staff member to the workplace and inducting a new staff member.</li> </ul>   | SIM, Classroom |
|            | Demonstrated ability to make decisions about practice and to act accordingly. | <ul style="list-style-type: none"> <li>• Welcome new staff to the organisation and familiarise them with relevant site facilities and introduce to fellow workers.</li> <li>• Explain basic work routines and organisational procedures in the area of work in sufficient detail to enable understanding of what is required. (Range of Basic work routines: location of facilities, responsibilities, work procedures)</li> <li>• Encourage new staff to ask questions and seek clarification, where necessary assist new staff in the initial performance of allocated work activities.</li> </ul> |                |
|            | Demonstrated ability to learn from our actions and to adapt performance.      | <ul style="list-style-type: none"> <li>• Suggest ways to improve the existing induction programme.</li> </ul>  |                |

Topic 6: Plan and conduct basic research

| Subject outcomes  | Assessment standards  | Learning outcomes   | Assessment Tasks/Activities  |
|---|---|---|------------------------------|
| Plan and conduct basic research in an office environment. | Plan a simple research project  | Plan a simple research project.   | Tasks, Projects<br>Classroom |
|   | Gather and collate data relevant to the research question or problem.                   | <ul style="list-style-type: none"> <li>• Qualitative research methodologies include case studies, interviews, observations, focus groups and content analysis.</li> <li>• Quantitative methodologies may include interviews, structured questionnaires, and historical data collection.</li> </ul>  |                              |
|   | Analyse the data obtained from the research.  | <ul style="list-style-type: none"> <li>• Range: Analysis methods may include ranking, response frequencies, trends, and ranges sorted by demographics, type of information, organisational structure or any other logical and useful division.</li> <li>• More complex statistical and research techniques are excluded from this unit standard.</li> </ul> |                              |
|   | Prepare and present a report and recommendations based on the findings of the research. | <ul style="list-style-type: none"> <li>• Range: In addition to the written report, an oral presentation including slides showing appropriate graphics is expected.</li> </ul>   |                              |
|   | Evaluate the effectiveness and utility of the research.                                 | <ul style="list-style-type: none"> <li>• Range: Evaluation includes the effectiveness of the selected techniques with reference to research purpose.</li> </ul>   |                              |

## Business Practice level 3 – 40 week plan

| Week         | TOPIC<br>Business Practice<br>Level 3                              | SO<br>LO   | SUBJECT & LEARNING OUTCOMES   | HOURS | ASSESSMENT TASKS (PoE)  |
|--------------|--|------------|---|-------|---|
| 1            | Registration/induction   |            |   | 5     |   |
| 2            | Registration/induction   |            |   | 5     |   |
| 3<br>to<br>8 | Employment relations<br>in an organisation<br>(15%)                | <b>SO1</b> | <b>Identify and explain the roles of the various stakeholders in an organisation.</b>         |       | Establish who Stakeholders are. Individual. Stakeholders and their roles. Create an organisation with stakeholders Group.   |
|              |  | LO1.1      | Identify different stakeholders correctly.  | 1     |   |
|              |  | LO1.2      | Explain the roles of identified stakeholders correctly.                                       | 2     |   |
|              |  | <b>SO2</b> | <b>Identify and explain organisation employment policies and procedures.</b>                  |       | Collect, analyse and organise information, in their team, relating to the organisational employment policies and procedures.<br>Collect, analyse and organise information, in their team, relating to the organisations grievance procedure and write report.<br>Apply and evaluate information in a group role-play. |
|              |  | LO2.1      | Identify relevant employment policies and procedures correctly.                               | 4     |   |
|              |  | LO2.2      | Provide a satisfactory explanation of the mechanics of grievance and disciplinary procedures. | 4     |   |
|              |  | LO2.3      | Utilise grievance procedures correctly.   | 4     |   |
|              |  | <b>SO3</b> | <b>Identify and explain employment related agreements.</b>                                    |       | Observation against checklist.  |
| LO3.1        | Correctly identify various types of employment related agreements. | 3          |   |       |   |
| LO3.2        | Explain relevant conditions of employment in an organisation.      | 3          | Class test on theoretical content.  |       |   |

