



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

Curriculum and Assessment Policy Statement: Technical Occupational

Year 1 - 4

WHOLESALE AND RETAIL

PUBLIC COMMENT

CONTENT

SECTION 1: INTRODUCTION TO THE CURRICULUM AND ASSESSMENT POLICY STATEMENT: TECHNICAL OCCUPATIONAL

- 1.1 Background
- 1.2 Overview
- 1.3 General aims of the Technical Occupational Curriculum
- 1.4 Subjects and Time allocation

SECTION 2: INTRODUCTION TO WHOLESALE AND RETAIL

- 2.1 What is Wholesale and Retail?
- 2.2 Topics to be studied in Wholesale and Retail
- 2.3 Specific Aims
- 2.4 Requirements for Wholesale and Retail as a subject
 - 2.4.1 Time Allocation
 - 2.4.2 Resources
 - 2.4.3 Infrastructure, equipment and finances
- 2.5 Career opportunities

SECTION 3: OVERVIEW OF TOPICS PER TERM AND ANNUAL TEACHING PLANS

- 3.1 Content overview per Year
- 3.2 Content outline per term (Annual Teaching Plan)

SECTION 4: ASSESSMENT IN WHOLESALE AND RETAIL

- 4.1 Introduction
- 4.2 Assessment Principles
- 4.3 Managing Assessment
- 4.4 Moderation of Assessment
- 4.5 General

SECTION 5: RESOURCES

SECTION 1:

INTRODUCTION TO THE CURRICULUM AND ASSESSMENT POLICY STATEMENT: TECHNICAL OCCUPATIONAL

1.1 Background

The South African Constitution, Act 108 of 1996, enshrines the right of every child to access quality basic education without there being any form of discrimination. There are learners participating in the General Education and Training Band who have an interest and talent in applied knowledge and in technical and vocational skills subjects which are currently not available in the National Curriculum Statement, Grades R to 12 (2011). This cohort of learners should be given an opportunity to achieve a formal qualification or recognition of achievement towards a qualification that is related to any vocational and occupational learning within their area of interest and aptitude.

This Subject Statement has been developed to respond more effectively to the needs of these learners who have been identified and assessed through the protocols approved by the Department of Basic Education and who will benefit from curriculum content that is aligned to the Senior Phase of the National Curriculum Statement at a more applied and functional level in accordance with their interest and aptitude.

It is critical, that through differentiated methodologies, the learners enrolled for this qualification will be able to progress with regard to applied competencies, even where they might not be able to attain the minimum theoretical requirements of the respective grades of the senior phase. There should always be high expectations for all learners and the necessary scaffolding and learning support to master foundational competencies (language and numeracy) relevant to the specific subject, so that they are in a position to demonstrate the practical competencies that they have mastered which will make it possible for them to progress to further education and training pathways.

The learning programme will be structured in such a way that it would adequately prepare learners to progress onto the academic, technical vocational or technical occupational pathways of the Further Education and Training Band, albeit with endorsement. It will also enable learners across the range of competencies and aptitudes to obtain a recognised and accredited qualification or certificate of attainment.

The programme aims at contributing to the ideal of education to produce learners who will function **meaningfully** and **effectively** in the society, be able to enter future **careers** and be equipped to meet the requirements of the **economy** (local and global).

1.2 Overview

Through the policy document the Minister of Basic Education will be able to prescribe the minimum norms and standards for technical occupational education in the General Education and Training band.

The following legal framework will be adhered to:

- (i) National Curriculum Statement, Grades R to 12 (2011) together with the National Protocol for Assessment and the National Policy pertaining to the Programme and Promotion Requirements of the National Curriculum Statement, Grades R to 12;
- (ii) Draft Technical Vocational Subject Statements listed in the Draft General Certificate of Education: Technical Occupational, a Qualification at Level 1 on the National Qualification Framework;
- (iii) General and Further Education and Training Quality Assurance Act, 2001 (Act No.58 of 2001); the General and Further Education and Training Amendment Act, 2008 (Act No 50 of 2008); the NQF Act, 2008 (Act no 67 of 2008) and the Continuing Education and Training Act, 2006 as amended by Act No 3 of 2012 and Act No 1 of 2013;
- (iv) The General and Further Education and Training Qualifications Sub- Framework (August 2013);
- (v) Standards and quality assurance for General and Further Education and Training (June 2008, Revised April 2013);
- (vi) Policy and regulations pertaining to the conduct, administration and management of assessment for the General Education and Training Certificate in Skills and Vocational Training: A qualification at Level 1 on the National Qualification Framework (NQF);
- (vii) Education White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System (2001);

- (viii) The United Nations Convention on the Rights of Persons with Disabilities adopted by the United Nations General Assembly on 13 December 2006 and ratified by the South African parliament on 5 June 2007;
- (ix) The White Paper on the Rights of Persons with Disabilities, 2015;
- (x) Section 11 of the Children's Act (2007);
- (xi) Chapter 5, section 76 of the Children's Act as amended (2007);
- (xii) Umalusi's Quality Assurance of Assessment: Directives, Guidelines and Requirements;
- (xiii) Skills Development Act, 1998 (Act 97 of 1998); and
- (xiv) Assessment Policy for Qualifications and Part Qualifications on the Occupational Qualifications Sub-Framework (OQSF), 2014 of the QCTO.

1.3. General Aims of the Technical Occupational Curriculum

- (a) The National Curriculum Statement, Grades R to 9 gives expression to the knowledge, skills and values worth learning in South African schools. The Technical Occupational Curriculum aims to ensure that learners, irrespective of their abilities, have the opportunity to develop competences for meeting challenges and taking up opportunities in the fast changing 21st century and are also guided to apply knowledge and skills in ways that are meaningful to their own lives. In this regard, the curriculum promotes knowledge in local contexts, while being sensitive to global imperatives, including the demands of the fourth industrial revolution. Sustaining development-relevance in the face of constant and rapid change requires curricula to be lifelong learning systems in their own right, capable of constant self-renewal and innovation.
- (b) The curriculum serves the purposes of:
 - Equipping learners, irrespective of their socio-economic background, race, gender, physical ability or intellectual ability, with the knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country;
 - Promoting critical thinking, creativity and innovation, communication, collaboration, information, media and ICT literacies, flexibility and adaptability, initiative and self-direction, social and cross-cultural, productivity and accountability, leadership and responsibility and life-long learning;
 - Facilitating the transition of learners from education institutions to the workplace;

- Providing employers with a sufficient profile of a learner's competences.
- Being sensitive to issues of diversity such as poverty, inequality, race, gender, language, age, and other factors;
- Valuing indigenous knowledge systems: acknowledging the rich history and heritage of this country as important contributors to nurturing the values contained in the Constitution; and
- Credibility, quality and efficiency: providing an education that is comparable in quality, breadth and depth to those of other countries.

(c) The curriculum is based on the following principles:

- Social transformation: ensuring that the educational imbalances of the past are redressed, and that equal educational opportunities are provided for all sections of the population;
- Active and critical learning: encouraging an active and critical approach to learning, rather than rote and uncritical learning of given truths;
- High knowledge and high skills: the minimum standards of knowledge and skills to be achieved at each grade are specified and set high, achievable standards in all subjects;
- Progression: content and context of each grade shows progression from simple to complex; and
- Human rights, inclusivity, environmental, gender and social justice and equality: infusing the principles and practices of social justice and human rights as defined in the Constitution of the Republic of South Africa as well as the greening of the economy.

(d) Inclusivity should become a central part of the organisation, planning and teaching at each school. This can only happen if all teachers have a sound understanding of how to recognise and address barriers to learning, and how to plan for diversity. The key to managing inclusivity is ensuring that barriers are identified and addressed by all the relevant support structures within the school community, including teachers, District-Based Support Teams, School-based Support Teams, parents and Special Schools as Resource Centres. To address barriers in the classroom, teachers should use various curriculum differentiation strategies such as those included in the Department of Basic Education's Guidelines for Responding to Learner Diversity in the Classroom (2011), as well as the Standard Operating Procedures for Accommodations in Assessment (2016).

1.3.1. The aims of the General Certificate of Education: Technical Occupational

The specific aims of the qualification are to:

- Give recognition to learners who would meet the requirements and achieve the competencies as specified in the Exit Level Outcomes and associated Assessment Criteria as set out in the GFETQSF along differentiated pathways;
- Provide a foundation of quality, standardised general education which will suit the needs of these learners and help prepare them for life after school and enable them to access particular employment or occupational workplace-based learning. It may also enable the learners to access a vocational qualification at a Technical and Vocational Education Training College;
- Promote Lifelong learning to enable learners to continue with further learning and skills development in the workplace;
- Prepare learners to function better in a fully inclusive society and workplace; and
- Provide employers with a profile of the learner's competence.

Learners successfully completing the qualification will be able to:

- Identify, select, understand and apply knowledge to the intended purpose and identify solutions to problems in the field of study;
- Demonstrate the necessary applied knowledge and skills identified for competence in a subject, as specified in the subject statement;
- Demonstrate knowledge and skills gained for purpose of formal communication and basic numerical operations;
- Have the ability to apply knowledge and skills in changing contexts;
- Reflect on their learning in order to promote an interest in learning and further study; and
- Demonstrate basic entrepreneurial skills that will enable them to create their own work and business opportunities in the contexts in which they live.

1.4. Subjects and Time Allocation

Instructional Time for the Technical Occupational Learning Programmes is 27½ hours in a five-day cycle

Subjects		Time	
General Education			
Languages (Home Language and First Additional Language) All 11 official languages (Afrikaans, English, isiNdebele, isiXhosa, isiZulu, Siswati, Sesotho, Setswana, Sepedi, Tshivenda, Xitsonga)		3 Hours for Home Language	
		2 hours for First Additional Language	
Mathematics		3 hours	
Life Skills	Personal and Social Well-being (including aspects of Life Orientation, Social Sciences and Economic and Management Sciences)	2½ hours	6 hours
	Physical Education	1 hour	
	Creative Arts	1 hour	
	Natural Sciences	1½ hours from year 2 onwards This time to be used in year 1 to support Languages and Mathematics	
Information Communication Technology ICT is a compulsory subject for all learners. It can be offered either as a stand-alone or integrated across various subjects. If offered as a stand-alone a school may use time allocated to the Technical Occupational programme. ICT does not count towards the qualification but is a necessary life-long skill. ICT is not to be confused with the Technical Occupational Subject “Office Administration” which is an elective.			

Subjects	Time
Technical Occupational: Electives	
Agricultural Studies Art and Crafts Civil Technology: Bricklaying and Plastering Civil Technology: Plumbing Civil Technology: Woodworking and Timber Consumer Studies: Food Production Consumer Studies: Sewing Early Childhood Development Electrical Technology: Electrical Hospitality Studies Mechanical Technology: Body Works: Panel Beating and or Spray Painting Mechanical Technology: Motor Mechanics Mechanical Technology: Sheet Metal Work Mechanical Technology: Welding Mechanical Technology: Maintenance Office Administration Personal Care: Ancillary Health Care Personal Care: Beauty and Nail Technology Personal Care: Hairdressing Service Technology: Upholstery Wholesale and Retail	13½ hours
Total: General and Occupational	27½

The table below proposes the learner progression across the years at a School of Skills.

Year 1 Minimum of 1 year of orientation	Year 2	Year 3	Year 4
<p>Base Line Assessment for Language and Mathematics</p> <p>➤ Intervention (ISP)</p> <p>General Education:</p> <ul style="list-style-type: none"> • Home Language • FAL • Mathematics • Life Skills: <ul style="list-style-type: none"> ✓ Personal Social Wellbeing ✓ Physical Education ✓ Creative Arts <p>➤ <u>ICT Enrichment</u></p> <p>Technical Occupational</p> <p>Minimum 2 x SKILLS</p> <p>Across the year</p> <p>Post Assessment</p> <ul style="list-style-type: none"> • Analyse results <p>Progress to Year 2 with appropriate support for Languages and Mathematics</p>	<p>General Education:</p> <ul style="list-style-type: none"> • Home Language • FAL • Mathematics • Life Skills: <ul style="list-style-type: none"> ✓ Personal Social Wellbeing ✓ Physical Education ✓ Creative Arts ✓ Natural Sciences <p>➤ <u>ICT Enrichment</u></p> <p>Technical Occupational</p> <p>Minimum of 1 Skill</p>	<p>General Education:</p> <ul style="list-style-type: none"> • Home Language • FAL • Mathematics • Life Skills: <ul style="list-style-type: none"> ✓ Personal Social Wellbeing ✓ Physical Education ✓ Creative Arts ✓ Natural Sciences <p>➤ <u>ICT Enrichment</u></p> <p>Technical Occupational</p> <p>Minimum of 1 Skill</p>	<p>General Education:</p> <ul style="list-style-type: none"> • Home Language • FAL • Mathematics • Life Skills: <ul style="list-style-type: none"> ✓ Personal Social Wellbeing ✓ Physical Education ✓ Creative Arts ✓ Natural Sciences <p>➤ <u>ICT Enrichment</u></p> <p>Technical Occupational</p> <p>Minimum of 1 Skill</p> <p>GCE: TO Qualification</p> <p>Or</p> <p>Certificate of Achievement</p> <p>(External exam- results verified / moderated)</p>

Note:

Year One is an orientation year and learners must be exposed to a minimum of two occupational skills so that they can select a skill with which they will continue from Year Two. Schools that offer more than the minimum two skills in Year One may adapt the Annual Teaching Plan for Year One to accommodate their rotation system to expose learners to more skills e.g. schools may offer a skill per term for Terms 1, 2 and 3 and learners then select the skill they will specialise in and start it in Term 4. It is important that learners in Year One experience the core competencies of the skills so that an informed choice can be made.

Years Two, Three and Four are the critical years for learners. It is important that learners are exposed to all the Topics and Specific Aims per selected Occupational skill, acknowledging that not all learners will be successful in all of these.

SECTION 2:

INTRODUCTION TO: WHOLESALE AND RETAIL

2.1 What is Wholesale and Retail?

The subject lays the foundation for learning in the area of wholesale and retail. The learner will have an understanding of the industry, the need for profit and preventing losses to the business and will be able to prepare and count stock, fill shelves safely and operate a PoS (till) in a manner that promotes customer service and minimises losses.

Learners will also have an understanding of receiving and dispatching products into and from an outlet.

The subject has been designed to equip students with basic knowledge and skills to be able to enter the world of work through employment in the wholesale and retail industry at the entry levels of positions within the operational area of wholesale or retail businesses.

2.2 Topics to be studied in Wholesale and Retail

1. The industry (The supply chain, role players in the industry and jobs and progression within the industry)
2. Profit (The need for profit, how it is arrived at and improving the bottom line of an outlet)
3. Target markets. (Different target markets and how this impacts on service, range and the design of the outlet)
4. Customer service (The importance of customer service and service standards and selling to customers)
5. Stock (The importance of accurate stock counts, receiving and dispatching and ordering)
6. Merchandising (Counting and filling shelves and displaying, pricing and ticketing stock correctly)
7. Recording sales (the recording of sales, accepting payment, and cashing up of PoS)

2.3 Specific Aims:

The learner is able to:

1. explain the role of all role players and stakeholders in the industry
2. analyse an Income Statement and propose ways to improve the bottom line of an outlet
3. identify the requirements of outlets in terms of their service levels and product offering according to their target market
4. evaluate service provided by an outlet and propose improvements to service levels
5. receive stock and prepare documentation for the dispatch of stock and count stock accurately
6. merchandise products on shelves, display prices and ticket displays
7. record sales accept and record payment give change where required and cash up tills and bank takings

2.4 Requirements for Wholesale and Retail as a subject

2.4.1 Time Allocation

The total number of hours allocated for the subject in a five-day cycle is 13½ hours. Sufficient time must be allocated in the school timetable for the practical work required to be done.

2.4.2 Resources

Human resources

Wholesale and Retail requires a trained subject specialist. It is preferred that the teacher offering Wholesale and Retail has attended training in this subject. Industry related experience would be an asset. Teachers must build a relationship with managers of both small and large Wholesale and Retail stores in the area and regularly visit them to keep abreast with the industry

If possible, teachers should ask to shadow workers on the floor and in the cash office to get a better understanding of what happens at this level of operation.

Wholesale and Retail teachers are required to:

- Teach the subject content with confidence and flair

- Interact with learners in a relaxed but firm manner
- Manage the SIM (Simulated shop) store fixtures and fittings and stock
- Manage the budget
- Manage the teaching environment
- Conduct stock taking and inventory
- Plan for practical work
- Plan for theory lessons
- Arrange for learners to visit stores within the area. This might be able to be done through learners doing this on the own if stores are within the area and able to be accessed through public transport otherwise the school should provide transport and arrange outings
- Maintain and prepare the Sim store for all the practical exercises
- Ensure learner safety
- Carry out School Based Assessment (SBA)
- Implement innovative methods to keep the subject interesting
- Be self - motivated to keep her/himself abreast of the latest developments in the industry
- Regularly visit wholesalers and retailers and discuss with management any new innovation within the industry
- Provide students with letters stating they are wholesale and retail students so when they visit stores to observe and talk to management they will be accepted more readily.
- Encourage learners to work in the industry. This could be working in school holidays in wholesale or retail outlets. If learners are not able to find a paying job they should be encouraged to job shadow staff in an unpaid capacity to understand better the theory they learn in the classroom. Teachers should, through their relationship with businesses in the area encourage outlets to take students for work experience.

Learner Resources:

- Text/ resource book

- The internet
- Pen/pencils
- Retailer Game **(If it can be sourced from the Wholesale and Retail SETA)**
- Wholesalers/retailers in the area
- Magazines.
- Newspapers
- Internet pictures
- Calculators

2.4.3 Infrastructure, equipment and finances

Schools must ensure that teachers have the necessary infra-structure, equipment and financial resources for quality teaching and learning.

Infrastructure

- Any school wishing to offer Wholesale and Retail as a subject need to set up a room to look and operate as a retail store. The requirements of this SIM room, as it is referred to in this document, are as follows;
- The school should try partner with retailers in the area and that will help them get second hand equipment, suppliers promotional stands and ticketing and “stock”
- Schools should ask their local retailers to get empty boxes, cans, bags etc of stock from their suppliers for the shop
- A back area separated from the “shop” that can be used as a stockroom must be made available
- There must be sufficient “stock” to fill the shelves. It is advisable that this stock be empty bottles, boxes, cans, bags etc collected by students and staff. Real stock is prone to theft.
- The “stock” should cover a number of different departments/categories such as (examples only)
 - Tea/coffee/sugar containers
 - Pet food containers
 - Cool drink bottles/cans
 - Men’s toiletries
 - Ladies toiletries

- Baby products
 - Health foods/medicinal containers
- Empty bags/bottles can be made more realistic by filling them. Examples are
 - Dog food bags with newspaper
 - Ground coffee bags with soil
 - Cool drink bottles with coloured water
- The SIM room needs to be managed and prepared prior to learners doing their practical exercises such as stock counting, shelf filling tidying etc.
- Electricity supply to the SIM room is crucial, for the operation of the PoS.

Maintaining the Sim room

- The room must be kept locked at all times when not being used.
- Only limited numbers of people should be allowed access to the keys to the sim room.
- Lecturers or someone tasked with being in charge of the room should be the only ones to have access to the sim room key.
- Students should be used to clean, tidy and sweep the room as part of their training and it should not be necessary for cleaning staff to access the room.
- A regular stocktake of equipment is very important as the tills are computers and prone to theft.
- Only Lecturers or the person tasked with being in charge of the sim room should be given access to the code/password of the Admin level that allows for changes to settings on the PoS

Equipment

The following is the minimum requirement for a retail SIM store.

Equipment	Requirements
Point of Sale Equipment (Tills)	Scanning Point of Sale hardware
	Minimum of 2 per SIM room, preferably 3 (this is dependant on the numbers

Linked to a computer Back Office System	of learners)
	The system must allow for a minimum of 4 levels of authority Admin, Supervisor, Office Clerk, Cashier (That can be set under Admin level)
	The system must allow for different tasks to be allocated to these different levels of authority. (That can be set under Admin level)
	The system must allow for each Cashier to cash up – preferably a blind cash up but this is not a must have (This function can be set under Supervisor level)
	Show Cashier's overs & shorts after cashing up. (This can be set under Office Clerk level)
	The system must allow the set-up of a float amount (This can be set under Admin level)
	The system must allow the banking to be completed and banked (This can be set under Office Clerk level)
	<p>The system must allow multiple forms of payment and be programmable to visually show the type of payment methods. It must include;</p> <ul style="list-style-type: none"> ○ Cash ○ Cheque ○ Credit card ○ Debit card ○ Coupons ○ Vouchers
	The above tender types must be designed, printed and available for use when the learners use the PoS
	Plastic discs that can be used as coins at the PoS
	The system must allow new products to be added to the system (This can be set under Supervisor level) both with and without bar-codes
Shelf edge	A shelf edge label printer linked to a system that allows labels to be printed

label printer	from bar code or product code
	Shelf edge label strips on all shelves
Store fixtures and fittings	Supermarket shelving with backboards
	Supplier promotional stands
	Pegboard and pegs
	Clothing rails
Stockroom area	Some shelving which is required to store small and single excess stocks
	Floor space is required to demonstrate building of stacks in the stockroom
	Empty cartons in quantity which should be filled with newspaper and sealed to allow the building of stacks
	Stock
Stock	Preferably empty boxes, bags and cans
	As wide a range of categories as possible
	Carrier bags

Other equipment

- Learners need access to a computer that will allow the design and printing of promotional tickets. (A program such as Word)

Equipment: Consumables

- Printer paper for the printing of promotional tickets
- Shelf edge label paper
- Cash up stationary
- Change requisition slips (These can be requested from many of the banks)
- Cashing up stationary (Designed by the teacher)
- Poster paper/board
- Receiving and dispatch stationary (Designed by the teacher)
- Banking stationary (Designed by the teacher and from banks)

Teacher prepared pre-printed scenarios for exercises

1. Given a list of categories and stock and a layout of a stockroom, learners must position the categories and stock on the racking in line with the principles of stock storage
2. Scenario showing an outlet's actual figures from sales to net profit before interest and budgeted figures for the same entries.
 - Non-controllable expenses should be on budget.
 - Some controllable expenses should show expenditure over budget and others be below budget.
 - Sales should be below budget
 - Shrinkage to be above budget and Gross Profit to be below budget
3. Scenario showing an outlet's income statement with actual figures for Sales, Shrinkage and Cost of Goods sold for "this year" and "last year"
 - Sales should be lower than last year
 - Shrinkage to be higher than last year
 - Cost of Goods sold to be higher than last year and Gross profit to be less than last year
4. Scenario showing an outlet's income statement with actual figures from Sales to Gross Profit for "this year" and "last year"
5. Scenario for scheduling staff giving details of expected sales per hour, average taking per Cashier per hour, tasks to be completed on the shop floor and the length of time each should take and a list of available staff
6. Scenarios for receiving stock giving details of orders, supplier invoice and a list of products coming through the door, and blank discrepancy notes
7. Scenario listing stock to be returned to a supplier and stock to be inter-branched along with blank dispatch notes for the preparation of documents for dispatching of stock
8. Scenario listing a minimum of 10 products each with the following details – stock on hand, outstanding orders, sales, previous delivery received for learners to calculate orders.

