



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

TEACHERS GUIDE

Year 1

WHOLESALE AND RETAIL

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SECTION 1:

INTRODUCTION:

1. Requirements for Wholesale and Retail as a subject

1.1. 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.

1.2. Resources

1.2.1. 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. Wholesale and retail industry related experience would be an asset. Teachers must try build a relationship with managers of both small and large Wholesale and Retail outlets in the area and regularly visit them to keep abreast with the wholesale and retail industry

If possible, teachers should ask to observe 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) fixtures and fittings and stock where there is one available.
- 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 outlets within the area. This might be able to be done through learners doing this on the own if outlets are within the area and able to be accessed through public transport otherwise the school should provide transport and arrange outings. The exposure to the retail industry through outings to retail outlets is very beneficial in strengthening the learning experience.
- 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 wholesale and retail industry
- Provide students with letters stating they are wholesale and retail students so when they visit outlets to observe they will be accepted more readily.
- Where possible and where allowed (taking into account the security requirements of businesses) learners should be encouraged to visit outlets and watch the staff at work to better understand the theory they learn in the classroom.
- In schools that have no, or limited access to computers and the internet, teachers should visit outlets and take photographs that can be used to illustrate concepts.

1.2.2. Learner Resources:

- Text/ resource book
- The internet (where available)
- Pen/pencils
- Wholesalers/retailers in the area
- Magazines.
- Newspapers
- Internet pictures or photographs taken by the teacher

2. Infrastructure, equipment and finances

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

2.1. Infrastructure

- Any school wishing to offer Wholesale and Retail as a subject should try 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 then 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.

2.2. 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

2.3. SIM room equipment

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

Equipment	Requirements
Point of Sale Equipment (Tills) Linked to a computer Back Office System	Scanning Point of Sale hardware
	Minimum of 2 per SIM room, preferably 3 (this is dependent on the numbers 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 ○ 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 both with and without bar-codes (This can be set under Supervisor level)
Shelf edge label printer	A shelf edge label printer linked to a system that allows labels to be printed 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

NOTE: If the school cannot arrange for computerised tills (PoS) then manual tills or even cash boxes can be used. As long as the learners can process sales and "handle cash and give change"

2.4. Other equipment

- Where possible, learners should have access to a computer that will allow for the design and printing of promotional tickets. (A program such as Word)
- Where this is not available learners can use paper and colored pens

2.5. 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 – Example provided)
- Poster paper/board
- Receiving and dispatch stationary (Designed by the teacher - Example provided)
- Banking stationary (Designed by the teacher and from banks)

2.6. Teacher Resources:

- Text book
- Carrier bags/Pictures of logos
- YouTube videos on the Supply Chain (where there is access to the internet)
- PowerPoint presentation to be prepared by the teacher (where there is access to computers)
- YouTube Videos on customer service (where there is access to the internet)
- YouTube videos of Inventory counting (where there is access to the internet)
- Actual products with examples of date coding/sell/use by dates
- Examples of merchandising techniques downloaded off the internet or photographs taken by the teacher
- Products with prices/product codes
- Examples of pricing/codes off the internet or photographs taken by the teacher
- 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. (where there is access to the internet)
- Pictures of money counting equipment taken off the internet. (where there is access to 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. (where there is access to the internet)

2.8. 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 (Petrol)
- Text books, Workbooks and Teachers Guide

3. Field Exercises and Report back.

Retail is a very visual industry and as such learners should visit outlets within the area to identify examples of topics learned through the week.

This might be able to be done through learners doing this on the own if outlets are within the area and learners are able to visit them using public transport.

If this is not an option, the school should provide transport and arrange outings

After field work learners are to make a presentation to the class on their finding.

A minimum of one lesson at the end of each week or the start of the next week must be devoted to the presentations where presentations are required

SECTION 2:

SPECIFIC GUIDE BY WEEK

WEEK 1

TOPIC. 1 The Wholesale and Retail Industry:

Concepts and roles

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 1	Concepts, and roles	The concept and role of Wholesale and Retailing		Learners to access the internet (where available)		Theoretical explanation Learners to access the internet (where available)	Text book Internet (where available)

ANSWERS TO STUDENT ACTIVITIES



Learners to access the internet and identify wholesalers in South Africa.

