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PART 5 OF 5



AIDS HELPLINE: 0800-0123-22 Prevention is the cure

Category	NLRD No.	Unit Standard Title	Level	Credits
CORE	PP4.2	Identify, gather & act on financial information in a real estate business	4	6
	PP4.4	Identify & apply basic property principles in real estate practice	4	8
	SH08	Manage vacancy and occupancy rates in social housing	6	12
	SH07	Plan, design and manage a maintenance programme for social housing	6	12
ELECTIVE	PP4.10	Identify and coordinate facilities management opportunities	4	5

15. Integrated assessment:

Assessment should be in accordance with the following general and specific principles:

- The initial assessment activities should focus on gathering evidence in terms of the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Where assessment at title level is unmanageable, then the assessment can focus on each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.
- Evidence must be gathered across the entire range specified in each unit standard, as applicable. Assessment activities should be as close to the real performance as possible, and where simulations or role-plays are used, there should be supporting evidence to prove that the candidate is able to perform in the real situation.
- All assessments should be conducted in accordance with the following universally accepted principles of assessment:
 - use appropriate, fair and manageable methods that are integrated into real work-related or learning situations;
 - judge evidence on the basis of its validity, currency, authenticity and sufficiency; and
 - ensure assessment processes are systematic, open and consistent.

16. Recognition of prior learning:

This qualification can be achieved wholly or in part through recognition of prior learning in terms of the defined exit level outcomes and/or individual unit standards.

Evidence can be presented in various ways, including international and/or previous local qualifications, products, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records.

All such evidence will be judged in accordance with the general principles of assessment described above and the requirements for integrated assessment.

17. Articulation possibilities:

This qualification would articulate with the proposed Certificate Social Housing Property Development, and *vice versa*, as well as provide articulation possibilities with the registered qualifications in the sub-field of Real Estate.

18. International comparability:

International qualifications were examined to ensure the qualifications model and unit standards proposed are comparable in terms of qualifications levels, scope of coverage and competencies covered.

Qualifications from the following countries and sites were researched:

- Australia (National Training Information Service)
- UK (Chartered Institute of Housing, City and Guilds)
- New Zealand (National Qualifications Framework)
- Canada (Department of Human Resources and Skills Development)
- Holland
- Sweden
- Norway

The latter four (Canada, Holland, Sweden and Norway) were included in the research because they have active social housing movements and useful exchanges have already taken place between those countries and South Africa. However, no useful material could be found from any of them.

Holland: Investigations conducted through Dutch social housing technical experts currently in South Africa revealed that Holland does not have an NQF type structure, so a sector-based qualification system has been considered for social housing. At present this has not materialised. Some ad hoc or short courses in social housing were found. The most promising of these was described in Dutch, which made interpretation difficult, but it appears that many of the topics covered by this qualification are also covered, interestingly, with a task orientation similar to ours. Some university-based courses in urban renewal or urban development are available, but these are not considered relevant to the present discussion.

Sweden: In Sweden, the only qualifications for social housing that could be found related to trades in construction. These were not considered relevant to the present study.

Norway: No sector-wide or even national qualifications were found for social housing, except some relating to construction.

New Zealand: Although New Zealand has an NQF very similar to ours, nothing on social housing could be found. The closest was several unit standards from the field Family, community and social studies, for example a level 2 unit "Complete a study of societal influences on housing". This is not related to social housing.

This leaves the results from Australia and the UK that provided useful comparisons.

Australia: The National Training Information Service of the National Australian Training Authority revealed that there are three national qualifications in social housing. These are:

- CHC30702 Certificate III in Social Housing
- CHC40802 Certificate IV in Social Housing
- CHC50602 Diploma of Social Housing

The first is introductory and is aimed at the admin assistant level. It focuses mostly on the social issues rather than any technical or maintenance issues. The Level IV certificate is intended for housing officers. It includes some management training, but is primarily for leasing and tenancy management functions. The Diploma of Social Housing is management oriented, and seems focused on middle to senior management who require a general understanding of social housing rather than a more task-oriented focus.

Overall these Australian qualifications are similar in style and coverage to this qualification in social housing. They have fewer core unit standards and more electives, and they are more generic than this qualification, which is more task-oriented. Given the emerging nature of the social housing sector in South Africa and its skills base, this greater task-orientation is to be expected and is considered appropriate.

United Kingdom: The Chartered Institute of Housing is the primary agency for training in social housing. The qualifications obtained through the CIH are:

- Level 2 Certificate in Housing – very basic, not much practical. Aimed at volunteer/intro level
- Level 3 Certificate in Housing – for those who are more directly or actively involved in social housing, has an academic slant and is not very applied.
- Level 3 National Certificate in Tenant Participation and Neighbourhood Renewal
- Level 4 Certificate/Diploma in Housing
- Professional qualifications – these are courses that can be taken at undergraduate level or at postgraduate level, either to re-orientate another degree course towards housing, or to extend an existing housing degree course.

In all cases these courses have both an academic and a practical component. The academic component of each seems to have preceded the practical, with the result that the qualifications have a theoretical emphasis, and are generalist in nature. The practical components of the qualifications were only recently developed and, as with the Australian qualifications, are more general and less task-oriented than ours. The tendency is also to cover issues of relevance to the sector as a whole rather than at the organisational level. This may be a direction we in South Africa will have to pursue later, but our present need is for more on the job and focused training. For this reason, while the levels of the UK qualifications at UK level 4 are comparable to this qualifications, the latter is considered more appropriate for our present needs.

19. Accreditation and Moderation:

- Providers offering learning towards this qualification or the component unit standards must be accredited by the relevant ETQA.
- Moderation of assessment will be overseen by the relevant ETQA according to moderation principles and the agreed ETQA procedures.

20. Registration of assessors:

Assessors must be registered in terms of the requirements of SAQA and the relevant ETQA.

21. Critical cross-field outcomes:

This qualification addresses the following critical cross-field outcomes, as detailed in the associated unit standards:

- a) Identifying and solving problems in which responses indicate that responsible decisions using critical and creative thinking have been made.
- b) Working effectively with others as a member of a team, group, organisation or community.
- c) Organising and managing oneself and one's activities responsibly and effectively.
- d) Collecting, analysing, organising and critically evaluating information.
- e) Communicating effectively using visual, mathematical and/or language skills in the modes of oral/written persuasion.
- f) Using science and technology effectively and critically, showing responsibility towards the environment and health of others.

- g) Demonstrating and understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

Learning programmes directed towards this qualification will also contribute to the full personal development of each learner and the social and economic development of the society at large, by making individuals aware of the importance of:

- 1) Reflecting on and exploring a variety of strategies to learn more effectively.
- 2) Participating as responsible citizens in the life of local, national and global communities.
- 3) Being culturally and aesthetically sensitive across a range of social contexts.
- 4) Exploring education and career opportunities; and developing entrepreneurial opportunities.

**National Certificate in Social Housing Property Development**

1. **Registration number:** (to be allocated by SAQA)
2. **Field:** Services
3. **Sub- field:** Cleaning, Domestic, Hiring, Property and Rescue
4. **Level:** 6
5. **Credits:** 147 (minimum)
6. **Issue date:**
7. **Review date:**
8. **Rationale for the qualification:**

Through the Bill of Rights enshrined in Chapter 2 of the Constitution of the Republic of South Africa, 1996, every citizen of South Africa has in terms of Article 26(1) the right to have access to adequate housing. Furthermore, Article 26(2) of the Constitution requires that "... the state must take reasonable legislative and other measures, within its available resources, to achieve the progressive realisation of this right."

Since its inauguration in 1994, the South African government has launched a series of housing delivery programmes, based on the Housing Act (Act 107 Of 1997), to meet its obligations in terms of Article 26(2) of the Constitution. One of these, the Social Housing Programme, makes provision for the establishment of independent organisations (such as social housing institutions or social housing co-operatives) to be responsible for the development and management of subsidised social housing projects.

This qualification supports the objectives of the National Qualifications Framework in that it gives learners access to a management level qualification for social housing practitioners working to provide affordable housing to low and middle income groups.

9. **Purpose of the qualification:**

This is a management level qualification for any individual who is, or wishes to be, involved in the field of social housing practices. The individual may have had no previous exposure to this field or may have been practising within the field, but without formal recognition.

In particular, this qualification is intended for persons who are responsible to manage the development of social housing property.

Holders of this qualification will be able to:

- interpret and apply social housing principles to the development of social housing property
- apply generic and project management principles and techniques to the development of social housing property

- apply human resource management principles and methods in the context of social housing property development
- interpret and apply social housing property development principles and processes
- identify and manage risk factors associated with social housing development
- ensure compliance with all legal requirements relevant to the development of social housing property.

10. Access to the qualification:

Access to this qualification is open, permitting a learner to enter a learning programme for the qualification as a whole, or to enter a skills programme for individual unit standards to obtain the credits issued against these unit standards. Recognition of prior learning processes may be applied in determining readiness to enter the programme, especially regarding the learning assumed to be in place.

11. Learning assumed to be in place

It is assumed that persons starting to learn towards this qualification hold a Further Education and Training Certificate or equivalent.

It is further assumed that the learner is able to:

- interpret basic financial statements (unit standard 10388)
- contract service provider (unit standard 14552)
- demonstrate basic understanding of the primary labour legislation that impacts on a business (unit standard 13952).

12. Structure of the qualification:

The qualification has the following general structure:

The rationale and purpose provides, among other things, a broad description of what holders of the qualification can do.

The qualification is further defined by means of a number of Exit Level Outcomes (ELOs) (see section 13 below). These ELOs provide a means for candidates to exit the qualification with recognition for clusters of competencies, even if they do not achieve the whole qualification. The ELOs also provide a means to organise the unit standards into coherent clusters, thus facilitating integrated assessment.

Qualification Rationale and Purpose		
ELO 1	ELO 2	ELO 3 etc

Each ELO is further defined by means of the associated unit standards. Some of these unit standards may be indicated as CORE (compulsory), while others may be identified as ELECTIVES, with rules of combination provided.