Teacher Resources:

- Text book
- Carrier bags/Pictures of logos
- YouTube videos on the Supply Chain
- PowerPoint presentation to be prepared by the teacher
- YouTube Videos on customer service
- YouTube videos of Inventory counting
- Actual products with examples of date coding/sell/use by dates
- Examples of merchandising techniques downloaded off the internet
- Products with prices/product codes
- Examples of pricing/codes off the internet
- Examples of tickets and promotional tickets/posters from retailers in the area
- Businesses in the area
- Pictures of technology used to receive stock taken off the internet.
- Pictures of money counting equipment taken off the internet
- Explanation by SA Police Services regarding the legal procedures for stopping and searching a shoplifter (Policeman visit the class and discuss)
- YouTube video on visual merchandising

Finances:

Budget and inventory

A budget must be allocated for the subject. The amount will be determined by the number of learners taking the subject across all the years and the nature of the practical work required as stipulated in the curriculum. The budget needs to be revised annually and must consider all resources needed per year. The funding must make provision for maintenance of equipment and the replacement over the years.

Resourcing could be sub divided into the following categories:

- ☐ Hardware and Equipment
- ☐ Consumable Materials
- ☐ Practical Assessment Task Resources (PAT)
- ☐ Teaching and Learning Support Material
- Learner excursions (Transport)
- Text books

2.5 Career opportunities

Entry level occupational opportunities for learners with a foundation in Wholesale and Retail include but is not limited to:

- till packer
- shelf filler
- merchandiser
- cashier
- career opportunities for learners employed at the above positions are only limited by the learners' own attitude and application in the workplace. Wholesale and Retail organisations are known for their in-store training and for promoting from within.

SECTION 3:

OVERVIEW OF TOPICS PER TERM AND ANNUAL TEACHING PLANS

3.1 Content Overview

TOPIC	Year 1	Year 2	Year 3	Year 4
1. The Industry Understanding the Wholesale & Retail Industry	Explain the concept and role of wholesaling and Retailing. Identify examples of different categories of retailers and their role in the economy Draw a poster illustrating the supply chain and showing the flow of stock, cash and information through the supply chain Draw a poster that displays pictures or logos of businesses that fall into each subsector and category of the industry	Identify the roles of Wholesaling and Retailing Match examples of retailers to their sub sector List the different categories of retailers in the industry and explain how this impacts on their level of computerisation Draw a poster showing the flow of stock and another showing the flow of cash through a store Identify what internal and external support functions	Draw the supply chain and explain the role of each of the role players in the chain Explain why chain stores have Distribution Centres by explaining how they impact on stock levels and the finances of a business Draw a section of racking in a Distribution Centre and show where pick and reserve stock would be stored	Provide the full title of applicable legislation and an overview of the aims and objectives of each Schedule staff

TOPIC	Year 1	Year 2	Year 3	Year 4
	Identify stores in the area that have the different levels of computerisation	<p>stores of different size use</p> <p>Identify stakeholders of a wholesale or retail outlet</p> <p>Identify the levels of jobs in a large chain store</p> <p>Draw a poster showing progression within the operations of a chain store</p>		
<p>2. Profit</p> <p>Plan to improve the profit of a wholesale or retail business</p>	<p>Explain what profit is and why it is important</p> <p>Explain how shrinkage affects the profits of a business</p> <p>Identify stores that fall into the different concepts of profit and volume</p> <p>Identify departments within a supermarket that fall into the</p>	<p>Identify how 2 local supermarkets handle the space of items that are sold out why they do it that way.</p> <p>Explain what shrinkage is and what the major causes of shrinkage are in the industry</p>	<p>Describes what you must do to each entry on an Income Statement if you want to improve the net profit of an outlet</p> <p>Compare actual figures to budgeted figures for an outlet and identify areas requiring improvement</p> <p>Explain the importance of product mix to an outlet.</p>	<p>Analyse an Income Statement and propose methods to improve the bottom line of an outlet</p> <p>Identify ways in which various retailers are trying to minimise shoplifting</p> <p>Explain what to do in the event of witnessing a shoplifting event.</p>

TOPIC	Year 1	Year 2	Year 3	Year 4
	different concepts of profit and volume		<p>Identify high and low margin products in different retail stores</p> <p>Design a poster showing how the industry tries to prevent internal theft</p> <p>Analyse an Income Statement and identify entries needing improvement in order to improve Gross Profit</p>	<p>Analyse an Income Statement and identify entries needing improvement in order to improve the bottom line of an outlet</p>

TOPIC	Year 1	Year 2	Year 3	Year 4
3. Target Markets Identify different target markets and how they impact on retail businesses	Identify the target market for 5 different stores within the area. Identify stores aimed at the different customer profiles within the area. Explain how customer profiles affect a business's product range	Identify LSM target markets for stores in the local area		Design a poster showing in-store and external promotional material used by wholesalers or retailers targeting different target markets

TOPIC	Year 1	Year 2	Year 3	Year 4
4. Customer Service Identify standards of service expected of the industry	Identify examples of the different levels of service provided by retailers in the area. Identify examples of good and bad service. Explain customer shopping patterns and how this impacts on service requirements	Identify Moments of Truth in a retail outlet	Design a checklist to evaluate service in the field Evaluate service in a small store and a large chain store Handle customer queries and complaints Match selling concepts to products	Explain how to promote safety in the workplace: Identify which wholesalers and retailers offer additional services Demonstrate selling products
5. Stock Explain the importance of stock control and count, receive and dispatch stock	Explain whether you would implement perpetual inventory if you owned a wholesale or retail business and why, or why not.	Identify how stores of different sizes count stock Evaluate how successful a local supermarket is at stock rotation Sort, tidy and count stock	Position categories and stock on storeroom racking Explain how stock should be received in an outlet so as to minimise shrinkage Explain when wholesale and retail businesses will dispatch stock and how inaccurate	Receive deliveries and complete paperwork Complete paperwork for the dispatch of stock Calculate orders

TOPIC	Year 1	Year 2	Year 3	Year 4
			<p>dispatching affects shrinkage</p> <p>Identify the different ordering methods applicably to different types of stores</p>	
<p>6. Merchandising</p> <p>Explain how different categories are merchandised and merchandise stock</p>		<p>Explain why merchandising is important in the retail industry</p> <p>Identify different fixtures and fittings for merchandising different categories of stock</p> <p>Identify examples of 10 merchandising methods</p> <p>Identify different pricing methods</p> <p>Identify the latest computerised methods for displaying prices</p> <p>Identify ticketing in different stores</p>	<p>Explain the importance of merchandising and principles of merchandising for different target markets</p> <p>Match fixtures and fittings to target market and products displayed</p> <p>Match pricing and ticketing to target markets and product offering</p> <p>Identify how to handle the different categories of stock when merchandising</p> <p>Identify how to merchandise</p>	<p>Discuss the advantages and disadvantages of set layouts and planograms</p> <p>Report on the role of an external merchandiser and how he/she works</p> <p>Identify method and examples of visual merchandising in different retailers</p>

TOPIC	Year 1	Year 2	Year 3	Year 4
			<p>so as to prevent losses</p> <p>Explain how to change a layout in an outlet</p> <p>Fill shelves, merchandise stock and change a layout</p>	
<p>7. Record sales</p> <p>Record sales, process payment, cash up tills and bank takings</p>		<p>Identify PoS equipment and parts</p> <p>Scan products and total sales.</p> <p>Accept the different forms of payment</p> <p>Record and total sales and process payment and give change accurately in a manner that minimises losses and enhances customer service</p> <p>Sort payments received in the till</p>	<p>Use a till in a manner that minimises losses and promotes customer service:</p> <p>Prepare the different types of tender and complete the documentation to have their till cashed up</p> <p>Order change and complete change requisition slips</p>	<p>Record sales and process payment</p> <p>Record and process an uplift</p> <p>Cash up multiple tills and balance cash up</p> <p>Prepare and complete documentation for banking</p> <p>List the documentation to be completed when depositing through cash collection guards</p>

3.2 CONTENT OUTLINE PER TERM

Year 1

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	The Industry: Concepts, categories and roles	<ul style="list-style-type: none"> • Explain the concept and role of Wholesaling and Retailing: <ul style="list-style-type: none"> ○ The wholesale and retail industry ○ Retailing ○ Wholesaling ○ Distribution • Identify examples of different categories of retailers and their role in the economy: <ul style="list-style-type: none"> ○ Groups/chains ○ Independents ○ Small and medium enterprises ○ Franchise ○ Discounters ○ Convenience stores 	<p>Theoretical explanation as well as field work.</p> <p>Text book</p> <p>All field exercises require learners to visit stores/shopping area either on their own or through the school transporting them</p> <p>Field Exercise</p> <p>Learners to identify examples in local area of each type of retailer</p> <p>Learners to visit a supermarket and note the different departments</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Minimum of one lesson at the end of this week or the start of week 2 to be devoted to the presentations</p> <p>Learners to access the internet and identify wholesalers in</p>

			South Africa
2	The Industry: The supply chains	<ul style="list-style-type: none"> Draw a poster illustrating the supply chain and showing the flow of stock, cash and information through the supply chain. <p>Explanation of:</p> <ul style="list-style-type: none"> The supply chain Role players in the supply chain The role of each role player in the supply chain The cold chain Flow of stock, cash and information through the supply chain The importance of accurate and timely information 	Theoretical explanation as well as practical exercise Text book YouTube videos on the Supply Chain For an example of the supply chain drawing refer to Annexure 1 PAT (Practical assessment task or Project) should start in week two. The learner to design a poster illustrating the supply chain and show the flow of stock, cash and information through the supply chain
3	The Industry: Sub sectors of retailers	<ul style="list-style-type: none"> Draw a poster that displays pictures or logos of businesses that fall into each sub sector and category of the industry. <ul style="list-style-type: none"> Formal & Informal Furniture CFTA Food 	Theoretical explanation as well as field work Text book Carrier bags/Pictures of logos Learners to draw a poster that displays pictures or logos of businesses that fall into each sub sector and category of the industry

		<ul style="list-style-type: none"> ○ Speciality ○ Fuel ○ Multi sector chain ○ Introduce the concept and terms Categories/commodities/departments <ul style="list-style-type: none"> • Identify stores within the area that have the different levels of computerisation <p>Explanation of:</p> <ul style="list-style-type: none"> ○ The role of computerization in the industry ○ Degrees of computerization in the industry ○ The different degrees of computerization between small businesses and national chains 	<p>Field work</p> <p>Learners to identify stores within the area that could have the different levels of computerisation</p> <p>Minimum of one lesson at the end of this week or the start of week 4 to be devoted to the presentations</p>
4	<p>Profit:</p> <p>Concept and importance.</p> <p>Introduction to shrinkage</p>	<ul style="list-style-type: none"> • Explain what profit is and why it is important • Explain how shrinkage affects the profits of a business <ul style="list-style-type: none"> ○ The importance of profit ○ The term Top line ○ The term Bottom line ○ Introduction to Income statement 	<p>Theoretical explanation</p> <p>Text book</p> <p>PowerPoint presentation</p> <p>Retailer Game (If it can be sourced form the Wholesale and Retail SETA)</p> <p>Learner to explain what profit is and why it is important for</p>

		<ul style="list-style-type: none"> ○ Explanation of all terms in the income statement ○ Explanation of shrinkage <ul style="list-style-type: none"> ▪ The concept shrinkage ▪ The problem of shrinkage in the industry 	business
5	Profit: Profit versus volume	<ul style="list-style-type: none"> • Identify stores area that fall into the different concepts of profit and volume • Identify departments within a supermarket that fall into the different concepts of profits and volume <ul style="list-style-type: none"> ○ The concept of Volume versus Gross Profit ○ Volume versus Gross Profit in a boutique ○ Volume versus Gross Profit in a discount retailer ○ Volume versus Gross Profit in different departments of a supermarket ○ Volume versus Gross Profit in in-store production 	Theoretical explanation as well as field work Text book PowerPoint presentation Field work Learner to identify applicable stores in the area that fall into the different concepts of profit versus volume Learner to identify departments within a supermarket that fall into the different concepts of profit versus volume Minimum of one lesson at the end of this week or the start of week 6 to be devoted to the presentations
6	Target Market: Introduction Customer profiles	<ul style="list-style-type: none"> • Identify the target market for 5 different stores within the area <ul style="list-style-type: none"> ○ Different target markets such as <ul style="list-style-type: none"> • Income • Product 	Theoretical explanation as well as field work Text book PowerPoint presentation

		<ul style="list-style-type: none"> Identify stores aimed at the different customer profiles within the area Explain how customer profiles affect a business's product range <ul style="list-style-type: none"> Age Gender Geographical factors Ethnicity & beliefs Income LSM groups An explanation of how this affects a businesses product range 	<p>Field work</p> <p>Learners to identify the target market for 5 different stores within the area</p> <p>Field work</p> <p>Learners to identify stores aimed at the different profiles within the area</p> <p>Minimum of one lesson at the end of this week or the start of week 7 to be devoted to the presentations</p>
7	<p>Customer Service:</p> <p>Levels of service</p>	<ul style="list-style-type: none"> Identify examples of the different levels of service providing by retailers in the area <ul style="list-style-type: none"> The importance of customer service Full service Partial service 	<p>Theoretical explanation, discussion as well as field work</p> <p>Text book</p> <p>YouTube Videos on customer service</p> <p>Class discussion on personal experience of service</p>

		<ul style="list-style-type: none"> ○ Self service ○ Internet shopping and service • Identify examples of good and bad service <ul style="list-style-type: none"> ○ How a smile and greeting impact on customer feelings towards a store ○ How a smile and greeting reduce theft • Explain customer shopping patterns and how this impacts on service requirements <ul style="list-style-type: none"> ○ Malls ○ Convenience stores ○ Town centre 	<p>Field work</p> <p>Learners to visit stores within the area and identify examples of different stores providing the different level of service</p> <p>Minimum of one lesson at the end of this week or the start of week 8 to be devoted to the presentations</p> <p>Access Hellopeter on the internet and identify good and bad examples of service</p> <p>Learners to explain the different shopping patterns</p>
8	<p>Stock:</p> <p>Perpetual inventory</p>	<ul style="list-style-type: none"> • Explain whether you would implement perpetual inventory if you owned a wholesale or retail business and why or why not. <ul style="list-style-type: none"> ○ The concept of perpetual inventory ○ Benefits to perpetual inventory ○ The impact on stock levels on <ul style="list-style-type: none"> • Overstocks and cash flow • Sold outs and sales and customer 	<p>Theoretical explanation</p> <p>Small group exercise</p> <p>Learners to decide if they owned a wholesale or retail business would they implement perpetual inventory and explain why they would or would not.</p>

		satisfaction	
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	

Activity 1 – PRACTICAL ASSESSMENT TASK - PAT (Practical project) = 35% of term mark

Learners must produce a poster showing the supply chain and the flow of stock cash and information

- The supply chain (80 % of total marks of demonstration)
- The flow of stock, cash and information. (20 % of total marks of project)

Total for Activity 1 Marks to be converted to 35% of total term mark

Activity 2 – PRACTICAL ASSESSMENT TASK - PAT (Practical project) = 40% of term mark

Learners must produce a poster showing the logos of South African retailers that target their market as follows

- By product
- By Gender
 - Males
 - Females
- Higher income shoppers
- Lower income shoppers

They must also identify which of the following category and sub sector the retailer falls in

- A nation retail food chain
- A national retail clothing chain
- A furniture store (Chain or independent).
- A speciality store (Chain or independent)
- A wholesaler
- A convenience store
- A discount store

Logos can be drawn or cut form shopping bags or sourced from the internet.

And they must identify whether each retailer is full, partial or self service

- Identification of target market (35 % of total marks of project)
- Identification of category (25 % of total marks of project)
- Identification of sub sector (25 % of total marks of project)
- Identification of service level. (15% of total marks of project)

Total for Activity 2 Marks to be converted to 40% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done during the term.

Year 2 Term 1

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	The Industry: Roles and Sub Sectors	<ul style="list-style-type: none"> Identify the roles of Wholesaling and Retailing <ul style="list-style-type: none"> The wholesale and retail industry Retailing Wholesaling Distribution Match examples of retailers to their sub sector <ul style="list-style-type: none"> Formal & Informal Furniture CFTA Food Speciality Fuel Multi sector chain 	<p>This is a recap on the explanation covered in year 1</p> <p>Text Book</p> <p>Discussion</p> <p>Learners to identify the roles of wholesalers and Retailers in the industry either verbally or in writing.</p> <p>Given a list of various South African retailers from the different sub sectors learners are to match the retailers to the correct sub sector</p>
2	The Industry:	<ul style="list-style-type: none"> List the different categories of retailers in the industry and explain how this impacts on their level of computerisation: 	<p>This is a recap on the explanation covered in year 1</p>

	Categories and Roles	<ul style="list-style-type: none"> ○ Groups/chains ○ Independents ○ Small and medium enterprises ○ Franchise ○ Discounters ○ Convenience stores ○ The role of computerization in the industry ○ Degrees of computerization in the industry ○ The different degrees of computerization between small businesses and national chains 	<p>It is important as it impacts on virtually all processes in the industry</p> <p>Theoretical explanation</p> <p>Text book</p> <p>Oral discussions in pairs</p> <p>Learners to list the different categories of retailers in the industry and explain how this impacts on their level of computerisation:</p>
3	<p>The Industry:</p> <p>The flow of stock and cash through an outlet</p>	<ul style="list-style-type: none"> • Draw a poster showing the flow of stock and another showing the flow of cash through a store <ul style="list-style-type: none"> ○ The flow of stock through a wholesale or retail outlet ○ The role of each role player in this flow <ul style="list-style-type: none"> ▪ Receiving & dispatching ▪ Stockroom assistant ▪ Shelf filler merchandiser ▪ Sales assistant 	<p>Text book</p> <p>PowerPoint presentation</p> <p>PAT (Practical assessment task or Project) should start in week three.</p> <p>For an example of a diagram of the flow of stock refer to annexure 2</p> <p>For an example of a diagram of the flow of cash refer to annexure 3</p>

		<ul style="list-style-type: none"> ○ The flow of cash through a wholesale or retail outlet ○ The role of each role player in this flow <ul style="list-style-type: none"> ▪ Cashier ▪ Cash office ▪ Cash collection guards ○ Other operational functions in a wholesale and retail outlet <ul style="list-style-type: none"> ▪ Till packers ▪ Credit controllers ▪ Admin office ▪ Management 	Learners to draw a poster showing the flow of stock and cash through a store
4	<p>The Industry:</p> <p>Support function required by an outlet</p>	<ul style="list-style-type: none"> • Identify what internal and external support functions stores of differing size use: <ul style="list-style-type: none"> ○ The concept of internal and external support functions ○ How small, medium and national chains differ in terms of internal and external support functions ○ Support functions include but are not limited to 	<p>Text book</p> <p>PowerPoint presentation</p> <p>All field exercises require learners to visit stores/shopping area either on their own or through the school transporting them</p> <p>After field work learners to make a presentation to the class on their finding.</p>

		<p>the following</p> <ul style="list-style-type: none"> ▪ Buying ▪ Planning ▪ Logistics ▪ Marketing/Advertising ▪ Maintenance ▪ Finance & Accounts ▪ IT ▪ Human Resources ▪ Payroll ▪ Consultants ▪ Service providers such as plumbers, electricians 	<p>Field work</p> <p>Visit 4 stores of differing size, interview managers/owners and identify what internal and external support functions they use</p> <p>Minimum of one lesson at the end of this week or the start of week 5 to be devoted to the presentations</p>
5	<p>The Industry:</p> <p>Stakeholders</p>	<ul style="list-style-type: none"> • Identify stakeholders of a wholesale or retail outlet: <ul style="list-style-type: none"> ○ Stakeholders include the following <ul style="list-style-type: none"> ▪ Owner/shareholders ▪ Staff ▪ Suppliers 	<p>Text book</p> <p>Learners to use the internet, magazine etc to identify examples of different stakeholders.</p> <p>Learners to make presentation to the class.</p> <p>Minimum of one lesson at the end of this week or the start of week 6 to be devoted to the presentations</p>