|               |   |       |   |   |   |
|---------------|---|-------|---|---|---|
| 9<br>to<br>17 | Function in a business environment (20%)  | SO1   | <b>Describe safety principles for general operation of electrical equipment.</b><br>Describe and apply safety principles for general operation of electrical equipment.                             | 3 | Essential emergency activities. Group.  |
|               |   | LO1.1 |   |   |   |
|               |   | SO2   | <b>Describe various filing systems.</b><br>File documents correctly (index, alpha numerical)  | 3 | Identify and name the types of files. Individual.                             |
|               |   | LO2.1 |   |   |   |
|               |   | SO3   | <b>Explain the importance of all staff to understand the functions and use of office equipment.</b><br>Explain the importance of all staff to understand the functions and use of office equipment. | 2 | Safety posters. Group.  |
|               |   | LO3.1 |   |   |   |
|               |   | SO4   | <b>Describe the extent of own responsibility in the office.</b><br>Describe the extent of his/her own responsibility in the office.   | 2 | Group workshop exercise on responsibility and personal responsibility. Group. |
|               |   | LO4.1 |   |   |   |
| SO5           | <b>Explain the importance of being sensitive to other peoples cultures and needs.</b><br>Describe issues requiring confidentiality and explain the importance of maintaining confidentiality around each issue. | 3     | Group workshop exercise on culture. Group.  |   |   |
| LO5.1         |   |       |   |   |   |
| SO6           | <b>Decide how one can contribute to the overall effectiveness of the team.</b><br>Work effectively in the team given a particular team of people.   | 3     | Group workshop exercise. Are you a team player ?  |   |   |
| LO6.1         |   |       |   |   |   |
| SO7           | <b>Prioritise work.</b><br>Decide how work should be prioritised and give reasons for making the decision when given  | 3     | Prioritise activities. Groups in pairs.   |   |   |
| LO7.1         |   |       |   |   |   |

|             |  |   |   |
|-------------|--|---|---|
|             | a particular workload.   |   |   |
| <b>SO8</b>  | <b>Operate office equipment effectively.</b>   |   |   |
| LO8.1       | Use the fax machine, photocopier and switchboard effectively.  | 3 | Hazard preventative measures. Individual.                                   |
| <b>SO9</b>  | <b>Maintain security surrounding documentation and equipment and give reasons for doing so.</b>  |   |   |
| LO9.1       | Motivate and maintain security surrounding documentation and equipment.  | 2 | Determining reasons for safety requirements. Individual.                    |
| <b>SO10</b> | <b>Describe the range of office consumables that may be replenished.</b>   |   |   |
| LO10.1      | Describe the range of office consumables which may be replenished and replenish when necessary.  | 4 | Understanding effects of problems relating to office supplies. Individual.  |
| <b>SO11</b> | <b>File documents using a recognised filing system and ensure easy access to all relevant persons, while securing the files against unauthorised access.</b> |   |   |
| LO11.1      | File documents using a recognised filing system.   | 2 | Filing documents. Group.  |
| LO11.2      | Provide access to relevant persons using established procedures.   | 1 | Access to filed documents. Group.   |
| LO11.3      | Secure files against unauthorised access.  | 1 | Filing of documents. Individual.  |
| LO11.4      | Provide examples of situations where it is acceptable to deviate from established procedures and motivate why.   | 2 | Consequences of unacceptable deviations from established procedures. Group. |

|    |                                     |        |   |   |   |
|----|-------------------------------------|--------|---|---|---|
|    |                                     | SO12   | <b>Analyse and distribute business information, ensuring that individual's needs are met.</b><br>Analyse and distribute business information by using faxes and messages.   | 2 | Message format design. Individual.                            |
|    |                                     | LO12.1 |   |   |   |
|    |                                     | SO13   | <b>Make arrangements to repair equipment that is not in good working order.</b><br>Arrange the repair of equipment that is not in good working order.   | 2 | Activity sequences for repairs. Individual.                   |
|    |                                     | LO13.1 |   |   |   |
|    |                                     | SO14   | <b>Suggest ways one could learn how office technology operates.</b><br>Suggest how one could learn to use new office technology entering the workplace.   | 2 | Find providers of technology training. Individual.            |
|    |                                     | LO14.1 |   |   |   |
| 18 | Selected business environment (25%) | SO1    | <b>Explain the structure and roles of different types of organisations within the own industry in South Africa.</b><br>Name and explain the various types of organisations, using terminology accepted within her own industry. | 4 | Roles of different organizations. Individual.                 |
| to |                                     | LO1.1  |   |   |   |
|    |                                     | LO1.2  | Explain the roles of the different types of organisations in the context of the business environment.   | 4 |   |
| 26 |                                     | LO1.3  | Identify business activities, and organisations within the business sector, using readily available information.  | 3 |   |
|    |                                     | LO1.4  | Identify two examples of companies in each business subsector from advertisements in the media.   | 3 | Types of organizations and their activities. Groups of pairs. |