Assessment criteria are provided for each ELO where required, mainly to address the need for evidence of integration of competencies.

Each unit standard contains details of specific outcomes, range statements and assessment criteria, thus making it possible for assessors to judge competence in terms of each unit standard, while at the same time providing possible evidence of integration of competencies.

US (C)	US (E)	US (E)	US (C)	US (E)	US (C)	US (C)	US (E)	US (E)
<p>For each unit standard:</p> <p>specific outcomes range statements assessment criteria</p>								

The unit standards as learning components of the qualification and their rules of combination are described in section 14 below.

13. Exit level outcomes, possible credits and associated assessment criteria:

The table below summarises the required exit level outcomes and links them to the total number of credits of the unit standards associated with each outcome.

Exit Level Outcome		Possible credits		
		F	C	E
1.	Interpret and apply social housing principles to the development of social housing property	12		
2.	Apply generic and project management principles and techniques to the development of social housing property		20	4
3.	Apply human resource management principles and methods in the context of social housing property development property management		14	12
4.	Interpret and apply social housing property development principles and processes		79	5
5.	Identify and manage risk factors associated with social housing development		5	
6.	Ensure compliance with all legal requirements relevant to the development of social housing property		9	8
TOTALS		12	127	29
Minimum credits required		12	127	8
TOTAL CREDITS		147		

* **Note:** F = Fundamentals; C = Core; E = Elective

Note on unit standard numbers: Where available, the identity numbers with which unit standard are registered on the National Learner Record Database are used. In addition, provisional numbers (e.g. Rec5.06, etc.), with which the SGB Real Estate has submitted unit standards for proposed qualifications in Real Estate, and provisional numbers for proposed new unit standards submitted with this qualification (SH01, etc.) are used

Exit level outcomes and associated assessment criteria:

1. Interpret and apply social housing principles to the development of social housing property

Associated assessment criteria

- 1.1. The documented evidence provided for unit standards SH01 and 14524 is reviewed.
- 1.2. The ability to integrate the competencies acquired in the above unit standards is demonstrated in a case study
2. Apply generic and project management principles and techniques to the development of social housing property

Associated assessment criteria

- 2.1. Generic and project management principles and techniques are applied across the full range of social housing property functions (see also the assessment criteria for unit standards, 14524, Rec 5.14, Rec 5.16, 15140, 15150, 13104, SH19, 7880 and SH20)
3. Apply human resource management principles and methods in the context of social housing property development

Associated assessment criteria

- 3.1. Principles and methods for effective development of social housing property development teams (internal and external) are identified and explained
- 3.2. Measurable performance management targets for social housing property development teams are identified and set
4. Interpret and apply social housing property development principles and processes

Associated assessment criteria

- 4.1. The evidence provided for unit standards 14524, Rec 5.14, Rec 5.16, 15140, 15150, 13106, 13104, SH19 is reviewed
- 4.2. The ability to integrate the competencies acquired in the above unit standards is demonstrated in a case study
5. Identify and manage risk factors associated with social housing development

Associated assessment criteria

- 5.1. The evidence provided for unit standards 13104 and 13107 is sufficient
6. Ensure compliance with all legal requirements relevant to the development of social housing property

Associated assessment criteria

- 6.1. The evidence provided for unit standards SH01, 14524, Rec 5.06, Rec 5.14, Rec 5.16, 13106, 13104, 13107 and SH19 is reviewed
- 6.2. The ability to integrate the competencies acquired in the above unit standards is demonstrated in a case study

For award of the *whole* qualification, candidates must achieve the required number of credits as specified in the rules of combination in section 14 below, as well as the criteria specified for integrated assessment in section 15 below.

Should candidates exit the qualification *without completing the whole qualification*, recognition may be given for each exit level outcome achieved. For award of a particular exit level outcome, candidates must achieve:

- all the core and elective unit standards associated with the particular exit level outcome as per the specifications contained within each unit standard, and
- the criteria specified for integrated assessment in item 15 below.

14. Learning components and rules of combination:

Credit composition per unit standard category and NQF Level

	Level 4	Level 5	Level 6	Totals
Fundamental			12	12
Core		66	61	127
Elective	8	21		At least 8
TOTALS	8	87	73	At least 147

The following depicts the rules of combination for this qualification:

Fundamental:	The unit standard listed as fundamental below with credit value of 12 is compulsory
Core:	All unit standards listed in the core section, totalling 127 credits, are compulsory.
Elective:	Unit standards with a total credit value of 29 are listed in this category below. The learner is required to select unit standards totalling at least 8 credits from the list of elective unit standards, in order to achieve at least 147 credits.

Note: The above rules of combination ensure that a minimum of 73 credits (12 Fundamental + 61 Core) are achieved at level 6, thus meeting the NSB Regulations, 1998, requirement for a Level 6 Certificate.

The table below lists the unit standards associated with each exit level outcome.

Category	NLRD No.	Unit Standard Title	Level	Credits
FUNDAMENTAL				
Exit Level Outcome 1: Interpret and apply social housing principles to the development of social housing property				
FUNDAMENTAL	SH01	Explain and evaluate social housing concepts, principles and processes	6	12
CORE & ELECTIVE				
Exit Level Outcome 2: Apply generic and project management principles and techniques to the development of social housing property				
CORE	14524	Demonstrate knowledge and insight into property as an investment	5	3
	7880	Prepare, implement, manage and control budgets	6	10
	SH20	Structure a property finance solution to meet a business need	6	16
ELECTIVE	8648	Demonstrate an understanding of professional values and ethics	5	4
Exit Level Outcome 3: Apply human resource management principles and methods in the context of social housing property development				
CORE	10147	Supervise a project team of a technical project to deliver project objectives	5	14
ELECTIVE	9224	Implement policies regarding HIV/AIDS in the workplace	5	4
	14214	Evaluate and improve the project team's performance	5	8
Exit Level Outcome 4: Interpret and apply social housing property development principles and processes				
CORE	Rec5.06	Implement and maintain legal requirements within a real estate business	5	8
	Rec5.14	Perform valuations of income producing properties	5	12
	Rec5.16	Perform valuations of vacant land	5	12
	15140	Understand and apply building construction methods	5	10
	15150	Understand and apply principles relating to the installation of services in building	5	7
	13106	Determine capital investment appraisal	6	10
	13104	Determine the relationship between risk and return	6	8
	SH19	Manage the development of social housing stock	6	12
ELECTIVE	Rec5.02	Collate, interpret and utilise financial information in a real estate business	5	5
Exit Level Outcome 5: Identify and manage risk factors associated with social housing development				
CORE	13107	Develop understanding within an organisation about the risks associated with	6	5

Category	NLRD No.	Unit Standard Title	Level	Credits
		its functioning and contexts		
Exit Level Outcome 6: Ensure compliance with all legal requirements relevant to the development of social housing property				
CORE		See unit standards SH01, 14524, Rec 5.06, Rec 5.14, Rec 5.16, 13106, 13104, 13107 and SH19 above		
ELECTIVE	13952	Demonstrate basic understanding of the primary labour legislation that impacts on a business	4	8

15. Integrated assessment:

Assessment should be in accordance with the following general and specific principles:

- The initial assessment activities should focus on gathering evidence in terms of the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Where assessment at title level is unmanageable, then the assessment can focus on each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.
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17. Articulation possibilities:

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18. International comparability:

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- Professional qualifications – these are courses that can be taken at undergraduate level or at postgraduate level, either to re-orientate another degree course towards housing, or to extend an existing housing degree course.

In all cases these courses have both an academic and a practical component. The academic component of each seems to have preceded the practical, with the result that the qualifications have a theoretical emphasis, and are generalist in nature. The practical components of the qualifications were only recently developed and, as with the Australian qualifications, are more general and less task-oriented than ours. The tendency is also to cover issues of relevance to the sector as a whole rather than at the organisational level. This may be a direction we in South Africa will have to pursue later, but our present need is for more on the job and focused training. For this reason, while the levels of the UK qualifications at UK level 4 are comparable to this qualification, the latter is considered more appropriate for our present needs.

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- Moderation of assessment will be overseen by the relevant ETQA according to moderation principles and the agreed ETQA procedures.

20. Registration of assessors:

Assessors must be registered in terms of the requirements of SAQA and the relevant ETQA.

21. Critical cross-field outcomes:

This qualification addresses the following critical cross-field outcomes, as detailed in the associated unit standards:

- a) Identifying and solving problems in which responses indicate that responsible decisions using critical and creative thinking have been made.
- b) Working effectively with others as a member of a team, group, organisation or community.
- c) Organising and managing oneself and one's activities responsibly and effectively.
- d) Collecting, analysing, organising and critically evaluating information.
- e) Communicating effectively using visual, mathematical and/or language skills in the modes of oral/written persuasion.

- f) Using science and technology effectively and critically, showing responsibility towards the environment and health of others.
- g) Demonstrating and understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

Learning programmes directed towards this qualification will also contribute to the full personal development of each learner and the social and economic development of the society at large, by making individuals aware of the importance of:

- 1) Reflecting on and exploring a variety of strategies to learn more effectively.
- 2) Participating as responsible citizens in the life of local, national and global communities.
- 3) Being culturally and aesthetically sensitive across a range of social contexts.
- 4) Exploring education and career opportunities; and developing entrepreneurial opportunities.



National Certificate in Social Housing Supervision

1. **Registration number:** (to be allocated by SAQA)
2. **Field:** Services
3. **Sub-field:** Cleaning, Domestic, Hiring, Property and Rescue
4. **Level:** 4
5. **Credits:** 135 (minimum)
6. **Issue date:**
7. **Review date:**
8. **Rationale for the qualification:**

Through the Bill of Rights enshrined in Chapter 2 of the Constitution of the Republic of South Africa, 1996, every citizen of South Africa has in terms of Article 26(1) the right to have access to adequate housing. Furthermore, Article 26(2) of the Constitution requires that "... the state must take reasonable legislative and other measures, within its available resources, to achieve the progressive realisation of this right."