		<ul style="list-style-type: none"> ▪ Outside service companies ▪ The government ▪ Customers ▪ Banks ▪ Welfare organisations ▪ The community ▪ Unions ▪ The Wholesale and Retail SETA ▪ Competitors <ul style="list-style-type: none"> ○ The role of each stakeholder 	
6	The Industry: Career paths in the industry	<ul style="list-style-type: none"> • Identify the levels of jobs in a large chain store <ul style="list-style-type: none"> ○ Starting level - packer, cashier, stockroom assistant, shelf filler ○ Moving up to Sales assistant, receiving & dispatch clerk, cash office clerk, service counter assistant, ○ Moving up to Supervisor ○ Moving up to Manager ○ Moving up to Area and General manager • Draw a poster showing progression within the operations of 	Text book After field work learners to make a presentation to the class on their finding. Field work Interview the manager of a large chain store and identify the levels of jobs in their store Minimum of one lesson at the end of this week or the start of week 7 to be devoted to the presentations Learners to draw a poster showing progression within the

		a chain store	operations of a chain store For an example of a poster of progression refer to annexure 4
7 - 8	Profit: Handling sold outs	<ul style="list-style-type: none"> Identify how 2 local supermarkets handle the space of items that are sold out and why they do it this way <ul style="list-style-type: none"> Start with a refresher on the entries of an Income Statement Recap on the need for profit Recap on how shrinkage affects profits How each entry impact of gross and net profit How sold outs affect sales How lost sales affect Gross Profit How this impacts on Net profit How “Supplier out of stock” ticketing can reduce lost sales The debate on leaving space open or filling space of sold outs 	<p>Text book</p> <p>PowerPoint presentation</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Visit 2 self service stores and ask whether they fill or leave open spaces of sold out items and why they do it the way they do.</p> <p>Minimum of one lesson towards the end of week 8 to be devoted to the presentations</p>

9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.
<p>Activity 1 – PRACTICAL ASSESSMENT TASK - PAT (Practical project) = 75% of term mark</p> <p>Learners must produce a poster showing the various jobs within a chain store and depicting the various levels and progression within the industry</p> <ul style="list-style-type: none"> • The various jobs (50 % of total marks of project) • Levels and progression (<u>50% of total marks of project</u>) <p>Total for Activity 1 Marks to be converted to 75% of total term mark</p> <p>Activity 2</p> <p>Formal written or oral assessment – 25%</p> <p>Scope of work is all the work done during the term.</p>		

Year 2 Term 2

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Profit: Shrinkage	<ul style="list-style-type: none"> Explain what shrinkage is and what the major causes of shrinkage are in the industry <ul style="list-style-type: none"> Recap on what shrinkage is and how it affects the business Causes of shrinkage <ul style="list-style-type: none"> Internal theft External theft Errors Waste & damages Fraud Breaches in security 	<p>Text book</p> <p>Learners to explain the concept of shrinkage and what causes shrinkage in the industry using practical examples</p>
2 & 3	Target Market: The impact on a business	<ul style="list-style-type: none"> Identify LSM target markets for stores in the local area. <ul style="list-style-type: none"> Recap on target market. The impact of target market on store design. The impact of target market on product range 	<p>Text book</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit store within the area and identify LSM</p>

		<ul style="list-style-type: none"> ○ The impact of target market on layout ○ The impact of target market on merchandising and ticketing ○ The impact of target market on advertising ○ LSM groups 	<p>target market based on discussed factors</p> <p>Minimum of one lesson at the end of this week or the start of week 4 to be devoted to the presentations</p>
4	<p>Customer Service:</p> <p>Moments of truth</p>	<ul style="list-style-type: none"> ● Identify Moments of Truth in a retail outlet: <ul style="list-style-type: none"> ○ Recap on service levels for the different target markets ○ The concept “Moments of Truth ○ Example of moments of magic ○ Examples of moments of misery 	<p>Text book</p> <p>Discussion on personal experiences</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit a retail supermarket and put together a list of when a moment of truth occurs,</p> <p>This should be a very long and inclusive list.</p> <p>Have a competition to see who comes up with the longest list of accurate moments of truth</p> <p>Minimum of one lesson at the end of the week or the start of week 5 to be devoted to the presentations</p>

5	Stock: Methods of counting	<ul style="list-style-type: none"> Identify how stores of different sizes count stock <ul style="list-style-type: none"> Why outlets count stock <ul style="list-style-type: none"> Ordering Financial stock counts Non-computerised methods of counting Computerised methods for counting 	<p>Text book</p> <p>YouTube videos of Inventory counting</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit 4 stores of differing size, interview managers/owners and identify how they count stock</p> <p>Minimum of one lesson at the end of this week or the start of week 6 to be devoted to the presentations</p>
7	Stock: Stock control	<ul style="list-style-type: none"> Evaluate how successful a local supermarket is at stock rotation <ul style="list-style-type: none"> Recap on Importance of stock management Recap on Impact of stock on customers Recap on Impact of stock on finance Impact of stock on shrinkage & breakages Shop floor tasks impacting on stock levels Importance of stock rotation The effect of not managing stocks correctly Date coding 	<p>Text book</p> <p>Actual products with examples of date coding/sell/use by dates</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit a retailer and look at date coding on products and evaluate how successful the business is at stock rotation</p> <p>Learners must list any products they find on or past their sell by date</p>

		<ul style="list-style-type: none"> ○ Sell/use by ○ Dating on receipt <ul style="list-style-type: none"> • Stock rotation • Security ○ How stock rotation is implemented 	Minimum of one lesson at the start of week 7 to be devoted to the presentations
7 & 8	Stock: Sorting and counting stock	<ul style="list-style-type: none"> • Sort, tidy and count stock <ul style="list-style-type: none"> ○ The impact of housekeeping on the accuracy of counts ○ Sorting and tidying stock in the stockroom ○ Sorting and tidying stock on the shop floor ○ Counting stock in the SIM room 	Text book Demonstration in the SIM room Actual stock in the stockroom and shop floor of the SIM room Learners to demonstrate their ability to correctly sort, tidy and count stock in the SIM room The teacher is to prepare for these sessions by untidying stock in the SIM stockroom and shop floor This is fundamental to learners getting a position in a wholesale or retail outlet and learners need to have the confidence to do this accurately. For an example of a stock count sheet teachers need to prepare refer to annexure 5 For an example of a checklist to use when evaluating learner performance in sorting, tidying and counting refer to annexure 6

9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.
<p>Activity 1 – PAT (Practical demonstration) Demonstration = 75% of term mark</p> <p>Learners to demonstrate sorting, tidying and counting stock in the SIM room</p> <ul style="list-style-type: none"> • Sorting and tidying (50 % of total marks of demonstration) • Counting (50% of total marks of demonstration) <p>Total for Activity 1 Marks to be converted to 75% of total term mark</p> <p>Activity 2</p> <p>Formal written or oral assessment – 25%</p> <p>Scope of work is all the work done during term 1 and term 2.</p>		

Year 2 Term 3

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Merchandising: The concept and importance	<ul style="list-style-type: none"> Explain why merchandising is important in the retail industry <ul style="list-style-type: none"> Concept & Objective of merchandising The influence of displays on sales The difference in merchandising techniques in wholesalers & retailers Merchandising techniques in different sub sectors 	<p>Text book</p> <p>PowerPoint presentation with pictures</p> <p>Learners to explain the importance of merchandising to improve sales in an outlet</p>
2 & 3	Merchandising: Fixtures & Fittings	<ul style="list-style-type: none"> Identify different fixtures and fittings for merchandising different categories of stock. <ul style="list-style-type: none"> Gondolas in self service stores Promotional fixtures in self service stores Fridges, freezers hot food cabinets Bins. Clothing rails and shelving Jewellery display fixtures 	<p>Text book</p> <p>PowerPoint presentation This is a very visual topic and examples of merchandising techniques can be downloaded from the internet to show.</p> <p>PAT (Practical assessment task or Project) should start in week three.</p> <p>After field work learners to make a presentation to the class on their finding.</p>

		<ul style="list-style-type: none"> ○ Display cabinets ○ Pegboard ○ Mannequins ○ Tables ○ Angled shelving ○ Specific fixtures e.g. for brooms, crockery etc 	<p>Field work</p> <p>Learners to visit stores in the area and identify and take photographs of different fixtures and fittings for merchandising different types of stock or access the internet for examples of different fixtures and fittings</p> <p>Minimum of one lesson at the end of week 3 to be devoted to the presentations</p>
4 & 5	<p>Merchandising;</p> <p>Merchandising methods</p>	<ul style="list-style-type: none"> • Identify examples of 10 merchandising methods: <ul style="list-style-type: none"> ○ Cross merchandising. ○ Merchandising high value items ○ Merchandising Down, Across and Across & down ○ Double packing, ○ Stack them high, ○ One on display (electrical) ○ Planned purchases, Impulse buys, ○ Eye level is buy level. ○ Hot spots, 	<p>Text book</p> <p>PowerPoint presentation This is a very visual topic and examples of merchandising techniques can be downloaded from the internet to show</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit stores in the area and identify examples of 10 display methods and take photographs of them to show the class during their feedback session</p> <p>Minimum of one lesson at the end of week 5 to be devoted to the presentations</p>

		<ul style="list-style-type: none"> ○ Merchandising by price and by size ○ Supplier cartons and stands ○ Shoe display stands ○ Room to go concept in furniture ○ Music racks 	
6 & 7	Merchandising: Pricing	<ul style="list-style-type: none"> • Identify different pricing methods. • Identify the latest computerised methods for displaying prices <ul style="list-style-type: none"> ○ The need for customers to know what they are going to pay ○ Bar codes ○ Internal product code ○ Shelf edge labels ○ Electronic shelf edge labels and price display units ○ Pricing pegboard items ○ Kimble tags ○ Self adhesive labels 	Text book Actual products with examples of prices/codes PowerPoint presentation This is a very visual topic and examples of pricing and pricing methods can be downloaded from the internet to show After field work learners to make a presentation to the class on their finding. Field work Identify as many different pricing methods by visiting stores and accessing the internet Minimum of one lesson at the end of week 7 to be devoted to the presentations

		<ul style="list-style-type: none"> ○ Pin tickets ○ Display tickets ○ Shelf talkers ○ Jewellery ○ Manual pricing ○ Tools used to price mark ○ Where you put the ticket is important ○ Pricing for target market 	Learners to access the internet and identify the latest computerised methods for price marking internationally
8	Merchandising: Ticketing	<ul style="list-style-type: none"> • Identify ticketing in different stores <ul style="list-style-type: none"> ○ Different forms of ticketing used in the industry <ul style="list-style-type: none"> • Reduced to clear ticketing • Silent salesman tickets • Supplier out of stock tickets • <i>NEW</i> tickets ○ Different forms of promotional ticketing <ul style="list-style-type: none"> • General <i>SALE</i> tickets • Posters and hanging posters • Window tickets and posters 	Text book Examples of tickets from retailers PowerPoint presentation This is a very visual topic and examples of tickets and ticketing can be downloaded from the internet to show After field work learners to make a presentation to the class on their finding. Field work Learners to identify examples of ticketing in different stores and take photos Minimum of one lesson at the end of week 8 to be devoted

		<ul style="list-style-type: none">• Shelf edge tickets• Shelf talkers• Wobblers• Banners• Wash lines/bunting• Screamer boards○ Ticketing for different target markets	to the presentations
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
<p>Activity 1 – PAT Practical Project (Produce a poster showing products on display fixtures) = 50% of term mark</p> <p>Learners must produce a poster showing fixtures and fitting used in the following sub-sectors and describe the products merchandised on each one</p> <ul style="list-style-type: none">• CFTA stores (A minimum of 2 fixtures and fittings)• Food stores (A minimum of 4 fixtures and fittings)• Furniture stores. (A minimum of 2 types of display)• Speciality stores (A minimum of 6 fixtures and fittings) <p>Fixtures and fittings can be drawn or photographs taken by the learner or pictures sourced from the internet.</p> <ul style="list-style-type: none">• The Fixtures and fittings (50 % of total marks of project)• The products merchandised on them. (50 % of total marks of project)			

Total for Activity 1 Marks to be converted to 50% of total term mark

Activity 2 – PAT Practical Project (Produce a poster showing pricing and ticketing methods) = 25% of term mark

Learners must produce a poster showing pricing and ticketing methods used in the following sub-sectors

- CFTA stores (A minimum of 3 examples)
- Food stores (A minimum of 4 examples)
- Furniture stores. (A minimum of 2 examples)
- Speciality stores (A minimum of 6 examples)

Examples can be drawn or photographs taken by the learner or pictures sourced from the internet.

Total for Activity 2 Marks to be converted to 25% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done through terms 1 to 3

Year 2 Term 4

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Recording Sales: Scan and total sales	<ul style="list-style-type: none"> Identify PoS equipment and parts Scan products and total sales: <ul style="list-style-type: none"> Non-computerised equipment and methods Computerised equipment and methods Steps to recording a sale What to do if an item will not scan Loss prevention when recording sales Concept and procedures at End of shift Concept of overs and shorts How businesses manage overs and shorts How to enhance customer service when on a till 	Text book Point of sale (Till) Stock to scan Learners must demonstration (practical exercise) using a PoS (till) to record and total sales NOTE: This week's lesson and week two's lesson can be combined and then learners given the opportunity to practice both objectives during week 3 and 4 and be assessed in week 4
2	Recording Sales: Accept and record	<ul style="list-style-type: none"> Accept the different forms of payment <ul style="list-style-type: none"> Cash 	Text book Example of the different forms of payment

	payment	<ul style="list-style-type: none"> ○ Cheque ○ Credit card ○ Debit card ○ Gift vouchers/loyalty vouchers ○ Coupons ○ Hire purchase ○ Accounts ○ Buy Aid ○ Lay Buy ○ Methods for processing the different forms of payment ○ Loss prevention when accepting payment ○ Fraud 	<p>PAT (Practical assessment task or Project) should start in week four.</p> <p>Learners must demonstration (practical exercise) using a PoS (till) to record and total sales and accept and record payment and give change where applicable</p>
3 - 5	<p>Recording Sales:</p> <p>Using the till</p>	<ul style="list-style-type: none"> • Record and total sales and process payment and give change accurately in a manner that minimises losses and enhances customer service 	<p>These 3 weeks is given over to all learners to give them the opportunity to record and total sales and process payment and give change accurately in a manner that minimises losses and enhances customer service</p> <p>This is fundamental to learners getting a position in a wholesale or retail outlet and learners need to have the</p>

			confidence to do this accurately. For an example of a checklist to use when evaluating learner performance in using the till refer to annexure 7
6 & 7	Recording Sales: Prepare till for cashing up	<ul style="list-style-type: none">Sort payments received in the till<ul style="list-style-type: none">Methods for sorting and counting cash in computerised storesMethods for sorting and counting cash in non computerised storesBundling cashSort non cash tender	Text book Paper clips Learners to demonstrate the ability to sort payments received in the till For an example of a checklist to use when evaluating learner performance in sorting and recording tender received refer to annexure 8
8 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
Activity 1 – PAT Practical Demonstration (record sales on a till and process payment) = 75% of term mark Learners must record a minimum of 20 sales on the till and accept cash plus at least 2 forms of non-cash payment and must give change for some of the cash sales. Total for Activity 1 Marks to be converted to 75% of total term mark Activity 2 Formal written or oral assessment – 25% Scope of work is all the work done throughout the year.			

Year 3 Term 1

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	The Industry: The supply chain	<ul style="list-style-type: none"> Draw the supply chain and explain the role of each of the role players in the chain: <p>Recap of:</p> <ul style="list-style-type: none"> The supply chain Role players in the supply chain The role of each role player in the supply chain The cold chain 	<p>This is a recap and refresher on the supply chain covered in year 1. It is to introduce the Distribution Centres (DCs) and its role in the supply chain</p> <p>Theoretical explanation as well as practical exercise</p> <p>Text book</p> <p>YouTube videos on the Supply Chain</p> <p>The learner to design a poster illustrating the supply chain and show the flow of stock, cash and information through the supply chain</p>
2 & 3	The Industry: Distribution Centres	<ul style="list-style-type: none"> Explain why chain stores have Distribution Centres by explaining how they impact on stock levels and the finances of a business: Draw a section of racking in a Distribution Centre and show where pick and reserve stock would be stored <ul style="list-style-type: none"> The impact of a Distribution Centre on; 	<p>Text book</p> <p>PowerPoint presentation</p> <p>Access the internet for pictures of picking methods and DC equipment</p> <p>Learners to explain why chain stores have Distribution Centres by explaining how they impact on stock levels and the finances of the business</p>

		<ul style="list-style-type: none"> ▪ Stock levels ▪ Finances ○ Cross docking versus storage ○ The need to break bulk ○ Methods for storing and packing different types of merchandise ○ Pick and reserve areas. ○ Replenishing pick areas ○ The different picking methods ○ Equipment used in a Distribution Centre ○ Methods for identifying containers with their destination 	<p>Learners to draw a section of racking in a Distribution Centre and show where pick and reserve stock would be stored</p> <p>PAT (Practical assessment task or project) should start in week three.</p>
4	<p>Profit:</p> <p>The Income Statement</p>	<ul style="list-style-type: none"> • Describes what you must do to each entry on an Income Statement if you want to improve the net profit of an outlet <ul style="list-style-type: none"> ○ Sales ○ Cost of goods sold ○ Shrinkage ○ Gross Profit 	<p>This is a recap and refresher on the Income Statement prior to moving onto Budgets and analysing the Income Statement.</p> <p>Text book</p> <p>PowerPoint presentation</p> <p>Learners to describes in a drawing or in text what they must</p>

		<ul style="list-style-type: none"> ○ Other Income ○ Expenses ○ Net profit before interest ○ Interest (received and paid) ○ Net profit before tax ○ Tax ○ Net profit after tax ○ Dividend ○ Retained income ○ How each entry affects the Net profit of the outlet and business 	do to each entry if they want to improve the net profit of an outlet
5 & 6	Profit: Budgets	<ul style="list-style-type: none"> • Compare actual figures to budgeted figures for an outlet and identify areas requiring improvement <ul style="list-style-type: none"> ○ The concept of a budget ○ Why budgets are necessary ○ How they are used in the industry ○ Compare actual figures to budgeted figures and identify shortfalls 	<p>Text book</p> <p>Scenario showing an outlet's actual figures from sales to net profit before interest and budgeted figures for the same entries.</p> <p>Non-controllable expenses should be on budget.</p> <p>Some controllable expenses should show expenditure over budget and others be below budget.</p> <p>Sales should be below budget</p>

			<p>Shrinkage to be above budget and Gross Profit to be below budget</p> <p>Learners to compare actual figures to budgeted figures for an outlet and identify areas requiring improvement</p>
7	<p>Profit:</p> <p>Product mix</p>	<ul style="list-style-type: none"> • Explain the importance of product mix to an outlet. • Identify high and low margin products in different retail stores <ul style="list-style-type: none"> ○ Recap on profit verses volume ○ The concept of product mix ○ How it affects Gross Profit and Net Profit ○ Examples of categories and products that have higher and lower Gross Profit in different types of retailers 	<p>Text book</p> <p>The examples of categories and products that have higher and lower Gross Profit in different types of retailers should be based on retailers in the area</p> <p>Learners to explain the importance of product mix to an outlet.</p> <p>All field exercises require learners to visit stores/shopping area either on their own or through the school transporting them</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit stores in the area and identify high and low margin products in different retail stores in the area</p> <p>Minimum of one lesson at the end of week 7 to be devoted to the presentations</p>

8	Profit: Shrinkage	<ul style="list-style-type: none"> Design a poster showing how the industry tries to prevent internal theft <ul style="list-style-type: none"> Recap on how shrinkage affects the profits of a business General policies of the industry in terms of internal theft Measures used by the industry to prevent internal theft 	Text book Learners to access the internet and/or visit local retailers to investigate what outlets do to minimize internal theft and to design a poster showing how the industry tries to prevent internal theft
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	

Activity 1 –PAT Practical Drawing (identifying the placing of stock on racking in a DC) = 10% of term mark

Learner to draw a section of racking in a DC and show where pick and reserve stock would be stored.

. Use a rubric for assessment purposes.

- The drawing of the racking (10 % of total marks of drawing)
- Placing of pick and reserve stock (90% of total marks of drawing)

Total for Activity 1 Marks to be converted to 10% of total term mark

Activity 2 – PAT (Practical evaluation of performance) = 55% of term mark

Learners must compare actual figures to budgeted figures for an outlet and identify areas requiring improvement

Assessment is done according to a rubric.

Marks must be converted to be 55% of total term mark

Activity 3 – PAT (Practical project) = 10% of term mark

Learners must design a poster showing how the industry tries to prevent internal theft

Assessment is done according to a rubric. Marks must be converted to be 10% of total term mark

Activity 4

Formal written or oral assessment – 25%

Scope of work is all the work done during the term.