|            |   |   |  |
|------------|---|---|--|
| LO1.5      | Identify four of the main players in the business field. List and categorise their products or services.  | 4 | Identifying the main players. Groups of pairs.   |
| <b>SO2</b> | <b>Explain the concept of the market is applied to a selected business sector.</b>  |   |  |
| LO2.1      | Identify the principles of trade that far markets of the basic level of understanding.  | 2 | Case study. Group.                               |
| LO2.2      | Differentiate the basic principles for marketing <b>products</b> from the basic principles for marketing <b>services</b> .  | 3 | Case study. Group.                               |
| LO2.3      | Explain the role of a selected business sector in the national economy in the context of the business environment.  | 3 | Case study. Group.                               |
| LO2.4      | Explain the value chain in the way business is conducted in the sector and illustrate with examples.  | 4 | Explaining the value chain. Group.               |
| <b>SO3</b> | <b>Identify and describe the role of professional bodies (Association's or regulatory authorities) in or affecting a selected business sector.</b>                          |   |  |
| LO3.1      | Explain the reasons for the existence of professional bodies, associations and regulatory authorities within or affecting the sector in the context of the roles they play. | 3 | Professional bodies in South Africa. Individual. |
| LO3.2      | Identify three professional bodies, associations or regulatory authorities for each of the subsectors.  | 2 | Professional bodies in South Africa. Individual. |

|    |  |            |  |   |   |
|----|--|------------|--|---|---|
|    |  | LO3.3      | Outline the benefits of belonging to a selected professional body, association or regulatory authority within the sector from the perspective of both the organisation and the individual. | 3 | Professional bodies in South Africa. Individual.  |
|    |  | LO3.4      | Access information about to the professional bodies, associations or regulatory authorities from its web site or an industry publication.  | 4 | Professional bodies in South Africa. Individual.  |
|    |  | <b>SO4</b> | <b>Discuss the market position of a selected organisation in the relevant subsector.</b>   |   |   |
|    |  | LO4.1      | Tabulated and compare a list of 10 of the product and/or services marketed by selected organisation with equivalent product and/or services of competitor organisations.                   | 3 | Comparing similar products and services. Individual.  |
|    |  | LO4.2      | Describe the organisation's current competitive position, based on available audited data.   | 3 | Organizations' competitive position and SWOT analysis. Group.                                   |
|    |  | LO4.3      | Compare the strengths and weaknesses of the organisation with those of its two major competitors.  | 4 | Organizations' competitive position and SWOT analysis. Group.                                   |
|    |  | LO4.4      | Explain the opportunities and threats facing the organisation with reference to the external environment.  | 3 | Organizations' competitive position and SWOT analysis. Group.                                   |
| 27 | <b>Resolving conflict in the workplace (15%)</b> | <b>SO1</b> | <b>Understand and explain different conflict situations in the workplace.</b>  |   |   |
| to |  | LO1.1      | List different conflict situations that occur in the workplace.  | 2 | List different situations where you have experienced conflict at school or college. Individual. |

|       |  |            |   |   |  |
|-------|--|------------|---|---|--|
| 31    |  | LO1.2      | Give examples of conflict situations and describe the conflicts.  | 4 | Conflict situation. Group.                                     |
|       |  | LO1.3      | List role players in conflict situations.   | 1 |  |
|       |  | LO1.4      | List and discuss reasons why conflict occurs.   | 3 |  |
|       |  | <b>SO2</b> | <b>Identify and explain the difference between feelings and actual problems (contents) when dealing with conflict.</b>                                      |   |  |
|       |  | LO2.1      | Discuss behaviour of different people in a conflict situation.  | 4 | Behaviour in conflict situations. Group.                       |
|       |  | LO2.2      | Discuss own feelings when in a conflict situation.  | 1 | Behaviour in conflict situations. Group.                       |
|       |  | LO2.3      | Discuss own behaviour when in a conflict situation.   | 1 | How I react in a conflict situation. Individual.               |
|       |  | LO2.4      | Demonstrate reaction in the conflict situation.   | 4 | How I react in a conflict situation. Individual.               |
|       |  | <b>SO3</b> | <b>Handle and resolve conflict in the workplace.</b>  |   |  |
|       |  | LO3.1      | Identify and explain methods to resolve conflict.<br>Demonstrate conflict situation and possible methods of resolving the conflict by means of a role-play. | 2 | Identify and explain methods to resolve conflict. Individual.  |
| LO3.2 |  | 4          | Demonstrate a conflict situation and three different methods of resolving the conflict. Group.  |   |  |
| 32    | <b>Induction of new staff in the workplace (15%)</b> | <b>SO1</b> | <b>Understand and explain why new staff must be orientated in the workplace.</b>  |   |  |
| to    |  | LO1.1      | Explain the importance of familiarising the staff with the workplace.   | 1 | Unfamiliar workplace? Individual.                              |
| 35    |  | LO1.2      | Explain the importance of checking that new staff understand the responsibilities.  | 2 | Check for understanding. Grouped in pairs.                     |
|       |  | LO1.3      | Explain the difference between introducing a new staff member   | 2 | Introduce yourself. Introduce and induct a new learner. Group. |