Since its inauguration in 1994, the South African government has launched a series of housing delivery programmes, based on the Housing Act (Act 107 Of 1997), to meet its obligations in terms of Article 26(2) of the Constitution. One of these, the Social Housing Programme, makes provision for the establishment of independent organisations (such as social housing institutions or social housing co-operatives) to be responsible for the development and management of subsidised social housing projects.

This qualification supports the objectives of the National Qualifications Framework in that it gives learners access at entry level to a series of qualifications for social housing practitioners working at the coalface to provide affordable housing to low and middle income groups.

9. **Purpose of the qualification:**

This is an entry-level qualification for any individual who is, or wishes to be, involved in the field of social housing practices. The individual may have had no previous exposure to this field or may have been practising within the field, but without formal recognition.

In particular, this qualification is intended for persons who have first-line responsibilities towards residents of social housing projects, such as social housing supervisors.

Holders of this qualification will be able to:

- interpret the basic principles of social housing within the context of a specific social housing organisation
- assist at a first line level in the business administration elements of social housing
- manage the social dynamics resident communication within a social housing project

- coordinate first line maintenance of a social housing property
- apply basic management principles and skills in a social housing context
- assist in maintaining the financial sustainability of a social housing organisation.

10. Access to the qualification:

Access to this qualification is open, permitting a learner to enter a learning programme for the qualification as a whole, or to enter a skills programme for individual unit standards to obtain the credits issued against these unit standards. Recognition of prior learning processes may be applied in determining readiness to enter the programme, especially regarding the learning assumed to be in place.

11. Learning assumed to be in place

It is assumed that people starting to learn towards this qualification hold a Further Education and Training Certificate or equivalent.

12. Structure of the qualification:

The qualification has the following general structure:

The rationale and purpose provides, among other things, a broad description of what holders of the qualification can do.

The qualification is further defined by means of a number of exit level outcomes (ELOs) (see section 13 below). These ELOs provide a means for candidates to exit the qualification with recognition for clusters of competencies, even if they do not achieve the whole qualification. The ELOs also provide a means to organise the unit standards into coherent clusters, thus facilitating integrated assessment.

Each ELO is further defined by means of the associated unit standards. Some of these unit standards may be indicated as CORE (compulsory), while others may be identified as ELECTIVES, with *rules of combination* provided.

Assessment criteria are provided for each ELO where required, mainly to address the need for evidence of integration of competencies.

Qualification Rationale and Purpose								
ELO 1			ELO 2		ELO 3 etc			
US (C)	US (E)	US (E)	US (C)	US (E)	US (C)	US (C)	US (E)	US (E)

Each unit standard contains details of specific outcomes, range statements and assessment criteria, thus making it possible for assessors to judge competence in terms of each unit standard, while at the same time providing possible evidence of integration of competencies.

For each unit standard:

**specific outcomes
range statements
assessment criteria**

The unit standards as learning components of the qualification and their rules of combination are described in section 14 below.

13. Exit level outcomes, possible credits and associated assessment criteria:

The table below summarises the required exit level outcomes and links them to the total number of credits of the unit standards associated with each outcome.

Exit Level Outcome	Possible credits		
	F*	C*	E*
1. Communicate in a variety of ways in social housing contexts	20		
2. Use mathematics in real life and social housing contexts	16		
3. Apply basic social housing principles to the supervision of social housing property		13	7
4. Assist at a first line level in the business administration elements of social housing		15	
5. Manage the social dynamics, access and resident communication within a social housing property		20	39
6. Coordinate first line maintenance of a social housing property		12	16
7. Apply basic management principles and skills in a social housing context		25	47
8. Assist in maintaining the financial sustainability of a social housing institution		3	
TOTALS	36	82	115
Credits required	36	82	17
TOTAL CREDITS REQUIRED	135		

* **Note:** F = Fundamentals; C = Core; E = Elective

Note on unit standard numbers: Where available, the identity numbers with which unit standard are registered on the National Learner Record Database are used. In addition, a provisional number (PP4.10) with which the SGB Real Estate submitted a unit standards for the proposed *Further Education and Training Certificate: Real Estate - NQF Level 4* and provisional numbers for proposed new unit standards submitted with this qualification (SH10, SHF11, SH13, SH14, SH15, SH16 and SH18) are used

Exit level outcomes and associated assessment criteria:

1. Communicate in a variety of ways in a social housing context

Associated assessment criteria

- 1.1. Unit standards 12154, 12155, 8975 and 8976 are assessed in a social housing context.

2. Use mathematics in real life and social housing contexts

Associated assessment criteria

- 2.1. Unit standards 7447, 7448, 7450, 7451 and 7469 are assessed in real life and social housing contexts

3. Apply basic social housing principles to the supervision of social housing property

Associated assessment criteria

- 3.1. The documented evidence provided for unit standards SH16, 14656, 11817 and 11816 is reviewed.
- 3.2. The ability to integrate the competencies acquired in the above unit standards is demonstrated in a case study

4. Assist at a first line level in the business administration elements of social housing

Associated assessment criteria

- 4.1. The evidence provided for unit standards SH11 and SH14 is sufficient

5. Manage the social dynamics and resident communication within a social housing project

Associated assessment criteria

- 5.1. The documented evidence provided for unit standards SH10, SH13 and SH16 is reviewed.
- 5.2. The ability to integrate the competencies acquired in the above unit standards is demonstrated in a case study

6. Coordinate first line maintenance of a social housing property

Associated assessment criteria

- 6.1. The evidence provided for unit standards SH15 is sufficient

7. Apply basic management principles and skills in a social housing context

Associated assessment criteria

- 7.1. Basic principles of quality management are applied across the range of operational tasks associated with housing supervision
- 7.2. Basic principles of project management are applied across the range of operational tasks associated with housing supervision

8. Assist in maintaining the financial sustainability of a social housing institution

Associated assessment criteria

- 8.1. The ability to apply in an integrated way across a range of operational activities the understanding that customer satisfaction is fundamental to reducing financial risk is demonstrated

Range of activities refers to unit standards 10144, 10387, 13941, SH10, SH13, SH16 and SH18.

For award of the *whole* qualification, candidates must achieve the required number of credits as specified in the rules of combination in section 14 below, as well as the criteria specified for integrated assessment in section 15 below.

Should candidates exit the qualification *without completing the whole qualification*, recognition may be given for each exit level outcome achieved. For award of a particular exit level outcome, candidates must achieve:

- all the Core and Elective unit standards associated with the particular exit level outcome as per the specifications contained within each unit standard, and
- the criteria specified for integrated assessment in point 18 below.

14. Learning components and rules of combination:

Credit composition per unit standard category and NQF Level

	Level 1	Level 2	Level 3	Level 4	Totals
Fundamental	14	2	0	20	36
Core	5	5	0	72	82
Elective	13	3	9	90	At least 17
TOTALS	32	10	9	182	At least 135

The following depicts the rules of combination for this qualification:

Fundamental:	All unit standards listed as fundamental below, totalling 36 credits, are compulsory
Core:	All unit standards listed in the core section, totalling 82 credits, are compulsory.
Elective:	Unit standards with a total weighting of 115 credits are listed in this category below. The learner is required to select unit standards totalling at least 17 credits from the list of elective unit standards, in order to achieve at least 135 credits.

The tables below list the unit standards associated with each exit level outcome.

Learning sub-field	NLRD No.	Unit Standard Title	Level	Credits
FUNDAMENTAL				
Exit Level Outcome 1: Communicate in a variety of ways in social housing contexts				
Communication	12154	Apply comprehension skills to engage with oral text in a business environment	4	5
	12155	Apply comprehension skills to engage with written text in a business environment	4	5
	8975	Read, analyse and respond to a variety of texts	4	5
	8976	Write for a wide range of contexts	4	5
Exit Level Outcome 2: Use mathematics in real life and social housing contexts				
Mathematics	7447	Working with numbers in various contexts	1	6
	7448	Work with patterns in various contexts.	1	4

	7450	Work with measurement in a variety of contexts	1	2
	7451	Collect, analyse, use and communicate numerical data.	1	2
	7469	Use mathematics to investigate and monitor the financial aspects of personal and community life	2	2

Category	NLRD No.	Unit Standard Title	Level	Credits
CORE & ELECTIVE				
Exit Level Outcome 3: Apply basic social housing principles to the supervision of social housing property				
CORE	14656	Demonstrate an understanding of sexuality and sexually transmitted infections including HIV/AIDS	1	5
	11816	Demonstrate knowledge and understanding of the rights and responsibilities of the individual under the South African Constitution	2	2
	11817	Demonstrate knowledge and understanding of the structures that reinforce and support human rights in South Africa	2	3
	SH16	Demonstrate knowledge of and explain social housing concepts, principles and processes	4	3
ELECTIVE	14664	Demonstrate knowledge of diversity within different relationships in the South African society	1	3
	10020	Demonstrate understanding of competitive environment	4	4
Exit Level Outcome 4: Assist at a first line level in the business administration elements of social housing				
CORE	SH11	Implement tenant entry and exit procedures in a social housing context	4	4
	SH14	Support payment management in a social housing context	4	5
ELECTIVE	SH18	Manage access control in a social housing project	4	6
Exit Level Outcome 5: Manage the social dynamics and resident communication within a social housing property				
CORE	SH10	Apply inter-personal skills to support resident communication and promote social housing	4	8
	SH13	Monitor and deal with resident behaviour in a social housing context	4	12
ELECTIVE	14659	Demonstrate an understanding of factors that contribute towards healthy living	1	4
	9965	Render basic first aid	2	3
	13914	Conduct a formal meeting	3	3
	110053	Conduct a basic community needs assessment	4	12
	11506	Conduct evacuations and emergency drills	4	17