Year 3 Term 2

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1 & 2	Customer Service: Service standards	<ul style="list-style-type: none"> Design a checklist to evaluate service in the field Evaluate service in a small store and a large chain store <ul style="list-style-type: none"> Recap on the importance of service in the industry Recap on levels of service Concept - Internal customer Concept - External customer The impact off service on the success of a business Generally accepted service standards Customer service tools Loyalty programmes Mystery shopper Meet & Greet Re-serving customers 	<p>Text book</p> <p>YouTube videos on customer service</p> <p>Discussion on real life experiences</p> <p>Learners to design a checklist to evaluate service in the field</p> <p>For an example of a checklist the learners could design to evaluate service in the field refer to annexure 9.</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to evaluate service in a small store and a chain store.</p> <p>Minimum of one lesson at the end of week 2 to be devoted to the presentations</p>
3	Customer Service:	<ul style="list-style-type: none"> Handle customer queries and complaints <ul style="list-style-type: none"> Examples of queries 	<p>Text book</p> <p>Discussion on personal experiences of good and bad</p>

	Queries & complaints	<ul style="list-style-type: none"> ○ Handling queries ○ Escalating queries ○ Examples of complaints ○ Importance of correct handling of complaints and not guessing ○ Steps to handling complaints ○ Escalating complaints 	<p>handling of queries and complaints</p> <p>Demonstration through role playing</p> <p>Learners to demonstrate in a role play their ability to handle complaints correctly</p>
4	Customer Service: Introducing selling	<ul style="list-style-type: none"> • Match selling concepts to products <ul style="list-style-type: none"> ○ Selling as part of customer service ○ Selling in a part service store like clothing stores ○ Selling in a full-service situation like electrical products ○ Hard sell versus soft sell ○ Getting product knowledge 	<p>Text book</p> <p>Written</p> <p>Learners to match selling concepts to a variety of given products</p>
5	Profit: Improve Gross Profit	<ul style="list-style-type: none"> • Analyse an Income Statement and identify entries needing improvement in order to improve the Gross Profit: <ul style="list-style-type: none"> ○ Methods of improving the different entries that go to make up Gross Profit <ul style="list-style-type: none"> ▪ Sales 	<p>Text book</p> <p>PAT (Practical assessment task or Project) should start in week five.</p> <p>Scenario showing an outlet's income statement with "figures</p>

		<ul style="list-style-type: none"> ▪ Shrinkage ▪ Cost of Goods Sold 	<p>for Sales, Shrinkage and, Cost of Goods sold for “this year” and “last year”</p> <p>Sales should be lower than last year</p> <p>Shrinkage to be higher than last year</p> <p>Cost of Goods sold to be higher than last year and Gross profit to be less than last year</p> <p>Learners to compare “this year” figure to “last year” figures and identify areas requiring improvement</p> <p>Through open class discussion get ideas on what to do to improve Gross profit</p>
6	Stock: Stockrooms	<ul style="list-style-type: none"> • Position categories and stock on storeroom racking <ul style="list-style-type: none"> ○ Why outlets have stockrooms ○ Laying out a stockroom ○ Common rules for stock storage ○ Storing damages & expired stock ○ Packing stock in the stockroom ○ Principles of building stacks safely ○ Housekeeping 	<p>Text book</p> <p>PowerPoint presentation</p> <p>Given a list of categories and stock and a layout of a stockroom, learners must position the categories and stock on the racking in line with the principles of stock storage</p> <p>For an example of a list of stock and drawings of racking and possible answers to this exercise refer to annexure 10</p> <p>For an example of how to build stacks in a stockroom refer to annexure 11</p>

7 & 8	Stock: Receiving	<ul style="list-style-type: none">• Explain how stock should be received in an outlet so as to minimise shrinkage<ul style="list-style-type: none">○ The concept of receiving in the industry○ The importance of accurate receiving and the impact of receiving on shrinkage○ Receiving in small and non-computerised stores○ Receiving in computerised stores○ Loss prevention when receiving	Text book Pictures of technology used to receive stock taken off the internet. Learners to explain (verbally or in writing) how stock should be received in an outlet (computerised or non computerised) so as to minimize shrinkage
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
Activity 1 – PAT (Practical evaluation of performance) = 35% of term mark Learners must compare this year's actual performance to last year's actual performance on an Income Statement for an outlet and identify areas requiring improvement in order to improve the Gross Profit of an outlet Assessment is done according to a rubric Total for Activity 1 Marks to be converted to 35% of total term mark Activity 2 – PAT (Practical project) Drawing = 40% of term mark Learner receives a drawing of a stockroom and drawings of the different racking in the stockroom and must place the different categories of stock on the stockroom			

drawing following the principles learned and must place the products in each category on the racking following the principles learned.

- Layout of stockroom (60 % of total marks of drawing)
- Placing of products (40% of total marks of drawing)

Total for Activity 2 Marks to be converted to 40% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done during term 1 and term 2.

Year 3 Term 3

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Stock: Dispatching	<ul style="list-style-type: none"> Explain when wholesale and retail businesses will dispatch stock and how inaccurate dispatching affects shrinkage <ul style="list-style-type: none"> The concept of Dispatch Reasons for dispatch The impact of inaccurate dispatching on the business Methods for dispatching in small and Non-Computerised businesses Methods for dispatching in Computerised stores Loss prevention when dispatching 	<p>Text book</p> <p>Learners to explain (verbally or in writing) how stock should be dispatched from an outlet (computerised and non computerised) so as to minimise shrinkage</p>
2 & 3	Stock: Ordering methods	<ul style="list-style-type: none"> Identify the different ordering methods applicably to different types of stores: <ul style="list-style-type: none"> Recap on the concept of perpetual inventory How orders are calculated where there is no form of computerisation How orders are calculated where a form of in-store computerisation is available How orders are calculated where perpetual 	<p>Text book</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Field work</p> <p>Learners to visit stores and ask manager how their ordering takes place</p>

		<p>inventory is used</p> <ul style="list-style-type: none"> ○ The role of the buyer and planner in large national chains 	<p>Minimum of one lesson at the start of week 4 to be devoted to the presentations</p>
4	Record Sales	<ul style="list-style-type: none"> • Use a till in a manner that minimises losses and promotes customer service: 	<p>This week is to allow the learners to use the till again in order to gain further practice and to ensure sales are recorded for cash up purposes the following two weeks</p> <p>For an example of a checklist to use when evaluating learner performance in using the till refer to annexure 7</p>
5 & 6	<p>Record sales</p> <p>Cash up</p>	<ul style="list-style-type: none"> • Prepare the different types of tender and complete the documentation to have their till cashed up. <ul style="list-style-type: none"> ○ Methods of cashing up cashiers in a non-computerised store ○ Methods of cashing up cashiers in a semi computerised store ○ Methods of cashing up cashiers in a fully computerised store ○ Computerised money counting equipment ○ Concept of uplifts 	<p>Text book</p> <p>Pictures of money counting equipment off the internet</p> <p>Cashing up stationary</p> <p>PAT (Practical assessment task or Project) should start in week six.</p> <p>Learners must cash up their till under the supervision of the teacher or similar acting as a Cash Up Clerk</p> <p>For an example of a checklist to use when evaluating learner performance in their being cashed up refer to</p>

		<ul style="list-style-type: none"> ○ How to prepare cash to hand in ○ The concept of <ul style="list-style-type: none"> ▪ Bankable ▪ Non-bankable ▪ Already banked ○ Separating and preparing other forms of tender to hand in ○ Recording and documentation ○ Handing over takings 	annexure 12
7	Record sales Control change	<ul style="list-style-type: none"> • Order change and complete change requisition slips <ul style="list-style-type: none"> ○ Methods for controlling change in small stores ○ The change float method in large stores ○ Ordering change per cashier ○ Methods for receiving and checking change ○ Methods for replenish cashier's till drawers 	Text book Change ordering stationary Learners to complete change requisition stationary.

8 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.
<p>Activity 1 – PAT (Practical project) = 75% of term mark</p> <p>Learners must use a till in a manner that minimises losses and promotes customer service and have their till cashed up:</p> <p>Their till must balance within R10 when cashed up</p> <p>Assessment is done according to a rubric.</p> <p>Marks must be converted to be 75% of total term mark</p> <p>Activity 2</p> <p>Formal written or oral assessment – 25%</p> <p>Scope of work is all the work done through terms 1 to 3.</p>		

Year 3 Term 4

1	Merchandising: Importance and principles	<ul style="list-style-type: none"> • Explain the importance of merchandising and principles of merchandising for different target markets <ul style="list-style-type: none"> ○ Recap on the concept of merchandising ○ How merchandising can impact on sales ○ How merchandising must meet the expectations of the store's target market ○ Merchandising principles for higher and lower target markets 	This is a recap and introduction to merchandising in the SIM room Text book Learners to explain the importance of merchandising correctly for a target market and its impact on sales and explain the principles that govern merchandising for the different target markets
2	Merchandising: Displaying stock	<ul style="list-style-type: none"> • Match fixtures and fittings to target market and products displayed <ul style="list-style-type: none"> ○ Fixtures and fittings used in CFTA stores ○ Fixtures and fittings used in Food stores ○ Fixtures and fittings used in Furniture stores ○ Fixtures and fittings used in specialist stores <ul style="list-style-type: none"> ▪ Music ▪ Gift ▪ Books and magazines ▪ Cosmetic 	This is a recap and introduction to merchandising in the SIM room Text book Given a range (pictures) of fixtures and fittings and a list of stock and the different store's target markets learners to match fixtures and fittings to target market and products displayed

		<ul style="list-style-type: none"> ▪ Jewellery <ul style="list-style-type: none"> ○ Fixtures and fittings used in stores aimed at higher and lower target markets 	
3	Merchandising: Pricing and ticketing displays	<ul style="list-style-type: none"> • Match pricing and ticketing to target markets and product offering <ul style="list-style-type: none"> ○ Pricing methods and ticketing used in stores aimed at higher and lower target markets ○ Pricing methods and ticketing used in CFTA stores ○ Pricing methods and ticketing used in Food stores ○ Pricing methods and ticketing used in Furniture stores ○ Pricing methods and ticketing used in speciality stores <ul style="list-style-type: none"> ▪ Music ▪ Gift ▪ Books and magazines ▪ Cosmetic ▪ Jewellery 	<p>This is a recap and introduction to merchandising in the SIM room</p> <p>Text book</p> <p>Given a range (pictures) of tickets and pricing methods and a list of stock and the different store's target markets learners to match pricing and ticketing to target market and products displayed</p>

4	Merchandising Merchandising different categories of stock	<ul style="list-style-type: none"> Identify how to handle the different categories of stock when merchandising <ul style="list-style-type: none"> Cold chain products Fragile items Hazardous merchandise High value items Clothing Footwear 	Text book Written Learners to list the main requirements when merchandising different categories of stock
5	Merchandising Loss prevention	<ul style="list-style-type: none"> Identify how to merchandise so as to prevent losses <ul style="list-style-type: none"> Loss prevention when price marking Loss prevention when filling shelves Loss prevention through maintaining ticketing Loss prevention through stock rotation Loss prevention through housekeeping 	Text book Written Learners to explain how to prevent losses when filling shelves and merchandising
6	Merchandising Changing layouts	<ul style="list-style-type: none"> Explain how to make changes in an outlet <ul style="list-style-type: none"> Changing layouts safely Adjusting shelving in a supermarket Laying out merchandise Laying out shelf edge labels and tickets 	Text book Teacher to demonstrate in the SIM store Learners to explain how to change a layout in a supermarket

7 & 8	Merchandising Shelf filling	<ul style="list-style-type: none"> • Fill shelves, merchandise stock and change a layout: <ul style="list-style-type: none"> ○ How to merchandise the stock carried in the SIM store ○ How to display prices in the SIM store ○ How to display tickets in the SIM store ○ How to adjust shelving and racking ○ How to build floor stacks 	Text book SIM Store Shelving and racking Stock Ticketing PAT (Practical assessment task) should start in week seven. Learners to merchandise stock in the SIM Store, to ensure all items are packed correctly and display prices and ticketing Learners also to demonstrate their ability to change a layout correctly For an example of a checklist to use when evaluating learner performance when doing layouts and filling shelves refer to annexure 13
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment	

		will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.
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Activity 1 – PAT Practical Demonstration (Merchandising) = 40% of term mark

Learner to merchandise stock in the SIM Store, to ensure all items are packed correctly and display prices and ticketing.

Use a rubric for assessment purposes.

- Merchandising/shelf filling (80 % of total marks of demonstration)
- Displaying prices (10% of total marks of demonstration)
- Displaying ticketing (10% of total marks of demonstration)

Total for Activity 1 Marks to be converted to 40% of total term mark

Activity 2 – PAT Practical Demonstration (Doing a layout) = 35% of term mark

Learner to do a layout.

Use a rubric for assessment purposes.

- Removing and handling stock safely (10 % of total marks of demonstration)
- Cleaning the shelves (10 % of total marks of demonstration)
- Laying out products (10% of total marks of demonstration)
- Adjusting shelves (10% of total marks of demonstration)
- Re-merchandising the stock (50 % of total marks of demonstration)
- Putting up shelf edge labels (10% of total marks of demonstration)

Total for Activity 1 Marks to be converted to 35% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done throughout the year.

Year 4 Term 1

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1 & 2	The Industry: Industry specific legislation	<ul style="list-style-type: none"> Provide the full title of applicable legislation and an overview of the aims and objectives of each <ul style="list-style-type: none"> Basic conditions of employment act Sectoral determination Compensation for occupational injuries and diseases act Occupational health & safety act Employment equity act Labour relations act Skills development Unemployment insurance act 	<p>Text Book</p> <p>Theoretical explanation.</p> <p>Information off the internet</p> <p>Oral discussions in pairs and in groups</p> <p>Learners to access the up to date legislation on the internet, provide their full title and an overview of their aims and objectives</p>
3	The Industry: Staff scheduling	<ul style="list-style-type: none"> Schedule staff <ul style="list-style-type: none"> Why does the industry use it? <ul style="list-style-type: none"> Recap on shopping patterns 7-day shopping 24-hour shopping Cost DC deliveries 	<p>Text book</p> <p>Scenario for scheduling staff giving details of expected sales per hour, average taking per Cashier per hour, tasks to be completed on the shop floor and the length of time each should take and a list of available staff</p> <p>PAT (Practical assessment task) should start in week</p>

		<ul style="list-style-type: none"> ○ How it is done in non-computerised stores ○ The advantage to having a computerised staff scheduling system 	<p>three.</p> <p>Learners to demonstrate (practical exercise) scheduling staff for a given case study/scenario.</p>
4	<p>Target Market:</p> <p>Promotions</p>	<ul style="list-style-type: none"> • Design a poster showing in-store and external promotional material used by wholesalers or retailers targeting different target markets <ul style="list-style-type: none"> ○ The concept of promotions ○ Why businesses promote ((Clear aged stock, increase sales, reach new target markets, reach new customers, promote the name of the business)) ○ How different target markets are reached (TV, radio, magazine, knock n drop) ○ Outdoor advertising ○ Methods for in-store promoting ○ The impact of Ticketing and Displays on promotions ○ Supplier stands for promotions 	<p>Text book</p> <p>Newspapers</p> <p>Magazines</p> <p>Photos</p> <p>Internet pictures</p> <p>Learners to design a poster with pictures/photos of in-store and external promotional material used by wholesalers or retailers</p>
5 & 6	Profit	<ul style="list-style-type: none"> • Analyse an Income Statement and propose methods to improve the bottom line of an outlet <ul style="list-style-type: none"> ○ Methods for improving GP 	<p>Text book</p> <p>Scenario showing an outlet's income statement with actual figures from Sales to Net Profit before interest for "this</p>

		<ul style="list-style-type: none"> ○ Expenses <ul style="list-style-type: none"> • The concept of Fixed expenses • The concept of Variable • The concept of Controllable • The concept of Non-Controllable ○ Methods for minimising controllable expenses 	<p>year” and “last year” for learners to identify areas needing improvement and to propose ways to improve those entries (Controllable Expenses and Income and GP)</p> <p>Learners to demonstrate analysing an Income Statement by identifying entries that need improving and proposing ways to improve those entries (Controllable Expenses and Sales and GP)</p>
7	<p>Profit:</p> <p>Shoplifting</p>	<ul style="list-style-type: none"> • Identify ways in which various retailers are trying to minimise shoplifting <ul style="list-style-type: none"> ○ Change rooms – attendants/numbers ○ Blind corners – mirrors ○ High value items – strapping/locked cabinets ○ Back door ○ Security guards ○ Announcements/codes ○ Panic buttons 	<p>Text book</p> <p>All field exercises require learners to visit stores/shopping area either on their own or through the school transporting them</p> <p>Field Exercise</p> <p>Learners to visit retailers and look for ways they are trying to minimise shoplifting</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Minimum of one lesson at the start of week 8 to be devoted to the presentations</p>

8	Profit: Apprehending a shoplifter	<ul style="list-style-type: none">Explain what to do in the event of witnessing a shoplifting incident<ul style="list-style-type: none">Identifying a shoplifterProcedures to follow when witnessing shopliftingApprehending a shoplifterWhat happens in court	Text Book Explanation by SA Police Services (Policeman visit the class and discuss) Learners to explain what to do in the event of witnessing a shoplifting event taking place
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
Activity 1 – PAT Practical Exercise (Scheduling staff) = 25% of term mark Learners to demonstrate scheduling staff for a given case study/scenario. <ul style="list-style-type: none">Identifying store operations that require staff be scheduled to complete (60% of total marks of exercise)Scheduling staff correctly to those operational procedures (40% of total marks of exercise) Total for Activity 1 Marks to be converted to 25% of total term mark Activity 2 – Practical exercise (Improving the bottom line of a wholesale or retail outlet)) = 50% of term mark Learners to demonstrate analysing an Income Statement by identifying entries that need improving and coming up with ideas to improve those entries (Controllable			

Expenses and Sales and GP)

- Identifying all entries that need to be improved by the store team (70 % of total marks of exercise)
- Providing practical ideas for improving identified figures (30% of total marks of exercise)

Total for Activity 2 Marks to be converted to 50% of total term mark

Assessment is done according to a rubric.

Marks must be converted to be 50% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done during term.

Year 4 Term 2

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Customer Service: Health & Safety	<ul style="list-style-type: none"> Explain how to promote safety in the workplace: <ul style="list-style-type: none"> The impact of staff safety on image, productivity and costs The impact of customer safety on image and costs Safety in the stockroom Safety when filling shelves Safety in production areas of a supermarket Safety over hazardous products 	<p>Text book</p> <p>Learners to explain how to promote safety in the workplace</p>
2	Customer Service: Additional services offered	<ul style="list-style-type: none"> Identify which wholesalers and retailers offer additional services <ul style="list-style-type: none"> Additional services provided by wholesalers Additional services provided by retailers Services aimed at target market 	<p>Text book</p> <p>Learners to identify wholesalers or retailers offering additional services by phoning them, visiting stores or accessing the internet</p> <p>To make a presentation to the class on their finding.</p>

			Minimum of one lesson at the end of week 2 to be devoted to the presentations
3	Customer Service: Selling Skills	<ul style="list-style-type: none"> • Demonstrate selling products <ul style="list-style-type: none"> ○ The selling process <ul style="list-style-type: none"> • Approaching the customer • Identifying what the customer wants/needs • Changing features into benefits • Identifying buying signals • Overcoming objections • Closing a sale 	Text book Role plays In groups of three, one acting as the customer, one as the sales assistant and one observing and evaluating with each switching roles and taking all three roles, learners must follow the selling process and sell a product to the customer For an example of a checklist that students can use when evaluating their peers in the role play refer to annexure 14
4	Stock: Receive stock	<ul style="list-style-type: none"> • Receive deliveries and complete paperwork <ul style="list-style-type: none"> ○ Recap on receiving of stock ○ Concept of discrepancies ○ Methods for recording discrepancies 	Text book Stationary Scenarios for receiving stock giving details of orders, supplier invoice and a list of products coming through the door, and blank discrepancy notes

			<p>Refer to annexure 15 for an example and answers of this exercise</p> <p>PAT (Practical assessment task) should start in week four.</p> <p>Simulation (practical exercise) of learners checking a minimum of two deliveries (one to have discrepancies) and completing the paperwork</p>
5	<p>Stock:</p> <p>Dispatch stock</p>	<ul style="list-style-type: none"> • Complete paperwork for the dispatch of stock <ul style="list-style-type: none"> ○ Recap on dispatching stock ○ Completion of paperwork for the return of stock to a supplier as well as for an IBT (Inter-branch transfer) 	<p>Text book</p> <p>Stationary</p> <p>Scenario listing stock to be returned to a supplier and stock to be inter-branched along with blank dispatch notes for the preparation of documents for dispatching of stock</p> <p>Refer to annexure 16 for an example and answers of this exercise</p> <p>Simulation (practical exercise) of learners completing paperwork for the dispatch of stock for a return as well as for an IBT</p>

6	Stock: Calculate orders	<ul style="list-style-type: none"> • Calculate orders <ul style="list-style-type: none"> ○ Recap on methods for ordering manually and all entries that affect the accurate ordering of stock ○ Actual calculation of orders 	Text book Stationary Scenario listing a minimum of 10 products each with the following details – stock on hand, outstanding orders, sales, previous delivery received Calculators Demonstration (practical exercise) of the learners ability to calculate orders accurately
7	Merchandising: Set layouts and planograms	<ul style="list-style-type: none"> • Discuss the advantages and disadvantages of set layouts and planograms <ul style="list-style-type: none"> ○ The concept of and reason for, set layouts ○ In which industries set layouts are used ○ The concept of planograms ○ Different types of planograms ○ Advantages and disadvantages of set layouts 	Text book Examples of planograms Learners to discuss (this could be in the form of a debate) the advantages and disadvantages to having set layouts and planograms in a business

8	Merchandising: External Merchandisers	<ul style="list-style-type: none">• Report on the role of an external merchandiser and how he/she works<ul style="list-style-type: none">○ Explanation of the external merchandising organisation○ Why stores use external merchandisers○ Their role in the industry○ Pros & Cons to using external merchandisers○ Managing external merchandisers	Text book Field Exercise Learners to visit retailers and interview an external merchandiser on his/her role and how he/she works After field work learner's to make a presentation to the class on their finding. Minimum of one lesson at the end of week 8 to be devoted to the presentations
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
Activity 1 – Practical exercise (Receive and check deliveries) = 45% of term mark Learner receives scenario consisting of store orders, supplier delivery note and list of stock being delivered. Learner to check delivery note to orders and match to correct order and decide what stock to accept based on stock ordered and then to check list of stock being delivered to the actual delivery note. Delivery note and discrepancy note to be completed. <ul style="list-style-type: none">• Matching delivery note to order (30 % of total marks of demonstration)			

- Comparing list of stock being delivered to delivery note (30% of total marks of demonstration)
- Completing of delivery note and discrepancy note (40% of total marks of demonstration)

Total for Activity 1 Marks to be converted to 45% of total term mark

Activity 2 – Practical exercise (Calculate orders) = 30% of term mark

Learner receives scenario consisting product, stock on hand, outstanding orders, weekly sales, order frequency, safety factor, pack per case for 10 products and to calculate the required order for each product

Total for Activity 2 Marks must be converted to 30% of total term mark

Activity 3

Formal written or oral assessment – 25%

Scope of work is all the work done during term 1 and term 2.