Comment on the students work in the space provided in the student's workbook

Activity 1: The concept of Wholesale and Retail

**In teams of two discuss and then in your own words explain what you understand
Retailing, Wholesaling and Distribution are.**

If a customer wants to buy products, he or she would need to get these products from a business known as a retailer

RETAIL is the sale of products or goods to customers in small amounts for their own use and consumption

The **wholesaler** buys large quantities of products from the suppliers and then breaks these large quantities into smaller packs and sells these smaller packs to retailers.

Wholesalers do not sell directly to the consumer. They sell to the retailer who then sells to the consumer

Distribution is the process of moving products from the manufacturing source to the consumer.

WEEK 2

TOPIC. 2 The Wholesale and Retail Industry:
Categories

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 2	Categories	Categories of Retailers		Field exercises interviews Presentation		Theoretical explanation Field exercises Interviews Presentation	Text book



FIELD WORK/INTERVIEWS

Identify retail examples of each category in your local area.

Learners to correctly identify examples of each category in the area

FIELD WORK/INTERVIEWS

Visit a supermarket and note the different departments available.

Learners to correctly identify the different departments on display in a local supermarket

WEEK 3

TOPIC. 3 The Wholesale and Retail Industry:

The role of small and large retailers

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 3	Roles of small and large retailers	The role of small retailers The role of large retailers		Verbal or written explanation		Theoretical explanation Verbal or written explanation	Text book

Activity 2: The role of small and large retailers

In your own words explain the role of small and large retailers.

The major chains such as Clicks, Shoprite, and Woolworths etc. are ideal for the consumer to visit a few times a month to buy their weekly or monthly needs.

The small retailer such as the 24-hour convenience outlet at the petrol stations, KWIKSPAR and the speciality outlet such as little cosmetic outlets and clothing boutiques also have a role.

The convenience outlet is ideal for when the consumer suddenly finds himself short of something he needs in a hurry.

The boutiques whether selling glassware or clothing also have a role in the economy. They appeal not so much to the **mass market** but rather to a smaller, more **exclusive** customer who wishes to purchase something special that is not available everywhere else.

Outlets that attract the **mass market shopper**, attract large quantities of shoppers who don't mind buying the same products as other shoppers.

The **exclusive shopper** has the opposite need. They want something special and unique that others don't have and are happy to pay more for it so they shop for those products at a small independent outlet.

WEEK 4 & 5

TOPIC. 4 The Wholesale and Retail Industry:

Sub sectors of retailers

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 4 & 5	Sub sectors of retailers	Sub sector of the industry		Draw a poster that displays pictures or logos of businesses that fall into each sub sector of the industry		Theoretical explanation	Text book Carrier bags/Pictures of logos Outlets within the area Poster board

ANSWERS TO STUDENT ACTIVITIES

Activity 3: Furniture Sub-Sector

List 2 outlets that you know fall into this sub-sector or research the names of 2 furniture outlets.

Any furniture outlets such as Lewis Stores, Russels etc

Activity 4: CFTA Sub-Sector

List 2 outlets that you know fall into this sub-sector or research the names of 2 CFTA outlets.

Any clothing or shoe shops (or CFTA outlets) such as Foschini, Truworths etc

Activity 5: FOOD Sub-Sector

List 2 outlets that you know fall into this sub-sector or research the names of 2 food outlets.

Any food outlets such as Shoprite, Pick 'n Pay, Spar etc

NOT Take Away food outlets

Activity 6: SPECIALITY Sub-Sector

List 2 outlets that you know fall into this sub-sector or research the names of 2 SPECIALITY.

Any music outlets, gift outlets etc. In fact any outlet that does not fall into food, CFTA or furniture

Activity 7: MULTI Sub-Sector

In teams of two, discuss into which sub-sector you think the following retailers that sell a mix of good can be categorised.

Clicks

Speciality

Woolworths

Clothing

Pick 'n Pay Hypermarket

Food



Students to design a poster that displays pictures or logos of businesses that fall into each sub sector and category of the industry .