Category	NLRD No.	Unit Standard Title	Level	Credits
Exit Level Outcome 6: Coordinate first line maintenance of a social housing property				
CORE	SH15	Manage first line maintenance in a social housing institution	4	12
ELECTIVE	10142	Fulfil procurement activities and supervise procurement administration	4	8
	9243	Monitor occupational health and safety in the workplace	4	8
Exit Level Outcome 7: Apply basic management principles and skills in a social housing context				
CORE	13941	Apply the budget function in a business unit	4	5
	13835	Contribute to project initiation, scope definition and scope change control	4	9
	13944	Describe the relationship of junior management to the general management function	4	5
	10144	Identify, suggest and implement corrective actions to improve quality	4	6
ELECTIVE	14661	Demonstrate knowledge of self in order to understand one's identity and role within the immediate community and South African society	1	3
	15091	Plan to manage one's time	1	3
	10150	Provide assistance in implementing and assuring project work is conducted in accordance with the project quality plan	3	6
	110057	Conduct a self-evaluation of own progress and development	4	2
	14667	Describe and apply the management functions of an organisation	4	10
	PP4.10	Identify and coordinate facilities management opportunities	4	5
	10131	Identify, organise and co-ordinate project life cycle phases for control purposes	4	5
	10139	Implement project administration processes according to requirements	4	5
	10135	Work as project team member	4	8
Exit Level Outcome 8: Assist in maintaining the financial sustainability of a social housing institution				
CORE	10387	Investigate ways of managing financial risk in own lives	4	3
	See also unit standards 10144, 10387, 13941, SH10, SH13, SH16 and SH18			

15. Integrated assessment:

Assessment should be in accordance with the following general and specific principles:

- The initial assessment activities should focus on gathering evidence in terms of the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Where assessment at title level is unmanageable, then the assessment can focus on each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.
- Evidence must be gathered across the entire range specified in each unit standard, as applicable. Assessment activities should be as close to the real performance as possible, and where simulations or role-plays are used, there should be supporting evidence to prove that the candidate is able to perform in the real situation.
- All assessments should be conducted in accordance with the following universally accepted principles of assessment:
 - use appropriate, fair and manageable methods that are integrated into real work-related or learning situations;
 - judge evidence on the basis of its validity, currency, authenticity and sufficiency; and
 - ensure assessment processes are systematic, open and consistent.

16. Recognition of prior learning:

This qualification can be achieved wholly or in part through recognition of prior learning in terms of the defined exit level outcomes and/or individual unit standards.

Evidence can be presented in various ways, including international and/or previous local qualifications, products, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records.

All such evidence will be judged in accordance with the general principles of assessment described above and the requirements for integrated assessment.

17. Articulation possibilities:

This proposed Certificate in Social Housing Supervision would prepare learners to enter learning programmes leading to either the proposed Certificate in Social Housing Property Development or the proposed Certificate Social Housing Property Management, and would as well provide articulation possibilities with qualifications in the sub-field of Office Administration, Project Management and Real Estate.

18. International comparability:

International qualifications were examined to ensure the qualifications model and unit standards proposed are comparable in terms of qualifications levels, scope of coverage and competencies covered.

Qualifications from the following countries and sites were researched:

- Australia (National Training Information Service)
- UK (Chartered Institute of Housing, City and Guilds)
- New Zealand (National Qualifications Framework)
- Canada (Department of Human Resources and Skills Development)
- Holland
- Sweden
- Norway

The latter four (Canada, Holland, Sweden and Norway) were included in the research because they have active social housing movements and useful exchanges have already

taken place between those countries and South Africa. However, no useful material could be found from any of them.

Holland: Investigations conducted through Dutch social housing technical experts currently in South Africa revealed that Holland does not have an NQF type structure, so a sector-based qualification system has been considered for social housing. At present this has not materialised. Some ad hoc or short courses in social housing were found. The most promising of these was described in Dutch, which made interpretation difficult, but it appears that many of the topics covered by this qualification are also covered, interestingly, with a task orientation similar to ours. Some university-based courses in urban renewal or urban development are available, but these are not considered relevant to the present discussion.

Sweden: In Sweden, the only qualifications for social housing that could be found related to trades in construction. These were not considered relevant to the present study.

Norway: No sector-wide or even national qualifications were found for social housing, except some relating to construction.

New Zealand: Although New Zealand has an NQF very similar to ours, nothing on social housing could be found. The closest was several unit standards from the field Family, community and social studies, for example a level 2 unit "Complete a study of societal influences on housing". This is not related to social housing.

This leaves the results from Australia and the UK that provided useful comparisons.

Australia: The National Training Information Service of the National Australian Training Authority revealed that there are three national qualifications in social housing. These are:

- CHC30702 Certificate III in Social Housing
- CHC40802 Certificate IV in Social Housing
- CHC50602 Diploma of Social Housing

The first is introductory and is aimed at the admin assistant level. It focuses mostly on the social issues rather than any technical or maintenance issues. The Level IV certificate is intended for housing officers. It includes some management training, but is primarily for leasing and tenancy management functions. The Diploma of Social Housing is management oriented, and seems focused on middle to senior management who require a general understanding of social housing rather than a more task-oriented focus.

Overall the Australian Certificate III in Social Housing is similar in style and coverage to this proposed qualification in social housing. They have fewer core unit standards and more electives, and they are more generic than this qualification, which is more task-oriented. Given the emerging nature of the social housing sector in South Africa and its skills base, this greater task-orientation is to be expected and is considered appropriate.

United Kingdom: The Chartered Institute of Housing is the primary agency for training in social housing. The qualifications obtained through the CIH are:

- Level 2 Certificate in Housing – very basic, not much practical. Aimed at volunteer/intro level
- Level 3 Certificate in Housing – for those who are more directly or actively involved in social housing, has an academic slant and is not very applied.
- Level 3 National Certificate in Tenant Participation and Neighbourhood Renewal
- Level 4 Certificate/Diploma in Housing
- Professional qualifications – these are courses that can be taken at undergraduate level or at postgraduate level, either to re-orientate another degree course towards housing, or to extend an existing housing degree course.

In all cases these courses have both an academic and a practical component. The academic component of each seems to have preceded the practical, with the result that the qualifications have a theoretical emphasis, and are generalist in nature. The practical components of the qualifications were only recently developed and, as with the Australian qualifications, are more general and less task-oriented than ours. The tendency is also to cover issues of relevance to the sector as a whole rather than at the organisational level. This may be a direction we in South Africa will have to pursue later, but our present need is for more on the job and focused training. For this reason, while the UK qualifications at UK level 3 are comparable to this proposed qualification, the latter is considered more appropriate for South Africa's present needs.

19. Accreditation and Moderation:

- Providers offering learning towards this qualification or the component unit standards must be accredited by the relevant ETQA.
- Moderation of assessment will be overseen by the relevant ETQA according to moderation principles and the agreed ETQA procedures.

20. Registration of assessors:

Assessors must be registered in terms of the requirements of SAQA and the relevant ETQA.

21. Critical cross-field outcomes:

This qualification addresses the following critical cross-field outcomes, as detailed in the associated unit standards:

- a) Identifying and solving problems in which responses indicate that responsible decisions using critical and creative thinking have been made.
- b) Working effectively with others as a member of a team, group, organisation or community.
- c) Organising and managing oneself and one's activities responsibly and effectively.
- d) Collecting, analysing, organising and critically evaluating information.
- e) Communicating effectively using visual, mathematical and/or language skills in the modes of oral/written persuasion.
- f) Using science and technology effectively and critically, showing responsibility towards the environment and health of others.
- g) Demonstrating and understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

Learning programmes directed towards this qualification will also contribute to the full personal development of each learner and the social and economic development of the society at large, by making individuals aware of the importance of:

- 1) Reflecting on and exploring a variety of strategies to learn more effectively.
- 2) Participating as responsible citizens in the life of local, national and global communities.
- 3) Being culturally and aesthetically sensitive across a range of social contexts.
- 4) Exploring education and career opportunities; and developing entrepreneurial opportunities.

and packaging materials).

UNIT STANDARD CCFO ORGANISING

Collect, analyse, organise and evaluate all information with regard to the location of household items placement.

UNIT STANDARD CCFO DEMONSTRATING

Demonstrate an understanding of the world as a set of related systems (to ensure that the household items are carefully removed from packaging).

UNIT STANDARD CCFO COMMUNICATING

Communicate effectively to determine customer requirements, report damages/shortages and to advise crew.

UNIT STANDARD ASSESSOR CRITERIA

Conducting assessments

- Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA and be familiar with the full text and subject matter content of the Unit Standard being assessed.
- The assessor must ensure that the assessment covers the specific outcomes, critical cross-field outcomes and essential embedded knowledge.

UNIT STANDARD NOTES

Definition:

Foreign Object - any article/object that was utilised for packaging material (for example, cardboard, paper, bubble wrap, foam, tape etc).

Methods and tools of assessment:

The following methods of assessment have been identified as the preferred measurement and assessment of learner competence in the above-mentioned Performance Assessment Criteria

1. Knowledge tests
2. In - situ (on the job) observations
3. Feedback from third parties, e.g. customers

These methods must be carefully selected based on the purpose of the assessment. The assessment must integrate a number of different methods in order to give the assessor reliable and valid proof of competence and evidence of required attitudes

The following tools may be used to supplement the above minimum assessment methods:

Valid, reliable and authentic evidence (presented as a portfolio of evidence) from past achievements and experience may serve to supplement the assessment of applied competence. The portfolio should include inter alia:

1. Written statements from persons (e.g. current and/or previous employer, colleague, peer, manager, external customers) confirming competence of the learner
2. Relevant certificates or awards
3. Previous assessment records

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No. 1264

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Mathematical Literacy and Mathematical Science

Registered by NSB.10, Physical, Mathematical, Computer and Life Sciences publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield.