Year 4 Term 3

WEEK	TOPIC	CONTENT The learner is able to:	Techniques, activities, resources and process notes
1	Merchandising: Visual merchandising	<ul style="list-style-type: none"> Identify method and examples of visual merchandising in different retailers <ul style="list-style-type: none"> The concept and objective When visual merchandising is appropriate Visual merchandising methods for different merchandise Techniques for enhancing visual displays <ul style="list-style-type: none"> Lighting, colour, “other products” balance 	<p>Text book YouTube video on visual merchandising</p> <p>Field Exercise</p> <p>Learners to visit different retailers and identify methods of visual merchandising used and take photos</p> <p>After field work learners to make a presentation to the class on their finding.</p> <p>Minimum of one lesson at the end of week 1 to be devoted to the presentations</p>
2	Recording Sales Using the till	<ul style="list-style-type: none"> Record sales, process payment and be cashed up <ul style="list-style-type: none"> Recap and practical exercise on process of using a till, processing payment and being cashed up. 	<p>This is an opportunity for learners to recap and remind themselves of the processes involved in recording sales, processing the various forms of payment and having their till cashed up prior to learning how to cash up tills.</p>

3	Record Sales: Process uplifts	<ul style="list-style-type: none"> Record and process an uplift <ul style="list-style-type: none"> Concept of uplifts Why uplifts are used in the industry How staff know when to uplift The uplift process Completing uplift stationary Loss control when doing an uplift 	Text book Uplift stationary Practical demonstration Learners to perform an uplift in the SIM room taking turns as both the Cashier and the Cash Office Clerk
4 & 5	Recording Sales: Cash up multiple tills	<ul style="list-style-type: none"> Calculate the overs and shorts of a cashier <ul style="list-style-type: none"> Procedures for cash up of a number of cashiers and reconciling in non-computerised stores Procedures for cash up of a number of cashiers and reconciling in computerised stores Procedures for cash up of a number of cashiers and reconciling in stores with a drop safe. Cash up multiple tills and balance cash up 	Text book Cash up stationary Practical demonstration Week four is for the theoretic input and an exercise in which the learners calculate the overs and shorts of a Cashier Refer annexure 17 for an example of this exercise and model answers Thereafter week 5 is for learner practice and demonstration PAT (Practical assessment task) should start in week

			<p>five.</p> <p>Learners to cash up multiple tills used by other learners and to balance cash up</p>
6 & 7	<p>Recording sales:</p> <p>Prepare banking</p>	<ul style="list-style-type: none"> • Prepare and complete documentation for banking <ul style="list-style-type: none"> ○ The concepts <ul style="list-style-type: none"> ▪ Bankables ▪ Non bankables ▪ Already banked ○ Preparing the deposit of cash in stores without drop safes ○ Preparing the deposit of cash in stores with drop safes ○ How to complete the required documentation ○ Finalising non- bankable tender ○ Finalising already banked tender 	<p>Text book</p> <p>Banking stationary</p> <p>Week six is for the theoretic input with week 7 for learner practice and demonstration</p> <p>Learners to simulate the preparation of the banking and the completion of required documentation</p> <p>For an example of a checklist to be used when evaluating learner performance in cashing up and balancing multiple tills refer to annexure 18</p>
8	<p>Recording Sales:</p> <p>Deposit through cash collection guards</p>	<ul style="list-style-type: none"> • List the documentation to be completed when depositing through cash collection guards <ul style="list-style-type: none"> ○ Danger of carrying cash to the bank 	<p>Text book</p> <p>Cash collection guard's stationary</p>

		<ul style="list-style-type: none">○ Small stores versus large stores○ Reason for using cash collection guards○ How they work○ Depositing via cash collection guards○ Controlling change through cash collection guards	Learners to list the documentation to be completed
9 – 10	Formal Assessment	The weeks allocated for formal assessment are integrated across the weeks planned for teaching and learning. The assessment will consist of Practical Task/s with a 75% weighting and a Theory test with a 25% weighting.	
<p>Activity 1 – Demonstration (Cashing up and balancing multiple tills) = 50% of term mark</p> <p>Learner to cash up a minimum of 3 tills and balance the takings.</p> <p>Total for Activity 1 Marks to be converted to 50% of total term mark</p> <p>Activity 2 – Demonstration (Prepare banking as in a non-drop safe store ready to be taken to the bank) = 25% of term mark</p> <p>Learner to consolidate bankables and prepare deposit slip and collate non bankables as if ready to be filed.</p> <p>Total for Activity 2 Marks to be converted to 25% of total term mark</p> <p>Activity 2</p> <p>Formal written or oral assessment – 25%</p> <p>Scope of work is all the work done through terms 1 to 3.</p>			

Year 4 Term 4

WEEK	TOPIC	CONTENT	Techniques, activities, resources and process notes
		Revision and consolidation	
1	The Industry	Focus on: <ul style="list-style-type: none"> • The supply chain and roles of role players • Categories and sub categories • Internal and external support functions • Stakeholders 	Help learners summarise the work Use quizzes, word search games, flash cards to introduce fun into this revision Write informal class tests on daily revision and let learners mark their own tests
2	Profit	Revision and consolidation Focus on: <ul style="list-style-type: none"> • In-store activities that impact on the bottom line of an outlet • Analysing an Income Statement and proposing ways to improve the bottom line of an outlet 	Give the learners scenarios. Allow learners to work in groups to analyse an Income Statement and to propose ways to improve the bottom line of an outlet
3	Customer service and target markets	Revision and consolidation Focus on:	Help learners summarise the work Use quizzes, word search games, flash cards to introduce

		<ul style="list-style-type: none"> • The LSM groups • The different levels of service • General standards of service expected of the different target markets 	<p>fun into this revision</p> <p>Write informal class tests on daily revision and let learners mark their own tests</p>
4	Stock	<p>Revision and consolidation</p> <p>Focus on:</p> <ul style="list-style-type: none"> • Receiving of stock • Dispatching of stock • Calculating orders 	<p>Give the learners scenarios.</p> <p>Allow learners to work in groups to receive stock and complete documentation and to complete documentation for dispatching as well as to calculate orders</p>
5-10	External examination	<p>External moderation of school assessment over terms 1, 2 and 3 = 50% of qualification</p> <p>Complete external Practical Assessment Task (PAT) = 25% of qualification</p> <p>Formal external assessment written test or oral = 25% of qualification</p>	

SECTION 4

ASSESSMENT

4.1 Introduction

This section on assessment *standardises* the recording and reporting processes for the Technical Occupational Curriculum and Assessment Policy Statement that is offered in schools that offer this learning programme. It also provides a policy framework for the management of school-based assessment and school assessment records.

It is critically required of teachers to offer all measures of differentiated assessment as outlined in Chapter 9 of the National Protocol for Assessment. Especially learners in special schools who follow the Technical Occupational Curriculum over a period of four years have diverse learning styles and support needs. Since a learner or learners may be functioning on different levels, the assessment / recording / reporting system must make provision to reflect the level(s) of each learner. Each learner, regardless of his/her number of years in the school, must have access to the standard of assessment best suited to his/her needs. The learner's *abilities* determine what will be expected of him/her and the *pacing* of instruction must accommodate each individual learner within a framework of high expectations (See Chapter 9 of the National Protocol for Assessment).

Learners are also eligible for Accommodations and Concessions as outlined in the Standard Operating Procedures for the Assessment of Learners who Experience Barriers to Assessment from Grade R to 12 (2017).

All decisions related to differentiated assessment are made through completing the protocols as outlined in the Policy on Screening, Identification, Assessment and Support (2014) and recorded and tracked through the Individual Support Plans of learners.

4.2 Assessment Principles

4.2.1 Definition

Assessment is a continuous planned process of identifying, gathering and interpreting information about the performance of learners, using various forms of assessment. It involves four steps: generating and collecting evidence of achievement; evaluating this evidence; recording the findings and using this information to understand and thereby assist the learner's development in order to improve the process of learning and teaching. Assessment should be both informal (Assessment

for Learning) and formal (Assessment of Learning). In both cases regular feedback should be provided to learners to enhance the learning experience.

Assessment is a process that measures individual learners' attainment of knowledge (content and concepts) and skills by collecting, analysing and interpreting the data and information obtained from this process to:

- Enable the teacher to judge a learner's progress in a reliable way;
- Inform learners of their strengths, weaknesses and progress; and
- Assist teachers, parents and other stakeholders in making decisions about the learning process and the progress of learners.

Assessment should be mapped against the content, skills, intended aims and topics specified in the learning programme. In both informal and formal assessments, it is important to ensure that in the course of a school year:

- All of the topics and content are covered;
- The full range of skills is included; and
- A variety of different forms of assessment are used.

4.2.2 Informal Assessment or Daily Assessment

Assessment for learning has the purpose of continuously collecting information on a learner's achievement that can be used to improve their learning. Informal assessment is a daily monitoring of learners' progress. This is done through observations, discussions, practical demonstrations, learner-teacher conferences, informal classroom interactions, etc. Informal assessment may be as simple as stopping during the lesson to observe learners or to discuss with learners how learning is progressing. Informal assessment should be used to provide feedback to the learners and to inform planning for teaching, but need not be recorded. It should not be seen as separate from learning activities taking place in the classroom. Learners or teachers can assess their performance in the tasks. Self-assessment and peer assessment actively involves learners in assessment. This is important as it allows learners to learn from and reflect on their own performance. The results of the informal daily assessment tasks are not formally recorded unless the teacher wishes to do so. **The results of daily, informal assessment tasks are not taken into account for progression, promotion and certification purposes.**

Informal, on-going assessments should be used to scaffold the acquisition of knowledge and skills and should be the stepping stones leading up to the formal tasks in the Programmes of Assessment.

4.2.3 Formal Assessment

All assessment tasks that make up a formal programme of assessment for the year are regarded as Formal Assessment. Formal Assessment Tasks are marked and formally recorded by the teacher for progression and certification purposes. All Formal Assessment Tasks are subject to moderation for the purpose of quality assurance and to ensure that appropriate standards are maintained. Formal assessment tasks form part of a year-long formal Programme of Assessment.

a. Why use a Formal Assessment Task

“Formal Assessment Task (assessment of learning)” – is a systematic way of assessment used by teachers to determine how well learners are progressing in a level and in a particular subject.

b. What is a Formal Assessment Task?

It is a set of questions and or instructions that learners need to respond to. A task may consist of a range of activities. A formal task must be valid, fair and reliable and must cover sufficient knowledge and or skills to report on the learners' progress.

Teachers must ensure that assessment criteria are very clear to the learners before the assessment process commences. This involves explaining to the learners which knowledge and skills are being assessed and the required length of responses. Feedback should be provided to the learners after assessment and could take the form of whole-class discussion or teacher-learner interaction. Examples of formal assessments include projects, oral presentations, simulations, performances, tests, examinations, practical demonstrations, etc. The **forms of assessment** used should be appropriate to the age and the developmental level of the learners as well as the context of the subject or skills being assessed. The assessment tasks should be carefully designed to cover the topic, content and or skills of the subject. The design of these tasks should therefore ensure that a variety of skills are assessed.

Practical Assessment Tasks allow for learners to be assessed on a regular basis during the school year and also allow for the assessment of skills that cannot be assessed in a written format, e.g. test or examination.

Assessment in the General Certificate of Education: Technical Occupational (GCE: TO)

Assessment in the GCE: TO is underpinned by the objectives of the National Qualifications Framework (NQF). These objectives are to:

- Create an integrated national framework for learning achievements.
- Facilitate access to and progression within education, training and career paths.
- Enhance the quality of education and training.
- Redress unfair discrimination and past imbalances and thereby accelerate employment opportunities.
- Contribute to the holistic development of the learner by addressing:
 - Social adjustment and responsibility;
 - Moral accountability and ethical work orientation;
 - Economic participation; and
 - Nation-building.

The principles that drive these objectives are:

- ***Integration***

To adopt a unified approach to education and training that will strengthen the human resources development capacity of the nation.

- ***Relevance***

To be dynamic and responsive to national development needs.

- ***Credibility***

To demonstrate national and international values and acquired competencies and skills so as to ensure the recognition of the qualification to be attained.

- ***Coherence***

To work within a consistent framework of principles and certification.

- ***Flexibility***

To allow for creativity and resourcefulness when achieving skills to cater for different learning styles and use a range of assessment methods, instruments and techniques.

- **Participation**

To enable stakeholders to participate in setting standards and co-ordinating the achievement of the qualification.

- **Access**

To address barriers to learning at each level to facilitate learners' progress.

- **Progression**

To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

- **Portability**

To enable learners to transfer parts of a qualification from one learning institution and/or employer to another institution or employer.

- **Articulation**

To allow for vertical and horizontal mobility in the education system when pre-requisites for accreditation have been successfully completed.

- **Recognition of Prior Learning**

To grant credits for a unit of learning following an assessment or if a learner possesses the capabilities specified in each skills area.

- **Validity of assessments**

To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:

- Clearly stating the skill to be assessed;
- Selecting the appropriate or suitable evidence;
- Matching the evidence with a compatible or appropriate method of assessment; and
- Selecting and constructing an instrument(s) of assessment.

- **Reliability**

To assure assessment practices are consistent so that the same result or judgment is arrived at if the assessment is replicated in the same context. This demands consistency in the interpretation of evidence; therefore, careful monitoring of assessment is vital.

- ***Fairness and transparency***

To verify that no assessment process or method(s) hinders or unfairly advantages any learner. The following could constitute unfairness in assessment:

- Inequality of opportunities, resources or teaching and learning approaches;
- Bias based on ethnicity, race, gender, age, disability or social class;
- Lack of clarity regarding topic, content or skill being assessed; and
- Comparison of learner's work with that of other learners, based on learning styles and language.

- ***Practicability and cost-effectiveness***

To integrate assessment practices within the teaching and learning process and strive for cost and time-effective assessment.

4.3 Managing Assessment

Assessor Requirements

Assessors must be subject specialists with adequate formal assessment experience. If the teacher conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process to ensure the quality and integrity of assessments for the qualification.

Types of Assessment

Assessment benefits the learner and the teacher. It informs learners about their progress and helps teachers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.

- **Baseline assessment:** At the beginning of a level or learning experience, baseline assessment establishes the knowledge, skills, values and attitudes (SKVAs) that learners bring to the classroom. This knowledge assists teachers to plan learning programmes and learning activities.
- **Diagnostic assessment:** This assessment diagnoses the nature and causes of barriers to learning experienced by specific learners. It is followed by guidance, appropriate support and intervention strategies. This type of assessment is useful to make referrals for learners requiring specialist help.

- **Formative assessment (Informal Assessment):** This assessment monitors and supports teaching and learning. It determines learners' strengths and weaknesses and provides feedback on progress. It determines if a learner is ready for summative assessment.
- **Summative assessment (Formal Assessment)** This type of assessment gives an overall picture of student progress at a given time. It determines whether the student is sufficiently competent to progress to the next level.

Planning Assessment

An assessment plan should cover three main processes:

- **Collecting evidence:** The assessment plan indicates which learning programme topics, content and skills will be assessed, what assessment method or activity will be used and when this assessment will be conducted.
- **Recording:** The process of recording refers to the assessment instruments or tools with which the assessment will be captured or recorded. Therefore, appropriate assessment instruments must be developed or adapted.
- **Reporting:** All the evidence is put together in a report to deliver a decision for the subject.

Methods of Assessment

Methods of assessment refer to who carries out the assessment and includes teacher assessment, self-assessment, peer assessment and group assessment.

TEACHER ASSESSMENT	The Teacher assesses learners' performance against given criteria in different contexts, such as individual work, group work, etc.
SELF-ASSESSMENT	Learners assess their own performance against given criteria in different contexts, such as individual work, group work, etc.
PEER ASSESSMENT	Learners assess another student or group of learners' performance against given criteria in different contexts, such as individual work, group work, etc.

GROUP ASSESSMENT	Learners assess the individual performance of other learners within a group or the overall performance of a group of learners against given criteria.
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Task lists and **checklists** show the learners what needs to be done. They consist of short statements describing the expected performance in a particular task. The statements on the checklist can be ticked off when the learner has adequately achieved the criterion. Checklists and task lists are useful in peer or group assessment activities.

Rubrics are a hierarchy (graded levels) of criteria with benchmarks that describe the minimum level of acceptable performance or achievement for each criterion. It is a different way of assessment and cannot be compared to tests. Each criterion described in the rubric must be assessed separately. Mainly, two types of rubrics, namely holistic and analytical, are used.

Competence Descriptions

All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not simply be a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) a learner must demonstrate to achieve each level of the rating scale. When teachers or assessors prepare an assessment task or question, they must ensure that the task or question addresses an aspect of a topic or skill. The relevant content must be used to create the rubric to assess the task or question. The descriptions must clearly indicate the minimum level of attainment for each category on the rating scale.

Strategies for Collecting Evidence

A number of different assessment instruments may be used to collect and record evidence.

Examples of instruments that can be (adapted and) used in the classroom include:

Record sheets: The teacher observes learners working in a group. These observations are recorded in a summary table at the end of each task. The teacher can design a record sheet to observe learners' interactive and problem-solving skills, attitudes towards group work and involvement in a group activity.

Checklists: Checklists should have clear categories to ensure that the objectives are effectively met. The categories should describe how the activities are evaluated and against what criteria they are evaluated. Space for comments is essential.

School Assessment Programme

The **Programme of Assessment** is designed to spread formal assessment tasks in all subjects in a school across a term.

The programme of assessment should be recorded in the Teacher's planning file (Portfolio of Assessment) for each subject.

The following should at least be included in the Teacher's File:

- A contents page;
- The formal schedule of assessment;
- The requirements for each assessment task;
- The tools used for each assessment task;
- Recording instrument(s) for each assessment task; and
- A mark sheet and report for each assessment task.

The learner's Evidence of Performance must at least include:

- A contents page;
- The assessment tasks according to the assessment programme as indicated below;
- The assessment tools or instruments for the task; and
- A record of the marks (and comments) achieved for each task.

Where tasks cannot be contained as evidence in the Portfolio of Evidence (PoE), its exact location must be recorded and it must be readily available for moderation purposes.

Assessment across the four years

Year 1 Reporting only in the term when the skill is done.

The GCE: Technical Occupational Qualification at NQF Level 1 is a four-year Learning Programme. In year one a learner is exposed to a number of Occupational Subjects. Each subject is offered over a ten-week period (one term) in Year 1, where the learner is exposed to the basic skills required for the subject. By the end of year 1 the learner will select a minimum of one skill for the qualification.