Sub-Sectors and Categories	Completed correctly	Not correctly completed
Correctly identifies a business that falls within the following sub-sectors:		
Furniture		
CFTA (Clothing, Footwear, Textiles & Accessories)		
Food		
Speciality		
Fuel		
Correctly identifies a business that falls within the following categories:		
Groups or Chains		
Independents		
Small. Micro. Enterprises		
Discounters		
Convenience Outlets		

WEEK 6 & 7

TOPIC. 5 Profit:

Concept and importance and calculation of profit.

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 4	Concept and importance of profit. Terms used on an Income Statement	What profit is and why it is important The term Top line The term Bottom line Introduction to Income statement Explanation of all terms on the income statement				Theoretical explanation	Text book

ANSWERS TO STUDENT ACTIVITIES

Activity 8: Profit

How would you describe profit?

Profit is the difference between what you buy something for and what you finally sell it for.

An answer that relates to the above

Activity 9: The importance of profit

In teams of two discuss what why you think it is important for a business to make a profit.

The main purpose of any business is to make a profit. This means that the business makes enough money to pay everyone that is involved and there is still money left over to reward owners to share in the profits.

If a business is not profitable, it will have to close its doors.

An answer that relates to the above

Activity 10: Operating expenses

In teams of two list 4 expenses you think a business will have to pay each month

Any practical expense such as;

Salaries, wages, overtime, Advertising, Bank charges, Cleaning, Computer licence fees, Electricity, Insurance, Motor vehicle expenses, Packaging & wrapping, Printing & stationery, Rates, Rent, Refuse collection, Repairs – building, Repairs – equipment, Security, Telephone

Activity 11: Terms on the Income Statement In your own words explain the following terms	
Actual sales	This is the figure for all the actual sales recorded at the Point of Sale
Cost of goods sold	This is the total of the cost of the goods that have been sold over this period
Shrinkage and losses	This is all known and unknown losses the outlet suffered
Gross profit	This is the profit calculated by deducting the cost of the goods sold and shrinkage from the actual sales
Other income	This is income from sources other than actual sales of good. An example would be the sale of old fixtures and fittings or motor cars
Expenses	This is all costs involved in running the business
Net profit before interest	The Gross Profit plus Other Income (if there is) less expenses
Interest	Interest either paid to the bank for a loan/overdraft or received from the bank for money the business has on deposit
Net profit before tax	As it says.
Tax	The tax the business pays to the government on the profits of the business

Net profit after tax	As it says
Dividend	The portion of the Net Profit after Tax that is paid to the shareholders
Retained income	The portion of the Net Profit after Tax that is kept by the business to make improvements to the business.

WEEK 8

TOPIC. 6 Target Market:

Introduction.

Insert date	Topic(s)	Theory	Date completed	Practical	Date completed	Activities	Resources
Week 8	Introduction to target market:	Different target markets Income Product		Field work (where possible) Presentation		Theoretical explanation Field work (where possible) Learner's to make a presentation.	Text book PowerPoint presentation Outlets within the area (where possible)

Activity 12: Target Market

In your own words describe what 'Target Market' is.

Target Market is the word given to describe a group or type of customers that a business wants to attract

These are the people who will most likely to want to buy the company's products and use their services.

Activity 13: How will your product be affected by your target market?

In your teams of two explain how different target markets affect a business's product range.

Students can use any examples of the different target markets but must show through the examples they give that they understand how products will change according to the target market they give and should correctly match products to the examples they give



FIELD WORK

Identify the target market for 5 different outlets within the area

Outlet	Target Market

Comment on the students work in the space provided in the student's workbook

SECTION 4:

ASSESSMENT

4.1 Assessment

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

The GETC: Skills and Vocational Qualification at NQF Level 1 is a four-year Learning Programme. In year one a learner is exposed to a number of Vocational 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%

4.2 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: 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 Produce a poster	Practical Project	25%	FAT 1
		Activity 2 Calculation exercise	Practical exercise	50%	
		Activity 3 Respond to questions	Pen and paper test (Oral or written)	25%	