Comment on the qualification and unit standards should reach SAQA at the address **below and no later than 28 November 2004**. All correspondence should be marked **Standards Setting – SGB Mathematical Literacy and Mathematical Science** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431 5144

e-mail: dmphuthing@saga.co.za

JOE SAMUELS

DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

UNIT STANDARDS IN MATHEMATICAL LITERACY AND MATHEMATICAL SCIENCE

UNIT STANDARD TITLE	NQF LEVEL	CREDITS
Work with numbers; operations with numbers and relationships between numbers	ABET Level 1	6
Demonstrate an understanding of patterns, functions and algebra	ABET Level 1	2
Work with shape, space and measurement concepts	ABET Level 1	2
Work with numbers; operations with numbers and relationships between numbers	ABET Level 2	5
Demonstrate an understanding of patterns, functions and algebra	ABET Level 2	4
Work with shape, space and measurement concepts	ABET Level 2	3
Demonstrate understanding of data handling and probability	ABET Level 2	3
Work with numbers; operations with numbers and relationships between numbers	ABET Level 3	5
Work with patterns, functions and algebra in different contexts	ABET Level 3	4
Apply concepts of shape, space and measurement to make decisions relative to the world around us	ABET Level 3	4
Demonstrate an understanding and use of data handling and probability concepts	ABET Level 3	4
Work with numbers; operations with numbers and relationships between numbers	ABET Level 4	4
Describe, interpret and represent mathematical patterns, functions and algebra in different contexts	ABET Level 4	6
Describe and represent objects in terms of shape, space and measurement	ABET Level 4	5
Evaluate and solve data handling and probability problems within given contexts	ABET Level 4 (NQF Level 1)	

No. 1265

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Computer Sciences and Information Systems

Registered by **NSB 10, Physical, Mathematical, Computer and Life Sciences** publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield.

Comment on the qualification and unit standards should reach SAQA at the address **below and no later than 28 November 2004**. All correspondence should be marked **Standards Setting – SGB Computer Sciences and Information Systems** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: *Mr. D Mphuthing*
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or faxed to 012 – 431 5144
e-mail: dmphuthing@saga.co.za

JOE SAMUELS
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

UNIT STANDARDS IN COMPUTER SCIENCES AND INFORMATION SYSTEMS

UNIT STANDARD TITLE	NQF LEVEL	CREDITS
Demonstrate an understanding of the practical application of the Availability Management process within the context of Information Technology Service Management	5	7
Demonstrate an understanding of the practical application of the Capacity Management process within the context of IT Service Management	5	6
Demonstrate an understanding of the practical application of the Change Management process within the context of the Information Technology Service Management process	5	5
Demonstrate an understanding of the practical application of the Configuration Management process within the context of the Information Technology Service Management	5	6
Demonstrate an understanding of the practical application of the Incident Management within the context of Information Technology Service Management	5	5
Demonstrate an understanding of the practical application of the Information Technology Financial Management process within the context of the Service Management process	5	7
Demonstrate an understanding of the practical application of the Information Technology Service Continuity Management process within the context of the IT Service Management process	5	6
Demonstrate an understanding of the practical application of the Problem Management process within the context of Information Technology Service Management	5	6
Demonstrate an understanding of the practical application of the Release Management process within the context of the Information Technology Service Management	5	6
Demonstrate an understanding of the concept and practical implementation of the Service Desk within the concept of Information Technology Service Management Process	5	6
Demonstrate an understanding of the practical application of the Service Level Management process within the context of Information Technology Services Management	5	7

No. 1266

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Physical Sciences

Registered by NSB 10, Physical, Mathematical, Computer and Life Sciences publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield.

Comment on the qualification and unit standards should reach SAQA at the address **below and no later than 28 November 2004**. All correspondence should be marked **Standards Setting – SGB Physical Sciences** and addressed to

The Director: Standards Setting and Development
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JOE SAMUELS
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

UNIT STANDARDS IN PHYSICAL SCIENCES

Title:	Level:	Credits:
Respond to In-Flight Medical Emergencies	4	11
Respond to In-flights Incidents and Emergencies	4	11
Maintain Aeroplane Hygiene	5	2
Provide In-flight Passenger Care	4	23
Manage Emergency Situations	5	43
Maintain the Safety and Security of Aeroplane and Occupants In-flight and on the Ground	4	11

No. 1267

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Financial Services

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the unit standards should reach SAQA at the address ***below and no later than 28 November 2004***. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standards Setting and Development
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Attention: Mr. D Mphuthing
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e-mail: dmphuthing@saqa.co.za

JOE SAMUELS**DIRECTOR: STANDARDS SETTING AND DEVELOPMENT**



National Certificate: Financial Services: NQF Level 3

1. **FIELD:** Business, Commerce and Management Studies
2. **SUB-FIELD:** Finance, Economics and Accounting
3. **NQF LEVEL:** 3
4. **CREDITS:** A minimum of 120
5. **RATIONALE FOR THE QUALIFICATION:**

The National Certificate in Insurance Administration: Level 3 NLRD No 20177 was registered in 2001 to meet the needs of multiple work roles, organisational requirements and the changing technological nature of the insurance industry. It provided a broad knowledge of the insurance industry and progress along a career path for learners in the insurance industry.

The financial services environment has changed substantially since 2001. The introduction of The *Financial Advisory and Intermediary Services Act*, (Act 37 of 2002 (FAIS)) and the *Finance Intelligence Centre Act*, (Act 38 of 2001 (FICA)) has raised awareness about issues of compliance. In addition, The *Fit and Proper* registration requirements of the Financial Services Board (FSB) require intermediaries to hold certain educational Qualifications. The risk to financial service businesses across the sector if administrative personnel are not aware of compliance issues is now of major concern to the industry. Administrative work in the industry, in general, is at Level 3.

The Financial Charter was adopted in 2003. As part of the Charter, the Financial Services Industry undertook to offer a number of learnerships in Financial Services to unemployed youth. The number of employees in the sector continues to shrink and it is unlikely that the industry will be able to offer employment to the number of people it is required to train in learnerships. In consultations with the Department of Labour it was agreed that the industry should offer learnerships towards a financial services Qualification and provide the opportunity for unskilled and unemployed youth to acquire skills and work experience. It was agreed that the required Qualification should include life skills and entrepreneurship so that the learners are able to seek employment in another sector or start their own businesses. This will help to address the skills shortage in the country and provide opportunities for people who, at present, do not have marketable skills and experience. The proposed *National Certificate: Financial Services: Level 3* will enable the industry to fulfill its learnership obligations and a number of Unit Standards that focus on life skills have been included to ensure that the Qualification is fit for purpose.

The National Certificate: Financial Services: Level 3 will replace the National Certificate in Insurance: Level 3 when the National Certificate in Insurance: Level 3 reaches the end of its registration period.

	Services industry in South Africa		
114985	Indicate how different needs lead to the development of different financial services products.	3	4
To replace 8993	Interpret current affairs related to a selected business sub sector.	3	10
114960	Investigate the need to provide financially for own retirement.	3	3
114970	Manage risk in own life.	3	3
114979	Operate a computer workstation in a business environment.	3	2
114984	Manage electronic mail in a business environment.	3	2
SGB Life Skills	Describe how to manage workplace relationships.	3	2
114952	Apply problem-solving techniques to make a decision or solve a problem in a real life context.	3	2
114962	Investigate the structure of a financial services workplace.	2	3
113904	Explain how money laundering legislation impacts on monetary transactions in South Africa.	2	2
113924	Apply basic business ethics in a work environment.	2	2
113918	Explain the implications of the Financial Advisors and Intermediaries Services Act, (FAIS) for employees in financial services organisations.	2	2
114974	Apply the basic skills of customer service	2	2
New standard	Manage time effectively to enhance productivity and enable a balanced lifestyle.	3	2
TOTAL FOR CORE COMPONENT			54
Elective Component (Choose a minimum of 20 credits.)			
Computer Literacy			
114981	Capture numerical data and text information on electronic database	2	2
114978	Use a word processing package to produce business documents.	3	3
114979	Use a spreadsheet package to produce business documents	3	3
114980	Use a presentation package to produce business documents	3	3
114915	Use a web browser in a business environment.	3	3
New standard	Investigate the upside and downside business risk in hand held electronic devices	3	3
113911	Use an electronic system as a tool in a financial services context.	3	2
113912	Use an electronic system to propose a financial solution.	4	3
General Administration and Industry Knowledge			
114959	Behave in a professional manner in a business environment.	2	4

114973	Identify the types of records required in the financial services industry and indicate why it is necessary to create evidence.	2	2
114971	Maintain an existing information system in a financial services environment.	2	2
114957	Contribute to the health, safety and security of a financial services workplace.	2	2
New	Explain basic economics	3	3
14994	Explain insurable risk	4	2
14991	Apply the law of contract to insurance.	4	2
14979	Describe issues of compliance or non-activity that could result in civil or criminal liability in terms of business law.	4	2
113923	Explain fiduciary responsibilities and the associated risks.	4	1
Bookkeeping and accounting			
New standard	Apply knowledge of basic accounting principles to financial services.	3	4
SGB Book keeping	Compile reconciliation statements.	3	6
SGB Book keeping	Prepare general ledger accounts and initial trial balance.	3	5
SGB Book keeping	Administer payments and expenses.	3	4
SGB Book keeping	Administer income and receipts.	3	4
SGB Book keeping	Calculate and record Value added Tax Transactions.	3	5
SGB Book keeping	Administer credit purchases transactions.	3	3
SGB Book keeping	Understand the petty cash system.	3	3
Financial Services Related Personal Development			
New standard	Manage own work performance in relation to an organisation's performance management system.	3	2
113907	Explain the impact of personal wellness on work performance.	3	2
12547	Demonstrate knowledge and understanding of the role, functions and duties of trustees of retirement funds.	3	4
12548	Demonstrate ability to use and interpret texts that apply to the role and responsibilities of trustees of retirement funds.	3	4
12550	Demonstrate knowledge and understanding of the role, functions and duties of trustees of medical schemes.	3	4
SGB Life Skills	Apply knowledge of self and own situation to manage the risks resulting from change in the workplace.	3	3
114932	Explain how to manage diversity in the workplace.	3	2
SGB Life Skills	Identify causes of stress and techniques to	3	2