Year 1	Formal School-Based Assessments	
	Learner performance in the Term:	
	Practical 75% *	
	Theory 25%	
Term Report	100%	

Years 2 and 3

Year 2 will focus on a broad overview of the subject with a basic understanding and mastery of some of the basic skills required in the subject. Year 3 will focus on the consolidation of the basic skills and the addition of more advanced skills. Learners must in Year 3 start to develop a greater degree of independent mastery of the subject skills

Year 2/3	Formal School-Based Assessments			Final End-of-Year Assessments
	Term 1	Term 2	Term 3	Term 4
	Practical 75% *	Practical 75% *	Practical 75% *	o Practical 75%
	Theory 25%	Theory 25%	Theory 25%	
				o Pen and Paper Test/ Exam 25%
Term Report	100%	100%	100%	
End of Year	SBA 75%			25%

Year 4 Qualification year

In year 4 the focus shifts to the World of Work. Learners must consolidate required skills for the qualification and may engage in workplace exposure for a short period of time during the fourth year. Learners develop independent mastery of skills to be competent within the workplace

Year 4	Formal School-Based Assessments			Final End-of-Year Assessments
	Term 1	Term 2	Term 3	Term 4
	Practical 75% *	Practical 75% *	Practical 75% *	External Practical Assessment Task 25%
	Theory 25%	Theory 25%	Theory 25%	
				External
Term Report	100%	100%	100%	Pen and Paper Test 25%
End of Year	SBA 50%			External Exams 50%

CLARIFICATION ON ASSESSMENT PERIODS

Year 2 and 3:

Term 1 theory assessment to consist of work done in term 1 only

Term 2 theory assessment to consist of work done in terms 1 and 2

Term 3 theory assessment to consist of work done in term 3 only

Term 4 theory assessment to consist of work done in terms 3 and 4

Year 4:

Term 1 theory assessment to consist of work done in term 1 only

Term 2 theory assessment to consist of work done in terms 1 and 2

Term 3 theory assessment to consist of work done in terms 1, 2 and 3

Term 4 Theory completed in the year

Timing of formal assessment

Suggested Program of Assessment for Wholesale and Retail

YEAR 1					
Term	Content/ concept/skill	Activities	Forms of Assessment	%	FATs based on activities in CAPS: SV
Year 1	<ul style="list-style-type: none"> Understanding the Wholesale & Retail Industry Plan to improve the profit of a wholesale or retail business Identify different target markets and how they impact on retail businesses Identify standards of service expected of the industry Explain the importance of stock control and receive and dispatch stock 	Activity 1 Produce a poster	Practical Project	35%	FAT 1
		Activity 2 Produce a poster	Practical Project	40%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	

YEAR 2					
Term	Content/ concept/skill	Activities	Forms of Assessment	%	FATs based on activities in CAPS: TO
Term 1	<ul style="list-style-type: none"> Understanding the Wholesale & Retail Industry 	Activity 1 Produce a poster	Practical Project	75%	FAT 1
		Activity 2 Respond to questions	Pen and paper test (Oral or written)	25%	

Term 2	<ul style="list-style-type: none"> Plan to improve the profit of a wholesale or retail business Identify different target markets and how they impact on retail businesses Identify standards of service expected of the industry Explain the importance of stock control and receive and dispatch stock 	Activity 1 Sort, tidy and count stock	Practical demonstration	75%	FAT 2
		Activity 2 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 3	<ul style="list-style-type: none"> Explain how different categories are merchandised and merchandise stock 	Activity 1 Produce a poster	Practical Project	50%	FAT 3
		Activity 2 Produce a poster	Practical Project	25%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 4	<ul style="list-style-type: none"> Record sales, process payment, cash up tills and bank takings 	Activity 1 Use a PoS	Practical Demonstration	75%	FAT 4
		Activity 2 Respond to questions	Pen and paper test (Oral or written)	25%	

YEAR 3					
Term	Content/ concept/skill	Activities	Forms of Assessment	%	FATs based on activities in CAPS: TO
Term 1	<ul style="list-style-type: none"> Understanding the Wholesale & Retail Industry Plan to improve the profit of a wholesale or retail business 	Activity 1 Identify the positioning of stock on racking in a DC	Practical Drawing	10%	FAT 1
		Activity 2 Evaluate financial performance	Practical Evaluation	55%	
		Activity 3 Produce a poster	Practical Project	10%	
		Activity 4 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 2	<ul style="list-style-type: none"> Identify standards of service expected of the industry Plan to improve the profit of a wholesale or retail business Explain the importance of stock control and receive and dispatch stock 	Activity 1 Evaluate financial performance	Practical Evaluation	35%	FAT 2
		Activity 2 Place categories and stock on racking in a stockroom	Practical project	40%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 3	<ul style="list-style-type: none"> Explain the importance of 	Activity 1 Use a till	Practical Demonstration	75%	FAT 3
		Activity 2	Pen and paper test	25%	

	stock control and receive and dispatch stock <ul style="list-style-type: none"> Record sales, process payment, cash up tills and bank takings 	Respond to questions	(Oral or written)		
Term 4	<ul style="list-style-type: none"> Explain how different categories are merchandised and merchandise stock 	Activity 1 Merchandise stock Activity 2 Do a layout Activity 3 Respond to questions	Practical Demonstration Practical Demonstration Pen and paper test (Oral or written)	40% 35% 25%	FAT 4

YEAR 4					
Term	Content/ concept/skill	Activities	Forms of Assessment	%	FATs based on activities in CAPS:TO
Term 1	<ul style="list-style-type: none"> Understanding the Wholesale & Retail Industry Plan to improve the profit of a wholesale or retail business Identify different target markets and how they impact on retail businesses 	Activity 1 Schedule staff Activity 2 Evaluate financial performance Activity 3 Respond to questions	Practical Exercise Practical Evaluation Pen and paper test (Oral or written)	25% 50% 25%	FAT 1

Term 2	<ul style="list-style-type: none"> Identify standards of service expected of the industry Explain the importance of stock control and receive and dispatch stock Explain how different categories are merchandised and merchandise stock 	Activity 1 Receive stock	Practical exercise	45%	FAT 2
		Activity 2 Calculate orders	Practical Exercise	30%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 3	<ul style="list-style-type: none"> Explain how different categories are merchandised and merchandise stock Record sales, process payment, cash up tills and bank takings 	Activity 1 Cash up tills	Practical Demonstration	50%	FAT 3
		Activity 2 Prepare banking	Practical Demonstartion	25%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	
Term 4	Core content and Concept across the years	External moderation of school assessment over terms 1, 2 and 3.		50%%	GCE: TO Qualification
		Activity 1 Practical	Formal external Practical Assessment Task	25%	
		Activity 2 Respond to questions	Formal external assessment: Written test (or oral where necessary)	25%	

Recording and Reporting

Recording is a process in which the teacher documents the level of a learner's performance in a specific assessment task. It indicates learner progress towards the achievement of the knowledge and skill. Records of learner performance should provide evidence of the learner's progression. Records of learner performance should also be used to verify the progress made by teachers and learners in the teaching and learning process. Reporting is a process of communicating learner performance to learners, parents, schools, and other stakeholders. Learner performance can be reported in a number of ways. These include report cards, parents' meetings, school visitation days, parent-teacher conferences, phone calls, letters, class or school newsletters, etc.

Good record keeping is essential in all assessment, particularly in continuous assessment. A record book or file must be kept up to date by each teacher. It should contain:

- Learners' names;
- Dates of assessment;
- Name and description of the assessment activity;
- The results of assessment activities, according to Subject; and
- Comments for support purposes.

Teachers report in percentages against the subject. The various achievement levels and their corresponding percentage bands are as shown in the table below. Recording is a process in which the teacher documents the level of a learner's performance. Teachers record the actual raw marks against the task using a record sheet. Records of learner performance should also be used to verify the progress made by teachers and learners in the teaching and learning process. Records should be used to monitor learning and to plan ahead.

Note: The seven-point scale should have clear descriptions that give detailed information for each level. Teachers will record actual marks against the task by using a record sheet; and report percentages against the subject on the learners' report cards.

Codes and percentages for reporting

Rating code	Description of competence	Percentage	Nature of support provided to learners
7	Outstanding achievement	80 – 100	Independent
6	Meritorious achievement	70 – 79	Independent, verbal cues needed
5	Substantial achievement	60 – 69	Minimum support
4	Adequate achievement	50 – 59	Moderate support
3	Moderate achievement	40 – 49	Maximum support (Physical / Verbal)
2	Elementary achievement	30 – 39	Goals to be revisited – Change of direction required.
1	Not achieved	0 – 29	Little / no interest shown in the activity despite maximum support

All records must be accessible, easy to interpret, securely kept, confidential and helpful in the teaching and reporting process. The school assessment policy determines the details of how record books must be completed. Schools are required to provide quarterly feedback to parents on the Programme of Assessment, using a formal reporting tool, such as a report card. The schedule and the report card should indicate the overall level of performance of a learner.

NOTE:

Criterion referencing is best used to describe learner's performance in a skill. Teachers must make use of suitable analytical rubrics when assessing a learner's competence for a specific skill using practical demonstrations.

Progression and Promotion:

Learners will progress with age cohort in this Phase (Year 1-4). Where a learner does not meet the minimum requirements to be promoted to the next year then a learner may spend one extra year in the phase (Year 1-4) to strengthen their ability to achieve the qualification.

4.4 Moderation of Assessment

Moderation refers to the process that ensures that the assessment tasks are fair, valid and reliable. Moderation must be implemented at school, district, and provincial levels as required. Comprehensive and appropriate moderation practices must be in place for the quality assurance of all subject assessments. The Formal School Based Assessment and the practical assessment tasks must be moderated by the relevant subject specialists at the district and, if required, provincial levels in consultation with the moderators at school.

Moderation serves five purposes:

1. It must ascertain whether subject content and skills have been sufficiently covered.
2. The moderator must ensure that the correct balance of cognitive demands are reflected in the assessments.
3. The assessments and marking are of an acceptable standard and consistency.
4. The moderator must make judgements about the comparability of learner performance across schools; whilst recognising that teachers teach in different ways.
5. The subject specialist/moderator must identify areas in which a teacher may need development and support and must ensure that this support is provided.

4.4.1 Internal moderation

Assessment must be moderated according to the internal moderation policy of the School, Provincial and National Departments. Moderation is a continuous process. The moderator's involvement starts with the planning of assessment methods and instruments and follows with continuous collaboration with and support to the assessors. Internal moderation creates common understanding of topics and skills and maintains these across the learning programmes.

4.4.2 External moderation

External moderation is conducted by the Districts and or Provincial offices, Department of Basic Education, Umalusi and, where relevant, the QCTO. The external moderator:

- Monitors and evaluates the standard of all summative assessments;
- Maintains standards by exercising appropriate influence and control over assessors;

- Ensures proper procedures are followed;
- Ensures summative integrated assessments are correctly administered;
- Observes a minimum sample of 12 summative assessments in total;
- Gives written feedback to the relevant quality assessor; and
- Moderates in case of a dispute between an assessor and a student.

Policy on inclusive education requires that assessment procedures for students who experience barriers to learning be customised and supported to enable these students to achieve their maximum potential.

Moderation is therefore an on-going process and not a once-off end-of-year event.

4.5 General

This document should be read in conjunction with:

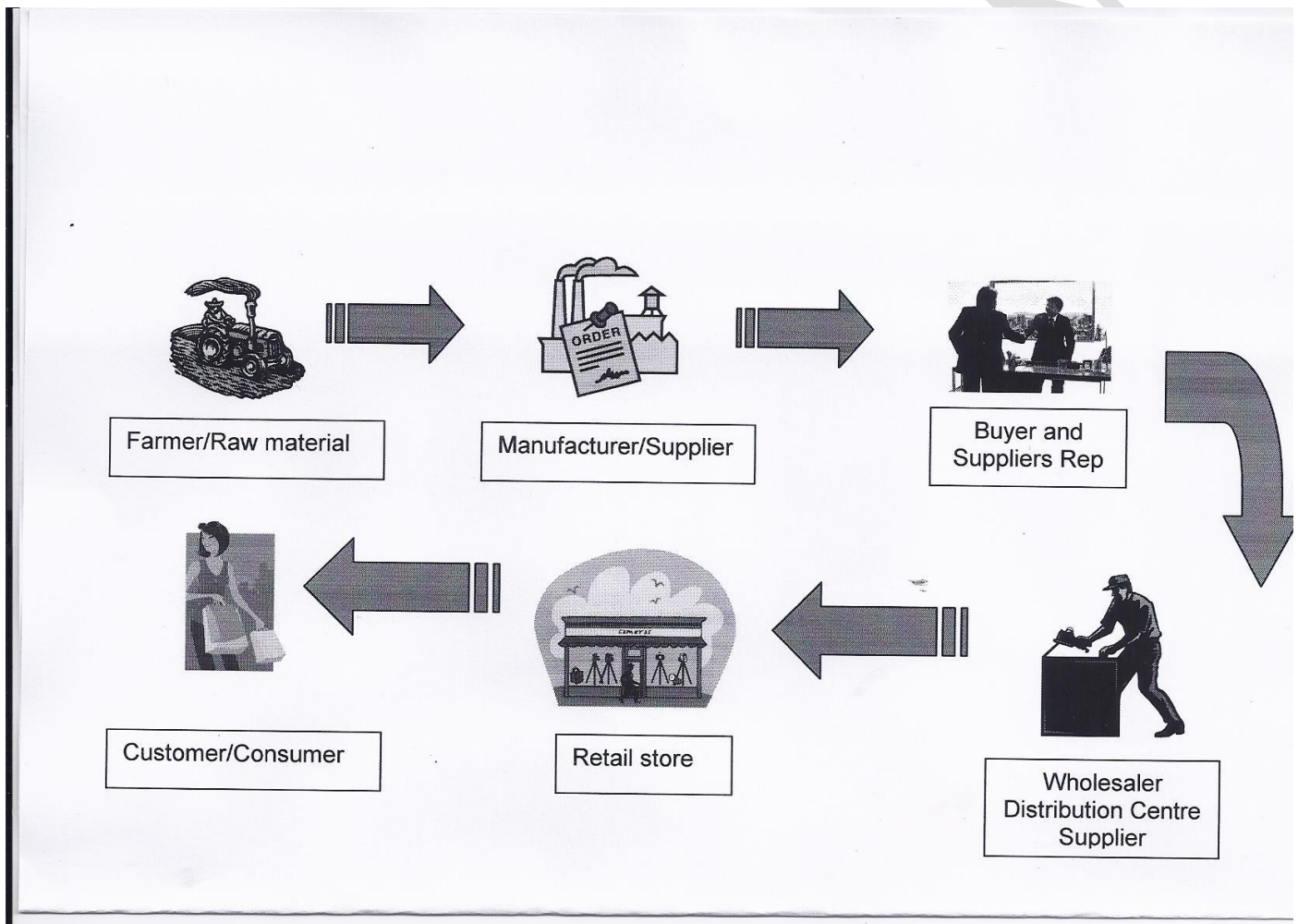
- White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System (2001);
- *National Policy Pertaining to the Programme and Promotion Requirements of the National Curriculum Statement Grades R – 12*; and (NPPPPR) (2011);
- *National Protocol for Assessment Grades R – 12. (NPA) (2011);*
- *Guidelines for Responding to Diversity in the Classroom through the Curriculum and Assessment Policy Statements (2011);*
- *Guidelines to Ensure Quality Education and Support in Special Schools and Special School Resource Centres (2013);*
- *Policy on Screening, Identification, Assessment and Support (2014);*
- *Guidelines for Full-service/Inclusive Schools (2010); and*
- *Standard Operating Procedures for Assessment of Learners who Experience Barriers to Assessment (2016).*

SECTION 5

RESOURCES

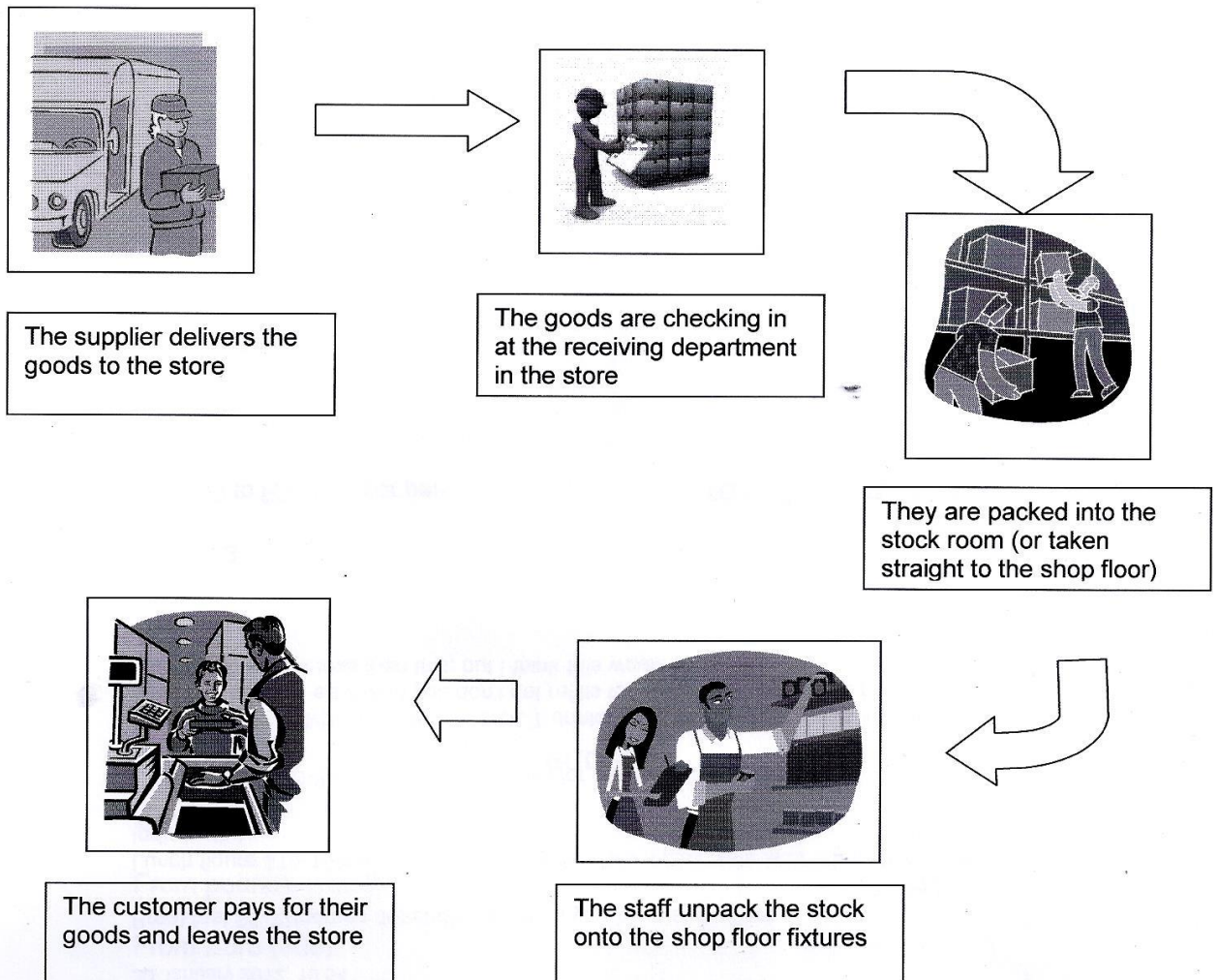
Annexure 1 (Year 1 Week 2)

Example of a Supply Chain drawing



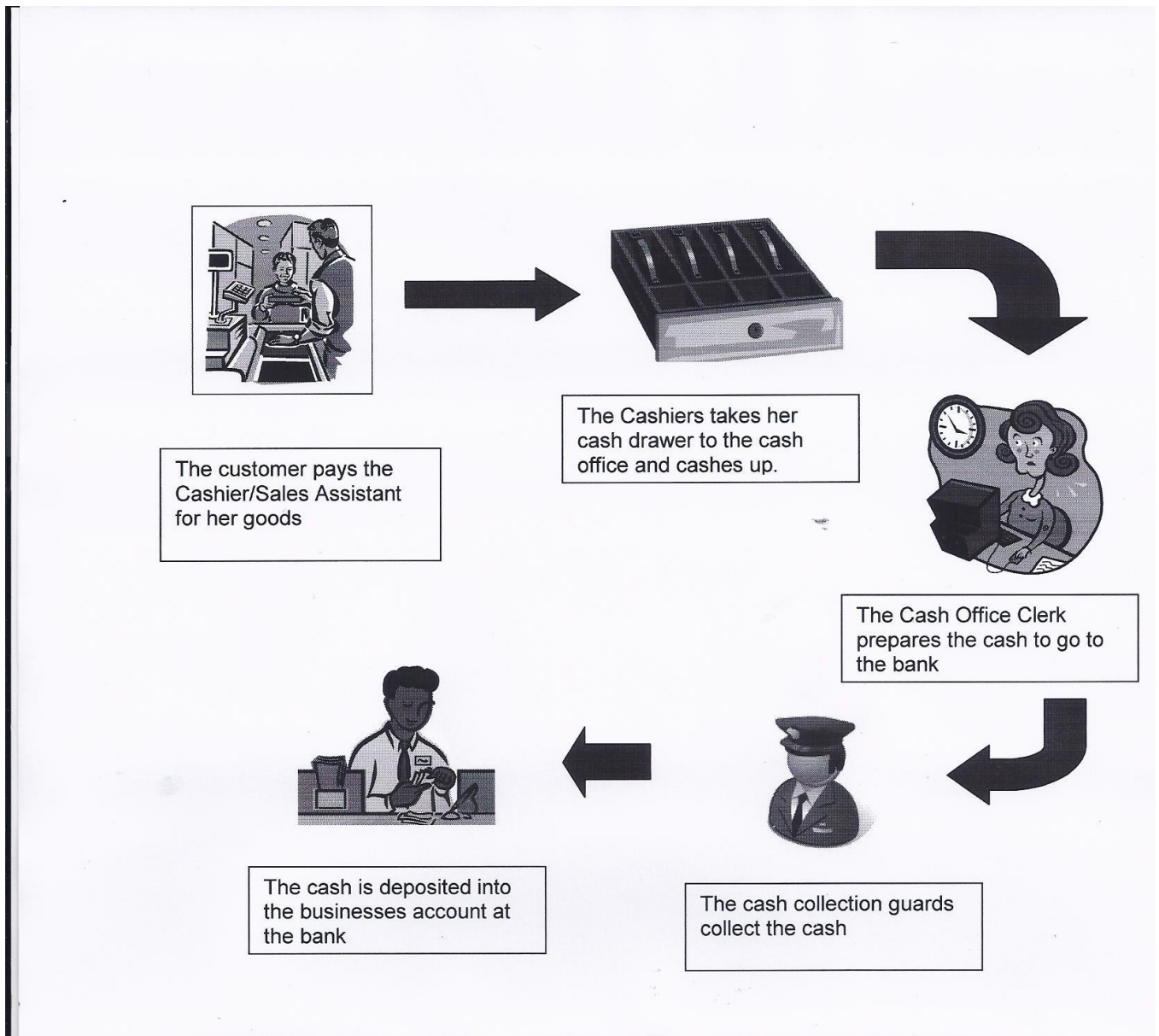
Annexure 2 (Year 2 Term 1 Week 3)

Example of a drawing showing the Flow of Stock through an outlet



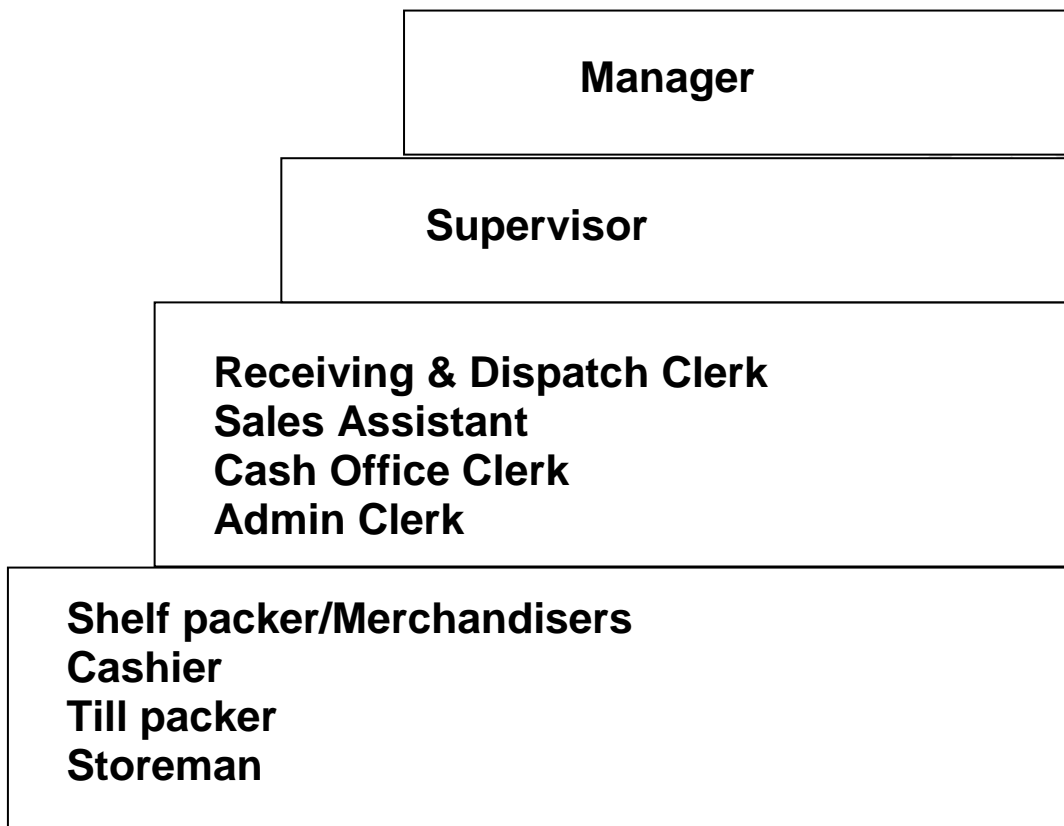
Annexure 3 (Year 2 Term 1 Week 3)

Example of a drawing showing The flow of Cash through an outlet



Annexure 4 (Year 2 Term 1 Week 6)

Example of a drawing showing Job progression in a supermarket



Annexure 5 (Year 2 Term 2 Week 7 & 8)**Example of a Stock Count Sheet**

PRODUCT CODE	DESCRIPTION	STOCKROOM	SHOP FLOOR	TOTAL
123654	Beano dog biscuits Lamb 1 kg			
741258	Darling Yogurt mixed fruits 125ml 6 pack			
951753	Jungle Oats Chocolate 1kg			
369741	Chaka Charcoal (Singles)			
357741	HTH Swimming Pool Acid liquid 500ml			
159258	Radox hand wash refill Vanilla 500 ml			
326598	Nugget Black shoe polish Black			
128546	Ricoffy granules 500g			
463167	John West tinned Tuna fish in brine			

Annexure 6 (Year 2 Term 2 Week 7 & 8)

Example of a checklist that could be used to evaluate learner ability to Sort, Tidy and Count stock

OBSERVIE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING	
1.	The stock count instructions (stock count sheets) are interpreted and used correctly?
2.	Stacks have been squared off ready for the count?
3.	Every item has a correctly completed label?
4.	There is not more than one open box of any item in the stockroom?
5.	Stock is grouped together?
6.	The stock for counting is prepared and ready for the count as required?
7.	Writing of quantities on the sheets are legible?
8.	Stock counts are accurate?