|    |  |            |  |   |  |
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|    |  |            | to the workplace and impacting on new staff member.  |   |  |
|    |  | <b>SO2</b> | <b>Make decisions about the induction practice and act accordingly.</b>  |   |  |
|    |  | LO2.1      | Welcome new staff to the organisation and familiarise them with the relevant site facilities.  | 3 | Responsibilities. Grouped in pairs.  |
|    |  | LO2.2      | Introduce new staff to fellow workers.   | 1 | Induction documents. Group.  |
|    |  | LO2.3      | Explain basic workgroup teams and organisational procedures in the area of work in sufficient detail to enable the understanding of what is required. (Range of basic work routines: location of facilities, responsibilities, work procedures). | 4 | Mind map. Individual.  |
|    |  | LO2.4      | Encourage new staff to ask questions and seek clarification.   | 1 | Group workshop role-play exercise.   |
|    |  | LO2.5      | Where necessary assist new staff in the initial performance of allocated work activities.  | 3 | Group workshop role-play exercise.   |
|    |  | <b>SO3</b> | <b>Demonstrate the ability to learn from own actions and adapt performance.</b>  |   |  |
|    |  | LO3.1      | Suggest ways to improve the existing induction programme.  | 3 | Your induction programme. What was left out of the induction?Your induction programme. Individual. |
| 36 | <b>Plan and conduct basic research (10%)</b> | <b>SO1</b> | <b>Plan a simple research project.</b>   |   |  |
| to |  | LO1.1      | Plan a simple research project.  | 2 | Methods to be used in research. Groups in pairs. Formulation of research questions.Individual.     |

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| SO2<br><br>LO2.1 | <p><b>Gather and collate data relevant to the research question or problem.</b><br/>Gather and collect qualitative research methodologies that include case studies, interviews, observations, focus groups and content analysis. (Quantitative methodologies may include interviews, structured questionnaires and historical data collection.)</p> | 4 | Research designs used for primary research. Groups of pairs.  |
| SO3<br><br>LO3.1 | <p><b>Analyse the data obtained from the research.</b><br/>Analysis range: Analysis methods may include ranking, response frequencies, trends, and ranges sorted by demographics, type of information, organisational structure or any other logical and useful division. (More complex statistical and research techniques are excluded).</p>       | 4 | Collect, analyse and organise information, in their team, relating to the organisational filing policies and departmental requirements. |
| SO4<br><br>LO4.1 | <p><b>Prepare and present a report and recommendations based on the findings of the research.</b><br/>Prepare and present a report and recommendations based on the findings of the research:<br/>Range: in addition to the written report, an oral presentation including slides showing appropriate graphics is expected.</p>                      | 5 | Write a paragraph on the research question that you prepared in LO 1.1 and evaluate your results. Individual.                           |
| SO5              | <p><b>Evaluate the effectiveness and usefulness of the research.</b></p>   |   |   |

|    |                          |       |   |            |   |
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|    |                          | LO5.1 | Evaluate the effectiveness and utility of the research: Range: Evaluation includes the effectiveness of the selected techniques with reference to research purpose. | 4          | Write a paragraph on the research question that you prepared in LO 1.1 and evaluate your results. Individual. |
| 39 | Examinations/Preparation |       |   | 5          |   |
| 40 | Examinations/Preparation |       |   | 5          |   |
|    |                          |       | Employment relations in an organisation (15%)   | 21         | 12%   |
|    |                          |       | Function in a business environment (20%)  | 40         | 22%   |
|    |                          |       | Selected business environment (25%)   | 55         | 30%   |
|    |                          |       | Resolving conflict in the workplace (15%)   | 26         | 14%   |
|    |                          |       | Induction of new staff in the workplace (15%)   | 20         | 11%   |
|    |                          |       | Plan and conduct basic research (10%)   | 19         | 10%   |
|    |                          |       | Examinations/Preparation  | 20         |   |
|    |                          |       | TOTAL HOURS ESTIMATED   | <u>201</u> | <u>100%</u>   |