	manage it in the workplace.		
SGB Life Skills	Apply knowledge of HIV/AIDS to a specific business sector and a workplace.	3	4
114936	Participate effectively in a team or group.	2	2
113929	Render basic first aid in an office workplace.	2	4
114945	Identify ways of managing relationships in own life.	2	2
114950	Apply ways of leading in different situations.	2	3
114940	Identify risks associated with substance abuse and dependency in own life.	2	2
114933	Identify risks associated with disability in own life.	2	2
114939	Identify causes of stress in own life and techniques to manage it.	2	2
114949	Identify oneself with a situation of abuse and develop coping mechanisms.	2	2
114944	Identify ways to manage anxiety and depression in own life situation.	2	2
11816	Demonstrate knowledge and understanding of the rights and responsibilities of the individual under the South African Constitution	2	2
11817	Demonstrate knowledge and understanding of the structures that reinforce and support human rights in South Africa.	2	3
12549	Demonstrate knowledge and understanding of the individual's basic rights and responsibilities under a medical scheme.	1	1
12546	Demonstrate knowledge and understanding of the individual's basic rights and responsibilities under a group retirement fund.	1	1
Long Term (Life, GB and HBA)			
114983	Describe life insurance.	3	3
To replace 8986	Indicate the scope of life insurance in South Africa.	3	4 on review
114956	Describe funeral insurance.	3	2
To replace 14431	Administer a long term insurance claim.	3 on review	2
To replace 10395	Describe group insured benefits.	4	2
To replace 10394	Analyse the role of group retirement benefits in the insurance industry.	4	2
To replace 10390	Analyse different group retirement products.	4	2
To replace 9003	Administer long term employee benefits and medical scheme membership.	3	3 on review
New standard	Administer basic asset related transactions in a Retirement Fund.	3	3
113910	Describe disability insurance solutions in the context of financial planning.	4	4
113913	Investigate dread disease products and their place in wealth management	4	2
113931	Describe the main aspects of pre and post retirement planning.	4	2
HBA			
114972	Explain Healthcare Benefits Administration in South Africa.	3	2

To replace 12314	Explain the use of coding in Healthcare Benefits Administration.	4	4
To replace 12323	Describe healthcare cover in South Africa.	3 changed on review	2 changed on review
113927	Analyse the proposed National Health Policy as a means of providing healthcare for the nation.	4	4
Short Term			
114964	Describe short term insurance	3	3
To replace 8997	Indicate the scope of short term insurance in South Africa.	3	3
New standard	Explain insurance transactions specific to Lloyd's of London.	3	2
To replace 10370	Process a short term personal domestic insurance claim.	4	3
14978	Process a claim in credit risk insurance.	4	4
New standard	Explain aviation insurance	3	2
Collective Investments			
8990	Describe collective investment schemes.	3	2
8999	Outline the structure of the collective investment industry	3	2
9000	Indicate how collective investment scheme portfolios are reported.	3	2
9001	Explain basic transactions in the collective investment industry.	3	2
New standard	Administer basic asset related transactions.	3	5
New standard	Administer basic client related transactions in a Collective Investment Scheme Manager or Linked Investment Service Provider (LISP).	3	10
12180	Describe the sales function in a Collective Investment Schemes Manager or Linked Investment Service Provider (LISP).	4	4
12183	Indicate how different needs lead to the development of different investment products.	4	5
113916	Explain basic investment principles.	4	3
113906	Explain Capital Markets and capital market instruments. NB note the title	4	2
113905	Explain Equity Markets and equity market instruments.	4	2
113908	Explain Money Markets and money market instruments NB note the title	4	2
Sales and marketing			
114958	Market an assistance policy.	2	3
14319	Explore strategies to retain or expand existing business in the insurance/investment industry.	4	3
113903	Demonstrate skills and techniques required to build a relationship with a client in a financial services environment	4	3
113921	Apply knowledge of the sales cycle in wealth	4	3

	management		
Legislation			
114966	Explain the types of compulsory statutory insurance in South Africa.	3 note level	2
12166	Demonstrate knowledge and insight into the Collective Investment Schemes Act, 45 of 2003 (CICSA).	4	2
12164	Demonstrate knowledge and insight of the Financial Advisory and Intermediary Services Act (FAIS) (Act 37 of 2002).	4	2
14506	Explain the Financial Intelligence Centre Act, 38 of 2001 and the implications of the act for client relations.	4	3
14315	Demonstrate knowledge and insight into the Income Tax Act (58 of 1962) as amended as it applies to insurance and investment products. Note title	4	2
10381	Demonstrate knowledge and understanding of the Value Added Tax Act, (VAT) 89 of 1991 as amended as it applies to insurance policies.	4	2
12167	Demonstrate knowledge and understanding of the Capital Gains Tax Legislation as it applies to insurance and investment.	4	2
10392	Demonstrate knowledge and insight into the Estate Duties Act (45 of 1955) as it applies to insurance.	4	2
To replace 12332	Apply the regulations for disclosure that are required as part of the financial sales process.	4	2
To replace 12335	Apply knowledge of the current Medical Schemes Act and the accompanying regulations.	4	3
113932	Explain The Medicines And Related Substances Control Amendment Act, 59 of 2003 as it impacts on medical schemes.	4	2
To replace 10378	Apply knowledge and insight into the statutory cover afforded under the Compensation For Occupational Injuries And Diseases Act, 130 of 1993, as amended (COIDA).	4	3
To replace 10377	Explain the scope of the Compensation for Occupational Injury and Disease Act 130 of 1993 (COIDA).	4	2
To replace 10391	Explain the legislation relating to marriage, divorce and maintenance as it applies to retirement benefits.	4	2
To replace 10393	Analyse the Pension Funds Act as it applies to the administration of retirement funds.	4	3 changed on review
10364	Describe the standard insurance cover in terms of SASRIA.	4	4 changed on review
To replace 14316	Apply knowledge and insight into aspects of the Long Term Insurance Act (1998).	4	2
To replace	Apply knowledge and insight into the Short	4	3 changed

10194	Term Insurance Act (No 53 of 1998) and the accompanying regulations.		on review
Additional financial literacy			
10717	Examine the application of the Basic Conditions of Employment Act and its effect on earnings in own contract.	2	2
10715	Investigate credit in own circumstances.	2	3
10718	Use a personal budget to manage own money.	2	3
10716	Examine the costs and benefits of using banking institutions for managing personal finances.	2	2
To replace 10386	Investigate the possibilities of establishing and running a small business enterprise (SMME).	4	3
To replace 10387	Investigate ways of managing financial risk in own lives.	4	5 changed on review
To replace 10385	Develop a business plan for a small business	4	5
To replace 10389	Describe and apply the basic principles of personal income tax.	4	3
To replace 10388	Interpret basic financial statements.	4	4 changed on review
Management			
13912	Apply knowledge of self and team in order to develop a plan to enhance team performance.	3	5
13917	Indicate the role of the team leader in ensuring that a team meets an organisation's standards.	3	4
13914	Conduct a formal meeting.	3	3
113909	Coach a team member in order to enhance individual performance in a work environment.	3	5
13948	Negotiate an agreement or deal in an authentic work situation.	4	5
13949	Apply technical knowledge and skill to align business unit performance to business goals.	4	5
13947	Motivate a team	4	6
114215	Mentor a colleague to enhance the individual's knowledge, skills, values and attitudes in a selected career path.	4	3
114212	Explain the impact of organisational wellness on a business environment and indicate a strategy for a business unit.	4	3
TOTAL FOR ELECTIVE COMPONENT			356 Min 20
TOTAL FOR QUALIFICATION			120

No. 1268

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Development Practitioners

Registered by NSB 05, Education, Training and Development, publishes the following unit standard for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standard upon which qualifications are based. The full unit standard can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 1067 Arcadia Street, Hatfield Forum West, Hatfield, Pretoria.

Comment on the unit standards should reach SAQA at the address ***below and no later than 28 November 2004***. All correspondence should be marked **Standards Setting – SGB for Development Practitioners** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 431-5144
dmphuthing@saga.co.za


JOE SAMUELS

DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

Established in terms of Act 58 of 1995**National Diploma in Orientation and Mobility Practice
(NQF Level 5)**

NQF Level	:	5
Credits	:	239 (Minimum) Fundamental Component: 21 credits Core Component: 205 credits Elective Component: 13 credits
Field	:	Education, Training and Development
Sub-field	:	Occupationally Directed ETD Practice

Rationale:

A National Diploma in Orientation and Mobility Practice (NQF Level 5) will equip qualified learners to facilitate the independence of persons who are blind or partially sighted, thereby enhancing the quality of life of such persons. The Qualification not only equips the learner with specific competencies, but also those persons whose learning is facilitated by the qualified Orientation and Mobility Practitioner. The consequence of this is that the qualified learners can increase their earning capacity, as well as that of the individual who is blind or partially sighted who is assisted by the qualified practitioner. The qualified Orientation and Mobility Practitioners thus positively affect their communities through their services.

Purpose of the Qualification

The purpose of the Qualification is to ensure that practitioners are capable of enabling persons who are blind or partially sighted to be functionally independent by teaching them effective and appropriate orientation and mobility and skills of daily living. Such life skills will empower people who are blind or partially sighted and promote educational, social and economic inclusivity. The Qualification and its components are suited to train professionals who educate and train, as well as non-professionals such as parents and caregivers who are in contact with persons who are blind or partially sighted. The Qualification provides learners with the competencies to advocate for the necessity of Orientation and Mobility competence for people who are blind or partially sighted.