Annexure 7 (Year 2 Term 4 Week 5)

Example of a checklist that could be used to evaluate learner ability to Record sales and process payment

OBSERVIE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING
1. The customer is greeted with a smile and a greeting?
2. Every item is correctly scanned/recorded on the PoS?
3. Where an item does not scan the learner calls for help?
4. The sale is totalled and the customer told of the total?
5. If cash is tendered the learner calls out the amount tendered and puts it aside and only puts it into the till once the customer accpts the change given?
6. Change is correctly counted into the customer's hand?
7. The learner accepts other forms of payment correctly?
8. The goods are packed into a carrier bag so as not to get damaged?
9. The till slip is handed to the customer?
10. The customer is thanked with a smile and given a final greeeting?

Annexure 8 (Year 2 Term 4 Week 7)

Example of a checklist that could be used to evaluate learner ability to Sort tender for cashing up purposes

OBSERVIE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING
1. The learner seperates the float and counts it accurately?
2. Cash notes in the till are grouped by denomination, in packs of 10 with heads facing the same way?
3. All bundles of notes have paper clips in the top left corner?
4. Other forms of tender are sorted and grouped?

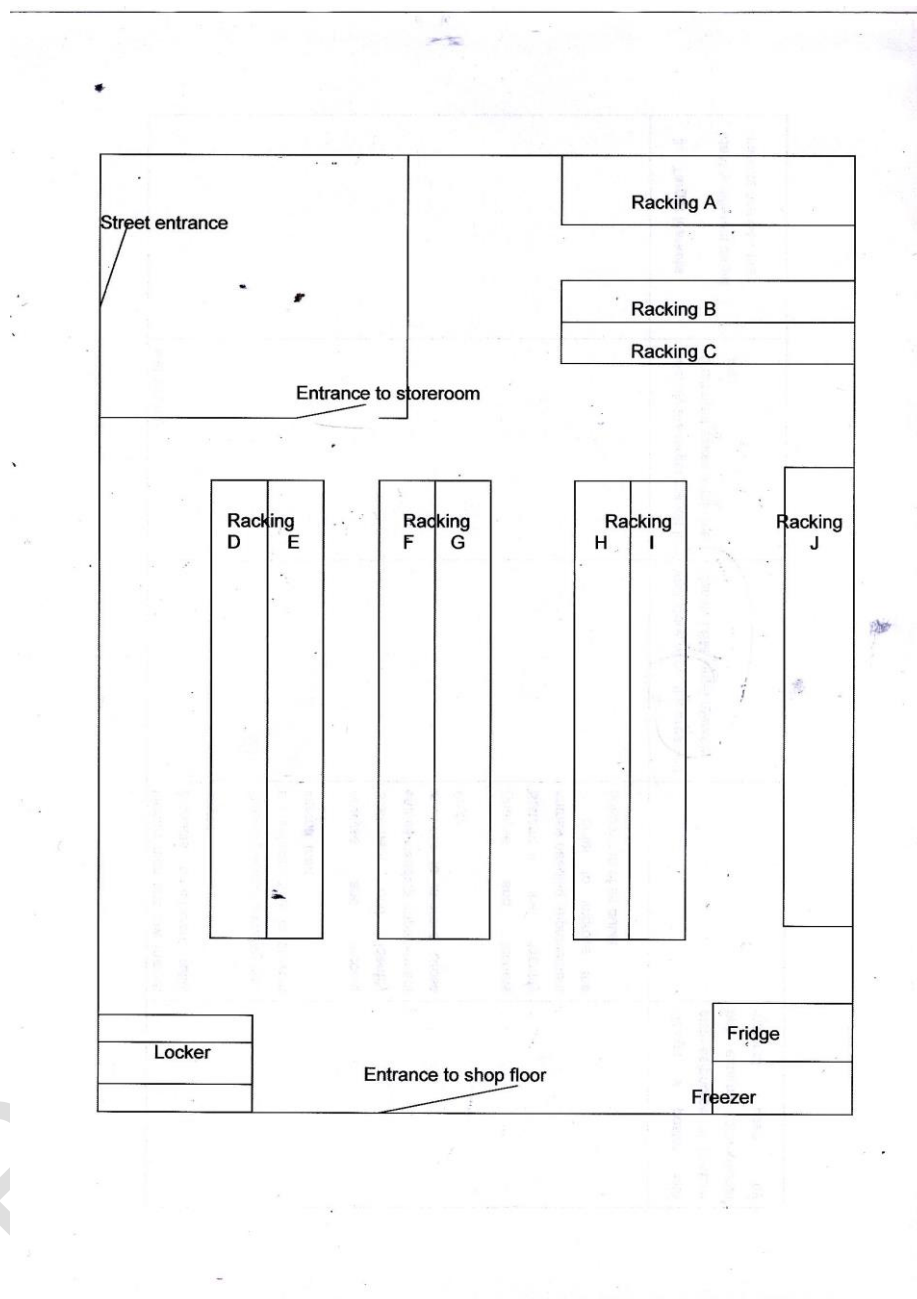
Annexure 9 (Year 3 Term 2 Week 2)

Example of a checklist that learners could use when going to stores to evaluate customer service

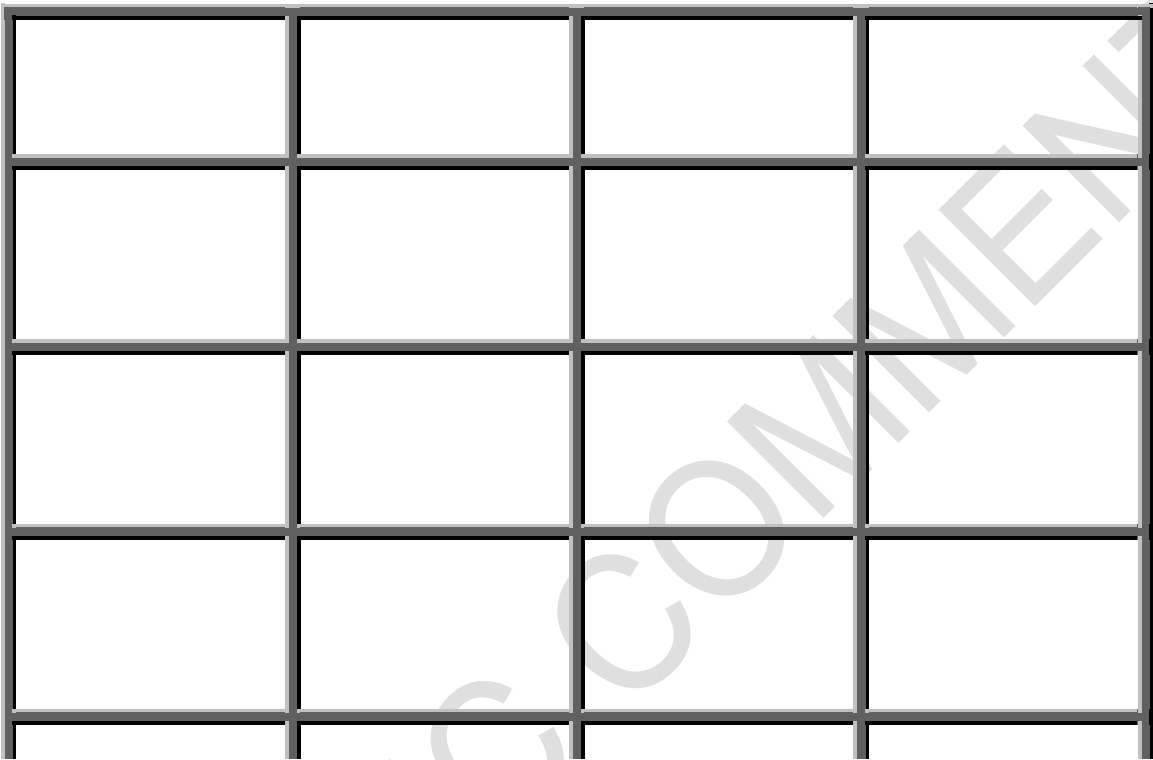
OBSERVIE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING	
1.	The staff are dressed neatly and where applicable are wearing their uniforms?
2.	The staff are wearing name badges
3.	Customers are acknowledged and greeted with a smile and with eye contact?
4.	The store is generally neat and clean?
5.	The staff approach customers to offer help without waiting for customers to approach them?
6.	Where staff are not able to answer queries they tell the customer in a polite manner that they will call for the help of someone who can?
7.	The staff talks to the customers is a pleasant voice, with a smile and eye contact?

Annexure 10 (Year 3 Term 2 Week 6)

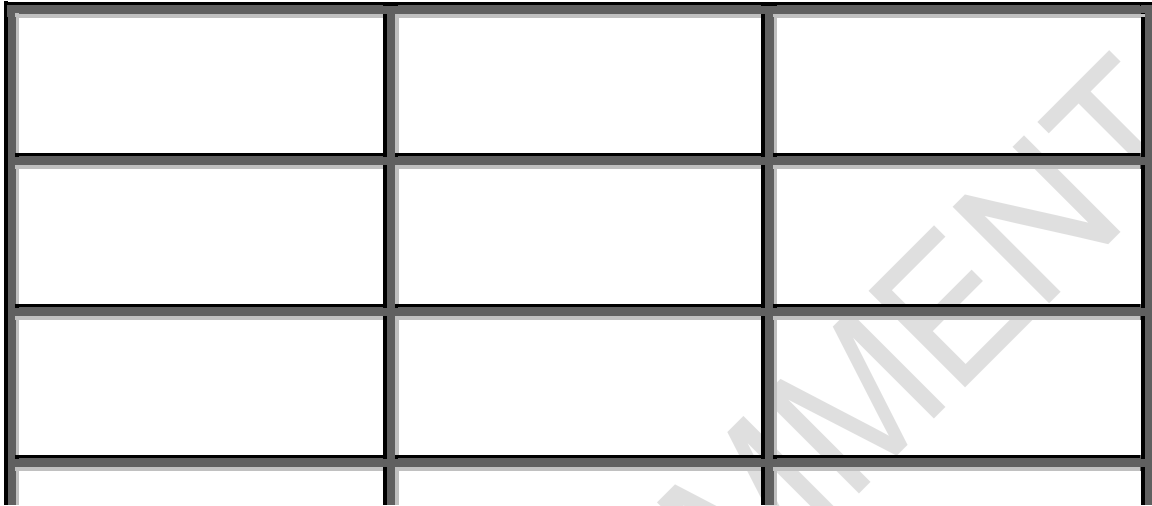
Examples of stock and racking for the exercise and ways these should be positioned in a stockroom



LOCKER RACKING



RACKING A



RACKING B



RACKING C

RACKING D

RACKING E

RACKING F

RACKING G

RACKING H

RACKING I

RACKING J

Example of a list of stock to sort into commodities and to place in the stockroom and on racking

ProNutro Whole Wheat - Original 500g	(24 in a carton)
Canine Cuisine dog food Puppy 7 kg	(singles)
Koo Baked beans 410g	(12 in a carton)
Dove Ladies deodorant Go Fresh	(12 in a shrink-wrap)
Blitz Firelights	(36 in a shrink-wrap)
Ricoffy 250g	(36 in a carton)
Bob Martins Tick & Flea collar	(singles)
Gillette blades Fusion	(144 in a carton)
Jik Bleach 750 ml	(12 in a carton)
Jungle Oatso Easy Caramel 500g	(12 in a carton)
HTH dry Chlorine for swimming pools 10 kg	(4 in a carton)
Clover Fresh Milk Full Fat 1 Lit	(24 in a crate)
Baby Soft toilet rolls 9's	(24 in a carton)
Koo Baked beans 250g	(24 in a carton)
Braai Grid	(Singles)
Shield Men's deodorant Sprint	(12 in a shrink-wrap)
Bob Martins Tick and flea powder	(singles)
Nivea Anti Age Day Cream	(Singles)
Clover Fresh Milk 2% 1 Lit	(24 in a crate)

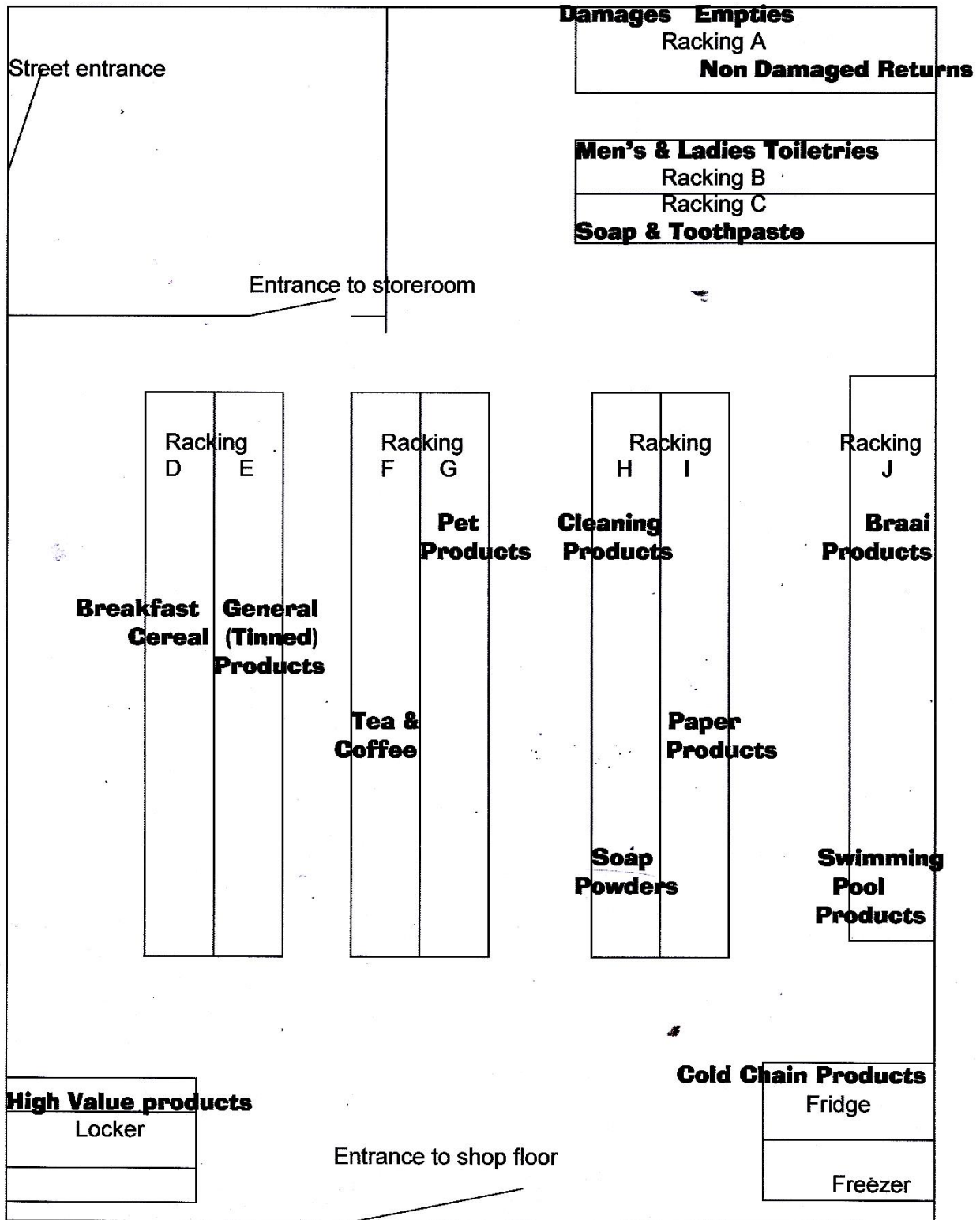
Koo Baked beans	100g	(36 in a carton)
Harpic toilet cleaner		(12 in a carton)
HTH dry Chlorine for swimming pools	6 kg	(12 in a carton)
Clover Fresh Milk Fat Free	1 Lit	(24 in a crate)
Surf	2 kg	(36 in a carton)
Lion Firelighters		(36 in a shrink-wrap)
HTH Floater+ Chlorine for swimming pools		(12 in a case)
Dove Ladies deodorant Dry		(12 in a shrink-wrap)
Gillette blades Mach 3		(144 in a carton)
Jungle Oats Original	500g	(12 in a carton)
Beano dog biscuits Bacon	1 kg	(12 in a carton)
Ricoffy	750g	(12 in a carton)
Dove soap	4's	(36 in a shrink-wrap)
Drain cleaner		(24 in a carton)
Aqueous cream soap bar		(12 in a shrink-wrap)
Darling Yogurt Vanilla	500g	(singles)
Jungle Oatso Easy Strawberry Yogurt flavour	500g	(12 in a carton)
Blank DVDs		(Singles)
Flora Margarine	500g	(48 in a carton)
Dettol Hand wash	250 ml	(24 in a carton)
Lion Matches	10's	(144 in a carton)
Lucky Star Sardines		(48 in a carton)
Jungle Oats Original	1 kg	(12 in a carton)
Rattex rat poison		(48 in a carton)
HTH Swimming pool test kit		(Singles)
Philips Electric Shaver		(Singles)
Philips Lady Shaver		(Singles)

Butter	250g	(48 in a carton)
Kellogg's Special K	300g	(24 in a carton)
Braai tongs		(12 in a carton)
Beano dog biscuits Biltong	1 kg	(12 in a carton)
Darling Yogurt mixed	6 pack	(24 in a carton)
Jungle Oatso Easy Chocolate	500g	(12 in a carton)
Chaka Charcoal		(Singles)
HTH Swimming Pool Acid liquid	5 lit	(4 in a carton)
Dettol hand wash refill	500 ml	(12 in a carton)
Black shoe polish		(36 in a carton)
Ricoffy	500g	(24 in a carton)
John West tinned Tuna fish		(36 in a carton)
Beano dog biscuits Steak	1 kg	(12 in a carton)
Brown shoe polish		(36 in a carton)
HTH Dry swimming pool acid	6 kg	(4 in a carton)
Mentodent P Toothpaste	100 ml	(72 in a carton)
Domestos Bleach	750 ml	(12 in a carton)
Lucky Star Pilchards	410g	(36 in a carton)
Beano dog biscuits Marrow Bone	1 kg	(12 in a carton)
Parmalat fat free Yogurt Assorted flavours	500 ml	(Singles)
Shield Men's deodorant Cool		(12 in a shrink-wrap)
Jik Bleach	1.5 lit	(12 in a carton)

You also have the following

- Empty cool drink bottles in crates to be returned to the suppliers
- Damaged stock to be returned to suppliers.
- Non damaged stock that suppliers have agreed to take back.