The qualified learners thus support people who are blind or partially sighted to enhance the quality of their lives, promote inclusion in the community and benefits the economy by adding to the competency pool and employability of people who are blind or partially sighted. Qualified learners are capable of:

- Reading and writing Grade 1 (Uncontacted) Braille
- Presenting information in reporting formats
- Applying self management concepts
- Facilitating activities of daily living for persons who are blind or partially sighted in a controlled environment
- Mapping aspects of the environment for persons who are blind or partially sighted
- Orientating themselves to the environment when experiencing a visual barrier
- Travelling through environments whilst experiencing a visual barrier
- Facilitating travelling through environments for people who are blind or partially sighted
- Developing learning strategies for persons who are blind or partially sighted
- Guiding and supporting persons who are blind or partially sighted, taking into account the principles of inclusion within the South African context
- Conducting research and liaising relevant to learning situations
- Establishing community resource projects
- Designing, implementing and following up on internal assessment for adult learners
- Conducting basic lay counselling in a structured environment
- Conducting advocacy campaigns and workshops in development practice
- Completing research assignments
- Facilitating learning in a professional, ethical way
- Enhancing visual functioning of persons experiencing low vision to improve quality of life

Qualified learners also elect to become capable of:

- Setting up a business that is viable
- Facilitating the development of quality of life skills in children who are blind or partially sighted
- Facilitate the enhancement of life quality of persons with visual disabilities experiencing additional barrier/s

Access to the Qualification

Access to the Qualification is open, although it is recommended that the learning assumed to be in place for the Unit Standards should be considered before embarking on learning towards this Qualification.

Learning assumed to be in place

The design and credits of this Qualification are based on the assumptions that learners have already attained the following competencies, before embarking on learning towards this Qualification:

- Communication at NQF Level 4 in one language
- Communication at NQF Level 3 in another language
- Production and use of spreadsheets for business (NLRD ID Nr 7567)
- Production and presentation of documents for business (NLRD ID Nr 7575)
- Production of word processing documents for business (NLRD ID Nr 7570)

Rules of combination

All the Fundamental Component Unit Standards are compulsory (21 credits).
All the Core Component Unit Standards are compulsory (205 credits).

For the Elective Component learners are required to attain a minimum of 13 credits out of 52 available credits.

Exit level outcomes and associated assessment criteria

Exit Level Outcomes	Associated Assessment Criteria
Fundamental and Core	
Communicate effectively with persons experiencing a visual barrier using Braille	<ul style="list-style-type: none"> • Writing in Braille is achieved through the use of appropriate equipment that meets code requirements • Reading in Braille is demonstrated through accurate recognition and interpretation of codes • Braille messages are interpreted congruent with specific texts • Written Braille is edited to ensure optimal reader-friendliness of persons who are blind or partially sighted • Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times
Present and manage information to enhance own professional conduct	<ul style="list-style-type: none"> • Own strengths and weaknesses identified are explained in terms of specific context requirements and observed examples • Analysis of own strengths and weaknesses identifies strategies for compensation where required • Areas for improvement in specific contexts are identified and addressed appropriately for such contexts • Reports are compiled that meet specified requirements • Proper conduct is determined and regulated by adhering to specified ethical and professional requirements to at all times
Travel through an environment whilst experiencing a visual barrier	<ul style="list-style-type: none"> • Orientation is done effectively whilst experiencing a visual barrier • Environment is dealt with in a safe way whilst experiencing a visual barrier • Assistive devices (including guides and long canes) are used to travel through environments are used effectively for such environments • Empathy for persons experiencing a visual barrier is explained within the context of specific environments
Facilitate the travel of persons experiencing a visual barrier through an environment	<ul style="list-style-type: none"> • Orientation and travel for persons who are blind or partially sighted are facilitated in a way that promotes the safety and quality of life of such persons • The use of assistive devices (includes sighted guides and long canes) is facilitated for persons who are blind or partially sighted and promotes safety • The performance of activities of daily living by persons who are blind or partially sighted is facilitated effectively for specific contexts • The safe independence of persons who are blind or partially sighted is facilitated by providing the necessary requirements • Proper conduct is determined and regulated by adhering to specified ethical and professional requirements all times
Provide various means of support for persons experiencing a visual barrier	<ul style="list-style-type: none"> • Maps are compiled for the appropriate and optimal use by persons who are blind or partially sighted • Support provided for persons who are blind or partially sighted is justified in terms of optimal learning • Identification of needs for emotional support for persons who are blind or partially sighted is justified in terms of observed indicators of needs

Exit Level Outcomes	Associated Assessment Criteria
	<ul style="list-style-type: none"> Emotional support is provided for persons who are blind or partially sighted, appropriate for specific contexts Proper conduct is determined and regulated by adhering to specified ethical and professional at all times
Conduct advocacy campaigns to the benefit of persons who are blind or partially sighted	<ul style="list-style-type: none"> Planning of advocacy campaigns are conducted to optimise available resources Materials used in advocacy campaigns are adapted for those who are blind or partially sighted where required Environments and/or materials for advocacy campaigns are prepared are prepared to optimally meet the set objectives of such campaigns Advocacy campaigns are launched in a way that optimally suits the set objectives of such campaigns Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times
Facilitate the development of strategies for optimal daily functioning for persons experiencing low vision	<ul style="list-style-type: none"> Identification of needs of persons with low vision is justified in terms of observed indicators of needs Level of visual functioning is assessed against given criteria Techniques and methods to enhance daily functioning is facilitated to meet specific context requirements Strategies employed are reflected on and adapted, if necessary, to further enhance functioning Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times
Elective (at least 13 credits required to qualify)	
Facilitate optimal daily functioning for children who are blind or partially sighted	<ul style="list-style-type: none"> Assessment of children who are blind or partially sighted is conducted in order to identify constraints and potential for optimal learning Orientation and mobility of children are facilitated in a way that ensures safety Learning strategies are facilitated to promote optimal future learning Learning potential is continually monitored and facilitation adapted accordingly Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times
Facilitate the enhancement of life quality of persons with visual disabilities experiencing additional barrier/s	<ul style="list-style-type: none"> Physical or intellectual barriers are recognised ethically, with empathy, and against given criteria The impact of additional barriers on practitioner behaviour is analysed in terms of specific requirements for facilitation Learning programmes are modified for persons experiencing visual and other barriers and which meets specific requirements The suitability of adapted learning programs is justified in terms of specific requirements Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times
Develop new business ideas that are viable	<ul style="list-style-type: none"> An entrepreneurial profile is described accurately Strategic planning is justified in terms of potential improvements in business performance Business plans for a new venture are drawn up in accordance with feasibility within specific contexts Research regarding the viability of new venture ideas or

Exit Level Outcomes	Associated Assessment Criteria
	<p>opportunities is conducted to meet specified requirements</p> <ul style="list-style-type: none"> • Proper conduct is determined and regulated by adhering to specified ethical and professional requirements at all times

International comparability

Most orientation and mobility Qualifications are delivered in the United Kingdom and the United States of America. South Africa is the only African country with recorded orientation and mobility training.

In the United Kingdom, a two-year Diploma in Higher Education in Rehabilitation Studies is the equivalent of this South African Qualification. It contains an equivalent number of credits (240 credits) at the same level as this Qualification. Competencies addressed in the Qualification are equivalent with the exception of the United Kingdom Qualification addressing competencies related to the management of leisure and recreation, counselling/interpersonal skills (the South African Qualification requires referral to professionals such as psychologists) and reading and writing Grade 2 Braille. The equivalent competencies include (for 20 credits each):

- Communications
- Independent Living Skills
- Orientation & Mobility
- Social Studies/Client Assessment
- The Eye & Low Vision/Audiology
- Teaching & Learning
- Multiple Disability/Dual Sensory Loss (this is an elective in the South African Qualification)

The Qualification includes two practice placements. The South African Qualification addresses advocacy, research, travel and orientation through controlled environments whilst experiencing a visual barrier, and business development (elective) competence, not included in the United Kingdom Qualification.

The New Zealand framework has a Post Graduate Diploma in Rehabilitation specialising in rehabilitation of the visually impaired (Orientation and Mobility). The Qualification is shorter than the South African Diploma, as it consists of the equivalent of 160 credits, including a practice placement. The Qualification includes:

- Theory and Practice in Rehabilitation
- Education and Rehabilitation of the Visually Impaired
- Adaptive Communication and Activities of Daily Living
- Orientation and Mobility

The South African Qualification addresses all the above components, and also advocacy, research, travel and orientation through controlled environments whilst experiencing a visual barrier, specialisation in orientation and mobility training for children (elective) and business development (also elective).

In the United States of America, a degree (equivalent to South African NQF Level 6) and a Master of Arts in Rehabilitation of the Blind specialising in Orientation and Mobility is offered (equivalent to South African NQF Level 7), that is longer than the South African Qualification (between 300 and 360 credits) and includes an internship. The Masters Qualification (closer equivalent to the South African Qualification) includes:

- Orientation and mobility instruction
- Rehabilitation teaching

- Blindfold simulation classes
- An introduction to rehabilitation
- Medical Aspects of Blindness and Associated Disabilities
- Psychological Aspects of Disability
- Low Vision Implications
- Introduction of Methods of Mobility
- Principles of O&M
- Introduction to Research (elective)
- Managing the Learning Environment
- Techniques of the Counselling Interview
- Advanced Methods of Mobility

The South African Qualification appears to be equivalent - except for rehabilitation teaching and counselling - and addresses competencies not included in the above Master of Arts, such as advocacy, business development, communication, and specialising in training of children.

Integrated assessment

The assessment criteria of the unit standards are performance-based, assessing applied competence rather than only knowledge, or skills. In addition, learners must demonstrate that they can achieve the outcomes in an integrated manner, dealing effectively with different and random demands related to the environmental conditions in occupational contexts, to qualify. Evidence is required that the learner is able to achieve the exit level outcomes of the Qualification as a whole and thus its purpose, at the time of the award of the Qualification. Workplace experience can be recognised when assessing towards this Qualification.