Example of the answers to this exercise



RATIONAL FOR STOCKROOM LAYOUT

- 1 Braai products with smelly items such as charcoal and fire lighters must not be put anywhere near food items.**
- 2 Swimming pool items with items such as acid and chlorine must also be kept separate from food items.**
- 3 Toiletries for the same reason to be separate and all toiletries to be grouped together**
- 4 Soap powders which are very heavy to be packed near the entrance to the shop floor.**
- 5 This also applies to paperware which is big and bulky**
- 6 Cleaning aids also to be kept separate from food items**
- 7 Tinned items may be placed behind any of these items as they will not be contaminated.**
- 8 Breakfast cereals which are in boxes and not tins to be kept far from any items that could contaminate them**
- 9 All high value items into the High Value locker area.**
- 10 All cold chain products into the fridge.**
- 11 There are no items for the freezer.**

LOCKER RACKING

Blank DVDs	Nivea Anti Age Day cream	Philips Electric Shaver	Philips Ladyshave
Gillette blades Fusion	Gillette blades Mach 3		

Heaviest items on lower shelves

Leave highest shelves empty if not required.

Items with the same brand name (Philips/Gillette) to be grouped to facilitate counting for re-ordering

RACKING A

Damages	Empty bottles	Non damaged returns
Damages	Empty bottles	Non damaged returns
Damages	Empty bottles	Non damaged returns

Damaged products must not be put next to non damaged returns as they could contaminate the items that are not damaged.

RACKING B

Shield Men's deodorant Cool Shield Men's deodorant Sprint		Dove Ladies deodorant Dry Dove Ladies deodorant Go Fresh

Keep Men's toiletries category together

Keep Ladies' toiletries category together

Keep brands together

Use easiest to access shelf where possible – in this case – the middle shelf

RACKING C

Dove soap 4's Aqueous cream soap bar	Dettol Hand wash 250 ml Dettol hand wash refill 500 ml	
Mentodent P Toothpaste 100 ml		

Heavy items (144 toothpaste) on bottom shelf

Group soaps together

Group Radox hand wash together

RACKING D

	Jungle Oats Original 500gr	
Kellogg's Special K 300g	Jungle Oats Original 1kg	Jungle Oatso Easy Chocolate 500g
ProNutro Whole Wheat Original 500g	Jungle Oatso Easy Strawberry Yogurt 500g	Jungle Oatso Easy Caramel 500g

Brands together

Heaviest items lowest shelves

RACKING E

Koo Baked beans 100g		Lucky Star Sardines
Koo Baked beans 250g		Lucky Star Pilchards 410g
Koo Baked beans 410g		John West tinned Tuna fish

Group Tinned Veg category together

Group tinned fish category together

Group Koo brand together with lightest items on top shelves

RACKING F

Ricoffy 250g		
Ricoffy 500g		
Ricoffy 750g		

Lighter items on higher shelves

RACKING G

	Beano dog biscuits Marrow Bone 1 kg	
Beano dog biscuits Steak 1 kg	Beano dog biscuits Biltong 1 kg	Bob Martins Tick and flea powder Bob Martins Tick & Flea collar
Canine Cuisine dog food Puppy 7 kg	Beano dog biscuits Bacon 1 kg	

Keep accessories separate from food

Group by brand

Heaviest items (8kg bags) lowest shelf

RACKING H

Black and brown shoe polish	Rattex rat poison	
Domestos Bleach 750 ml	Drain cleaner	
Jik Bleach 750 ml Jik Bleach 1.5 lit	Harpic toilet cleaner	Surf 2 kg

Brands together

Product type together (shoe polish together, bleach products together)

Heaviest on lowest shelves

Surf 36 kg carton (36 X 1 Kg) on lowest shelf closest to shop floor entrance

RACKING I

Baby Soft toilet rolls 9's
Baby Soft toilet rolls 16's

Group paperware together with larger size on lower shelf

RACKING J

HTH Swimming pool test kit HTH Floater+ Chlorine		Blitz Fire Lighters Lion Firelighters Matches
HTH dry Chlorine 6 kg	HTH Dry swimming pool acid 6 kg	Braai tongs Braai grid
HTH dry Chlorine 10 kg	HTH Swimming Pool Acid liquid 5 lit	Chaka charcoal

Commodities grouped (Braai and Swimming Pool products grouped by commodity)

Brands together

Heaviest on lowest shelves

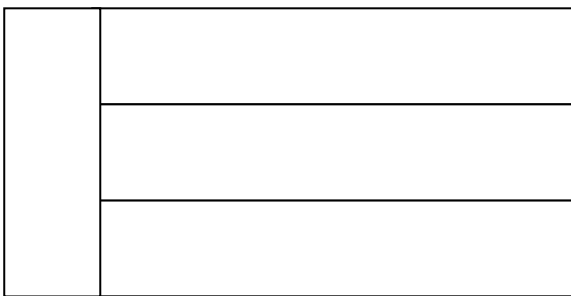
Annexure 11 (Year 3 Term 2 Week 6)

Example of how to build stacks in a stockroom

This is how you should build stacks Looking from above the stack)



The first layer

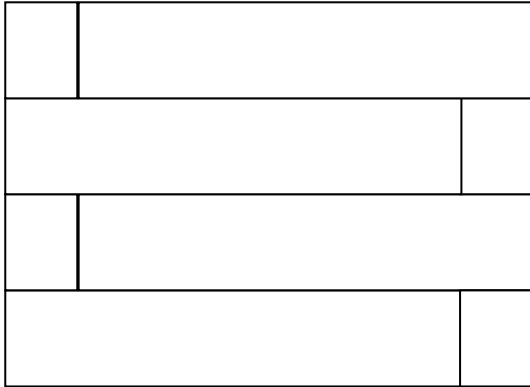


The second layer

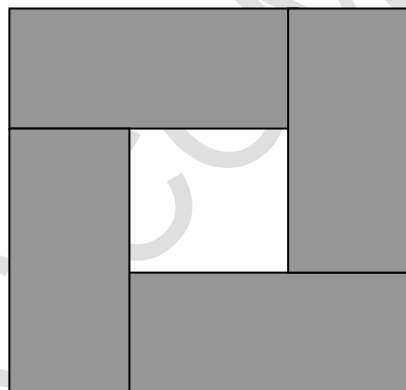


The next layer and so on

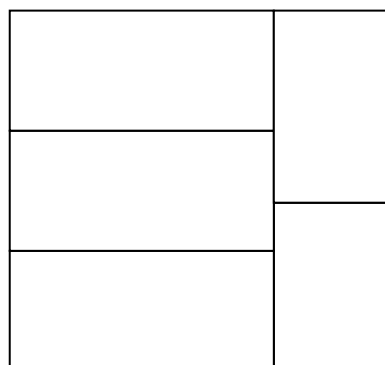
This is how it should look when standing next to it.



This is how a 4 stack should look.



This is how a 5 stack should look.



Annexure 12 (Year 3 Term 3 Week 6)

Example of a checklist that could be used to evaluate learner ability to record details when being cashed up

OBSERVE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING
1. The learner separates the float and counts it accurately?
2. Cash notes in the till are grouped by denomination, in packs of 10 with heads facing the same way?
3. All bundles of notes have paper clips in the top left corner?
4. Cash is accurately counted?
5. Other forms of tender are sorted and grouped?
6. The cash up slip is accurately completed?

Annexure 13 (Year 3 Term 4 Week 8)

Example of a checklist that could be used to evaluate learner ability to Do a layout and fill shelves

OBSERVIE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING
1. The learner uses the correct fixtures & fittings when displaying merchandise?
2. The learner displays merchandise correctly?
3. The learner handles merchandise in a way that prevents losses occurring?
4. Price labels and tickets are used according to the characteristics of the stock and the fixtures & fittings?
5. Promotional signage is put up correctly and removed in a way that minimises damage to fixtures & fittings?
6. Pricing is checked and corrective action taken where incorrect/missing labels found?
7. Displays are kept neat and full and layouts correctly maintained?
8. Layouts are changed correctly and safely?
9. Stock is rotated and damaged/out of date stock identified?

Annexure 14 (Year 4 Term 2 Week 3)

Example of a checklist that could be used to evaluate learner ability to Sell

ROLE-PLAY OBSERVATION CHECKLIST

1. Does the sales assistant approach the customer in a manner using open ended questions?
2. Does the sales assistant make the customer feel comfortable and welcome?
3. Does the sales assistant use questioning techniques that identify the customer's needs correctly?
4. Did the sales assistant match products to the customer's needs?
5. Features of the product are explained to the customer in terms of their benefit to the customer.
6. The candidate offers a linked product where applicable?
7. The customer's questions are answered in a manner that satisfies the customer?
8. Where the original product offered to the customer is not accepted, does the sales assistant offer an alternative product?
9. Buying signals are correctly identified?
10. The sales assistant closes the sale using appropriate closing techniques?
11. If after sales service applies to the product, the sales assistant explains this to the customer?

Annexure 15 (Year 4 Term 2 Week 4)

Example of an exercise on receiving and checking a delivery

Below find a list of the actual stock being brought into your receiving bay by Johnson's Wholesale Foods

On the next page find;

- **two** outstanding orders
- The delivery note from Johnson's Wholesale Foods

You must:

- Identify which order to use to accept the goods
- Then check the goods to the order and decide what to accept
- Then check the actual stock being brought through your door and identify any discrepancies.

If you do find discrepancies, complete the discrepancy note given.

These are the items they are bringing into your receiving bay.

3 case of Jungle Oats Original 500g with 24 in each case.

2 case of Lucky Star Pilchards 410g with 36 in each case

1 case of Beano dog biscuits – Bacon flavour 1 kg with 24 in the case

1 case of Beano dog biscuits – Lamb flavour 1 kg with 24 in the case

1 case of Freshpak Rooibos Teabags 20's with 72 in the case

1 case of Lucky Star Sardines – Veg Oil 410g with 36 in a case

These are the outstanding orders on Johnson's Wholesale Foods

THE PEOPLE'S STORE			
Order placed on:		Order Number 100/5278	
Johnson's wholesale foods		Order Date 11/08/2017	
Order placed by Ezra Wilson			
ITEM CODE	DESCRIPTION	SIZE	ORDERED
PS8715	Jungle Oats Original	500g	3X24
JG357	Jungle Oats Original	1 kg	2X24
QZ987	Lucky Star Pilchards	410g	1X36
FS159	Ricoffy	750g	2X12
RE369	Beano dog biscuits – Bacon flavour	1 kg	2X24

THE PEOPLE'S STORE			
Order placed on:		Order Number 100/7989	
Johnson's wholesale foods		Order Date 25/08/2017	
Order placed by Ezra Wilson			
ITEM CODE	DESCRIPTION	SIZE	ORDERED
QZ987	Lucky Star Pilchards	410g	1X36
MZ781	Lucky Star Sardines – Veg Oil	410g	1X36
PL329	ProNutro Whole Wheat Original	500g	2X72
UB487	Jungle Oatso Easy – Caramel flavour	500g	2X24
PS8715	Jungle Oats Original	500g	1X24

This is the delivery note they give you.

Johnson's Wholesale Foods		
Delivery Note No. A789258		Deliver to
THE PEOPLE'S STORE		12 Main St Shady Oaks
Your Order Number 1005278		Date 27/08/2017
ITEM CODE	DESCRIPTION	QUANTITY
PS8715	Jungle Oats Original 500g	3X24
GQ191	Freshpak Rooibos Teabags 20's	1X72
QZ987	Lucky Star Pilchards 410g	2X36
FS159	Ricoffy 750g	2X12
RE369	Beano dog biscuits – Bacon flavour 1kg	2X24
MZ781	Lucky Star Sardines – Veg Oil 410g	1X36
Delivery received by		

If you find discrepancies, complete the discrepancy note on the following page

THE PEOPLE'S STORE

Claim Number **245/9874**

Date

Claim on:

Refer to delivery note

Received on

CODE	QTY charged	Quantity received	DESCRIPTION

Completed by

Checked and agreed by supplier's agent.....

ANSWER TO RECEIVING AND CHECKING EXERCISE

This is the order against which the delivery must be accepted

THE PEOPLE'S STORE			
		Order Number 100/5278 Order Date 11/08/2017	
Order placed on: Johnsons wholesale foods			
Order placed by Ezra Wilson			
ITEM CODE	DESCRIPTION	SIZE	ORDERED
PS8715	Jungle Oats Original	500g	3X24
JG357	Jungle Oats Original	1 kg	2X24
QZ987	Lucky Star Pilchards	410g	1X36
FS159	Ricoffy	750g	2X12
RE369	Beano dog biscuits – Bacon flavour	1 kg	2X24

The learners must ignore this order

THE PEOPLE'S STORE			
		Order Number 100/7989 Order Date 25/08/2017	
Order placed on: Johnsons wholesale foods			
Order placed by Ezra Wilson			
ITEM CODE	DESCRIPTION	SIZE	ORDERED
QZ987	Lucky Star Pilchards	410g	1X36
MZ781	Lucky Star Sardines – Veg Oil	410g	1X36
PL329	ProNutro Whole Wheat Original	500g	2X72
UB487	Jungle Oatso Easy – Caramel flavour	500g	2X24
PS8715	Jungle Oats Original	500g	1X24

This is how they should have completed the delivery note.

Johnson's Wholesale Foods <div> <div>Deliver to</div> <div> THE PEOPLE'S STORE 12 Main St Shady Oaks </div> <div> Delivery Note No. A789258 Your Order Number 1005278 Date 27/08/2017 </div> </div>		
ITEM CODE	DESCRIPTION	QUANTITY
PS8715	Jungle Oats Original 500g	3X24 ✓
GQ191	Freshpak Rooibos Teabags 20's	N/R 1X72
QZ987	Lucky Star Pilchards 410g Received 1 X 36	2X36
FS159	Ricoffy 750g	N/R 2X12
RE369	Beano dog biscuits – Bacon flavour 1kg Rec 1 X 24	2X24
MZ781	Lucky Star Sardines – Veg Oil 410g	N/R 1X36
Delivery received by ... Learner signs - ...Refer claim 245/9874		

Explanation of the answer to this exercise

3 case of Jungle Oats Original 500g with 24 in each case.

- **This is correct and is the quantity both ordered and delivered so the learners must tick the delivery note**

2 case of Lucky Star Pilchards 410g with 36 in each case

- **The store only ordered 1X36 so the learner must only accept 1X36**
- **A claim must be raised for the second case the store was charged for.**

1 case of Beano dog biscuits – Bacon flavour 1 kg with 24 in the case

- **We ordered 2 X24 but they are only delivering 1X24 so the learner must note only 1X24 received on the delivery note**
- **A claim must be raised for the second case the store was charged for.**

1 case of Beano dog biscuits – Lamb flavour 1 kg with 24 in the case

- **This was not ordered so must not be accepted**
- **No claim needs to be made out as the store was not charged for this item**

1 case of Freshpak Rooibos Teabags 20's with 72 in the case

- **The store did not order this so the learner must not accept it and must show it as N/R on the delivery note.**
- **A claim must be raised for this.**

1 case of Lucky Star Sardines – Veg Oil 410g with 36 in a case

- **The store did not order this so the learner must not accept it and must show it as N/R on the delivery note.**
- **A claim must be raised for this.**

The store ordered **Ricoffy** but none were delivered and the store was charged for it.

The learner must note on the invoice N/R and claim for it.

The is how the completed discrepancy note should look

THE PEOPLE'S STORE			
			Claim Number 245/9874
			Date Date entered.
Claim on: Johnson's Wholesale Foods			
Refer to delivery note . A789258			
Received on Date entered			
CODE	QTY charged	Quantity received	DESCRIPTION
GQ191	1X72	Nil	Freshpak Rooibos Teabags 20's
QZ987	2X36	1X36	Lucky Star Pilchards 410g
RE369	2X24	1X24	Beano dog biscuits – Bacon flavour 1 kg
MZ781	1X36	Nil	Lucky Star Sardines – Veg Oil 410g
FS159	2X12	Nil	Ricoffy 750g
Completed by ... Their signature or any signature			
Checked and agreed by supplier's agent..... Any signature.			

Annexure 16 (Year 4 Term 2 Week 5)

Example of an exercise for completing of documentation for the dispatch of stock.

The owner of Fred's Convenient Superette has 2 stores one in Park St and one in West Avenue.

The Park St store has permission from Mrs Nxumalu of Jackie's Wholesale Foods to return the following goods.

- 1 only Brians Spice – Chicken 175g which is damaged
- only Brians Spice – Steak and Chop 175g which are damaged
- 1 X 24 Jones's Chunkey Chicken Noodle Soup 400g

The Park St store has also been told to inter-branch the following items to the West Avenue store.

- X 12 Jo Jo ground coffee Dark Roast 250g
- X 12 Jo Jo ground coffee Medium Roast 250g
- X 12 Jo Jo coffee beans Dark Roast 250g

Fred's Convenient Superettes do not have any computers so everything is recorded manually in a triplicate book bought at the local stationary store and just stamped with the store's name and address.

Note: The stores do not have cost prices of items. This is kept by the accounts department.

Fred's Convenient Superette

Park St

Fred's Convenient Superette

Park St

ANSWERS TO DISPATCHING EXERCISE

The completed Dispatch Note for the returns to the supplier

7
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 60%;">Fred's Convenient Superette Park St</div>
Claim for credit - Jackie's Wholesale Foods
1 only Brians Spice – Chicken 175gr
2 only Brians Spice – Steak and Chop 175gr
1 X 24 Jones's Chunkey Chicken Noodle Soup 400gr
Return authorised by Mrs Nxumalu
Returned by Any name
Received by Learner to print a name, the date and show a signature and to record a truck number

The completed Dispatch Note for the IBT

8
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 60%;">Fred's Convenient Superette Park St</div>
Inter-branch to West Avenue
2 X 12 Jo Jo ground coffee Dark Roast 250gr
3 X 12 Jo Jo ground coffee Medium Roast 250gr
2 X 12 Jo Jo coffee beans Dark Roast 250gr
Dispatched by Any Name
Received by Learner to print a name, the date and show a signature and to record a truck number

Annexure 17 (Year 4 Term 3 Week 4)

Example of an exercise to calculate the overs and shorts of a cashier.

Using the following information, cash up Susan's PoS

Opening reading R102 748 59

Closing reading R117 984.80

Uplift handed in earlier R10 750.00

Here is her cash up slip.

CASH HAND OVER CONTROL		
Date	Todays	
Name	S Nxumalu	
Employee Number	1517	
Operator Number	02	
Notes	Qty	Value
200.00	6	
100.00	25	
50.00	5	
20.00	2	
10.00		
Sub Total		
Coins		
R5.00	3	
R2.00	6	
R1.00	7	
0.50	1	
0.20	2	
0.10	1	
0.05		
Total		
Credit Cards	3	
Debit Cards	3	
Coupons	1	
Gift vouchers		
Till Over		
Till short		
Cashier Acknowledge		
Cash Office Clerk Acknowledgement		

Credit cards R79.85 R52.45 R86.89
Debit Cards R102.78, R24.39, R58.23.

COLLEGE STORES DAILY CASH TAKINGS RECONCILIATION							
Office Clerk					Date		
Cashier Name							TOTAL
Employee No							
Operator No							
Closing reading							
Opening reading							
EXPECTED TAKINGS							
Cash handed in							
Cash Drops							
TOTAL CASH							
Credit cards							
Debit cards							
Coupons							
Gift vouchers							
TOTAL TAKINGS							
Over							
Short							
Cashier signature							

CASH UP A PoS Answer to exercise.

Using the following information, cash up Susan's PoS

Opening reading R102 748 59
 Closing reading R117 984.80
 Uplift handed in earlier R10 750.00
 Here is her cash up slip.

CASH HAND OVER CONTROL		
Date	Today's	
Name	S Nxumalu	
Employee Number	1517	
Operator Number	02	
Notes	Qty	Value
200.00	6	1200
100.00	25	2500
50.00	5	250
20.00	2	40
10.00		
Sub Total		3990.00
Coins		
R5.00	3	15.00
R2.00	6	12.00
R1.00	7	7.00
0.50	1	.50
0.20	2	.20
0.10	1	.10
0.05		
Total		4024.80
Credit Cards	3	219.60
Debit Cards	3	185.40
Coupons	1	.25
Gift vouchers		
Till Over		
Till short		56.16
Cashier Acknowledge		
Cash Office Clerk Acknowledgement		

Credit cards R79.85 R52.45 R86.89

Debit Cards R102.78, R24.39, R58.23.

COLLEGE STORES DAILY CASH TAKINGS RECONCILIATION							
Office Clerk Their Name					Date Today's date		
Cashier Name	S Nxumalu						TOTAL
Employee No	1517						
Operator No	02						
Closing reading	117 984,80						
Opening reading	102 748,59						
EXPECTED TAKINGS	15 236,21						
Cash handed in	4 024.80						
Cash Drops	10 750.00						
TOTAL CASH	14 774,80						
Credit cards	219,60						
Debit cards	185,40						
Coupons	,25						
Gift vouchers							
TOTAL TAKINGS	15 180,05						
Over							
Short	56,16						
Cashier signature							

Annexure 18 (Year 3 Term 2 Week 6)

Example of a checklist that could be used to evaluate learner ability to Cash Up and Balance other tills

OBSERVE THE LEARNER AND EVALUATE PERFORMANCE OF THE FOLLOWING
1. The learner ensures the work area is cleared and gathers all the required stationary prior to starting the cash up?
2. The learner correctly identifies and records the expected takings of the Cashier?
3. The takings handed in by the Cashier is counted and checked to the Cashiers slip?
4. The takings handed in by the Cashier is correctly recorded and balanced to expected takings?
5. All non-bankables are correctly handled and put aside?
6. Overs & shorts are correctly identified?
7. The amount banked is in agreement to the amount expected to be banked as handed in by all the Cashiers?
8. All cash up documentation is correctly and accurately completed?
9. The prepared deposit and documentation meets the requirements of the bank and the cash collection guards?

Reference

“Wholesale and Retail Hands on Training” Authored by Judy Braune and Harry Bell

Retail Training Services training programs

The developers own years of experience in retail

PUBLIC COMMENT