Recognition of prior learning (RPL)

This Qualification can be achieved wholly, or in part, through recognition of prior learning. Evidence can be presented in a variety of forms, including previous international or local Qualifications, reports, testimonials, mentoring, functions performed, portfolios, work records and performance records. As such, evidence is judged according to the general principles of assessment described in the notes to assessors below. Learners who have met the requirements of any Unit Standard that forms part of this Qualification may apply for recognition of prior learning to the relevant Education and Training Quality Assurance body (ETQA). The applicant must be assessed against the specific outcomes and with the assessment criteria for the relevant Unit Standards. A Qualification will be awarded should a learner demonstrate that the exit level outcomes of the Qualification have been attained.

Articulation possibilities

Vertical articulation upwards is possible with small business management Qualifications, through the Elective component. Also, various unit standards also found in the National Certificate in Occupationally Directed ETD Practice (NQF Level 5) ensures horizontal articulation. Through the research competence required in the Core component, horizontal articulation with many Qualifications in the Higher Education and Training Band is possible, for example, the National Diploma in General Translation (NQF Level 5). Further horizontal articulation will be possible with a National Certificate in Braille Practice.

Moderation options

Moderation of assessment and accreditation of providers shall be at the discretion of a relevant ETQA as long as it complies with SAQA requirements. The ETQA is responsible for moderation of achievements of learners who meet the requirements of this Qualification. Particular moderation and accreditation requirements are:

- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA. Providers offering learning towards achievement of any of the unit standards that make up this Qualification must also be accredited through the relevant ETQA accredited by SAQA;
- The ETQA will oversee assessment and moderation of assessment according to their policies and guidelines for assessment and moderation, or in terms of agreements reached around assessment and moderation between the relevant ETQA and other ETQAs and in terms of the moderation guideline detailed here;
- Moderation must include both internal and external moderation of assessments for the Qualification, unless the relevant ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described in Unit Standards as well as the integrated competence described in the Qualification;
- Internal moderation of assessment must take place at the time of assessment of competence, with external moderation provided by a relevant ETQA according to the moderation guidelines and the agreed ETQA procedures;
- Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for assessors

Assessment of learner achievements is conducted by providers accredited by the relevant ETQA (RSA, 1998b) for the provision of programs that result in the outcomes specified for this Qualification. Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the ETQA. Assessors registered with the relevant ETQA must carry out the assessment of learners for the Qualification and any of the Unit Standards that make up this Qualification.

To register as an assessor, the following are required:

- Detailed documentary proof of relevant Qualification/s, practical training completed, and experience gained;
- NQF recognised assessor unit standard.

Assessors should keep the following general principles in mind when designing and conducting assessments:

- Focus the initial assessment activities on gathering evidence in terms of the main outcomes expressed in the titles of the Unit Standards to ensure assessment is integrated rather than fragmented. Remember that the learner needs to be declared competent in terms of the Qualification purpose and exit level outcomes;
- Where assessment across Unit Standard titles or at Unit Standard title level is unmanageable, then focus assessment around each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment;
- Make sure evidence is gathered across the entire range, wherever it applies.

In particular, assessors should assess that the learner demonstrates an ability to consider a range of options by:

- Measuring the quality of the observed practical performance as well as the theory and underpinning knowledge;
- Using methods that are varied to allow the learner to display thinking and decision making in the demonstration of practical performance;
- Maintaining a balance between practical performance and theoretical assessment methods to ensure each is measured in accordance with the level of the Qualification;
- Taking into account that the relationship between practical and theoretical components is not fixed, but varies according to the type and level of Qualification.

All assessments should be conducted in line with the following well-documented principles:

- **Appropriate:** The method of assessment is suited to the performance being assessed;
- **Fair:** The method of assessment does not present any barriers to achievements, which are not related to the evidence;
- **Manage:** The methods used make for easily arranged cost-effective assessments that do not unduly interfere with learning;
- **Integrate into work or learning:** Evidence collection is integrated into the work or learning process where this is appropriate and feasible;
- **Valid:** The assessment focuses on the requirements laid down in the standards; i.e. the assessment is fit for purpose;
- **Direct:** The activities in the assessment mirror the conditions of actual performance as close as possible;
- **Authentic:** The assessor is satisfied that the work being assessed is attributable to the learner being assessed;
- **Sufficient:** The evidence collected establishes that all criteria have been met and that performance to the required Standard can be repeated consistently;
- **Systematic:** Planning and recording is sufficiently rigorous to ensure that assessment is fair;
- **Open:** Learners can contribute to the planning and accumulation of evidence. Learners for assessment understand the assessment process and the criteria that apply;
- **Consistent:** The same assessor would make the same judgement again in similar circumstances. The judgement made is similar than the judgement that would be made by other assessors.

Learning components

Component	Level 4			Level 5			Level 6		
	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits
Fundamental	Read and write Grade 1 (Uncontracted) Braille	4	12						
	Present information in report format (110023)	4	6						
	Apply self management concepts (14048)	4	3						
		4	21						
Core	Facilitate optimal functioning for persons experiencing visual barriers in controlled environments	4	15	Map aspects of the environment for persons experiencing visual barriers	5	15	Complete a research assignment (10301)	6	20
	Conduct basic lay counselling in a structured environment (114478)	4	15	Orientate self to the environment whilst experiencing a visual barrier	5	10			
	Conduct advocacy campaigns and workshops in development practice (110056)	4	12	Travel through environments whilst experiencing a visual barrier	5	15			
	Demonstrate an understanding of issues affecting people with special needs (8570)	4	4	Facilitate travelling through environments for people experiencing a visual barrier	5	15			
				Develop learning strategies for facilitation of learning for people experiencing a visual barrier	5	15			
				Guide and support learners (9932)	5	12			
				Conduct research and liaison relevant to the learning situation (10292)	5	10			
				Establish a community resource project (14800)	5	20			
				Design, implement and follow up on internal assessment for adult learners (10291)	5	12			
				Demonstrate an understanding of professional values and ethics (8648)	5	4			

Component	Level 4			Level 5			Level 6		
	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits
				Enhance visual functioning of persons with low vision to improve quality of life	5	12			
		4	46		5	140		6	20
Elective	Demonstrate an understanding of an entrepreneurial profile (114598)	4	5	Identify and respond to learners with special needs and barriers to learning (10294)	5	10			
	Plan strategically to improve business performance (114585)	4	4	Facilitate the development of quality of life skills of children experiencing visual barriers	5	20			
	Produce business plans for a new venture (114592)	4	8						
	Research the viability of new venture ideas/opportunities (114596)	4	5						
		4	22		5	30			

New Unit Standards and their Specific Outcomes: National Diploma in Orientation and Mobility Practice (NQF Level 5)

Unit Standard Title: Read and write Grade 1 (Basic) Braille. NQF Level 4, 15 credits

Specific Outcome 1: Source Braille equipment best suited to the purpose

Specific Outcome 2: Read Grade 1 Braille

Specific Outcome 3: Write Grade 1 Braille

Specific Outcome 4: Edit written Grade 1 Braille text

Unit Standard Title: Map aspects of the environment for persons who are blind or partially sighted. NQF Level 5, 15 credits

Specific Outcome 1: Use maps to travel routes

Specific Outcome 2: Identify needs of people who are blind or partially sighted in order to enhance mobility

Specific Outcome 3: Plan maps optimally suited to persons who are blind or partially sighted

Specific Outcome 4: Construct maps that optimally guide persons who are blind or partially sighted

Specific Outcome 5: Evaluate the effectiveness of maps in relation to purpose

Unit Standard Title: Orientate self to the environment whilst experiencing a visual barrier. NQF Level 5, 10 credits

Specific Outcome 1: Assess factors needed to orientate self in space

Specific Outcome 2: Integrate sensory information received from the environment

Specific Outcome 3: Interpret environmental information in order to orientate self

Specific Outcome 4: Orientate self through controlled environments

Unit Standard Title: Travel through environments whilst experiencing a visual barrier. NQF Level 5, 15 credits

Specific Outcome 1: Use sighted guide (SG) techniques for mobility

Specific Outcome 2: Employ techniques for travel without mobility aids

Specific Outcome 3: Use a long cane for mobility in indoor and outdoor environments

Specific Outcome 4: Use various strategies for daily living while experiencing a visual barrier

Unit Standard Title: Facilitate optimal functioning for persons who are blind or partially sighted in controlled environments. NQF Level 4, 15 credits

Specific Outcome 1: Describe the demands placed on a practitioner in order to facilitate independence of persons who are blind or partially sighted

Specific Outcome 2: Facilitate the functioning of persons who are blind or partially sighted

Specific Outcome 3: Function as a sighted guide for persons who are blind or partially sighted

Specific Outcome 4: Facilitate orientation through controlled environments

Specific Outcome 5: Facilitate travel without assistive devices through controlled environments for persons who are blind or partially sighted

Specific Outcome 6: Facilitate independent living within controlled environments for persons who are blind or partially sighted

Specific Outcome 7: Access support for persons who are blind or partially sighted

Unit Standard Title: Facilitate travelling through environments for people experiencing a visual barrier. NQF Level 5, 15 credits

Specific Outcome 1: Facilitate the use of orientation methods to assist travel through the environment without assistive devices

Specific Outcome 2: Facilitate the use of assistive devices whilst travelling with sighted guides

Specific Outcome 3: Facilitate the use of long canes for mobility in indoor and outdoor environments

Specific Outcome 4: Modify learning techniques to address the needs of persons who are blind or partially sighted

Specific Outcome 5: Facilitate the integration of orientation and mobility skills for independent travel through complex environments

Unit Standard Title: Enhance visual functioning of persons with low vision to improve quality of life. NQF Level 5, 12 credits

Specific Outcome 1: Identify needs of persons with low vision

Specific Outcome 2: Select and apply techniques to enhance the use of residual vision

Specific Outcome 3: Modify environments to enhance the use of residual vision

Specific Outcome 4: Facilitate the integration of skills to enhance the use of residual vision with independent travel through complex environments

Unit Standard Title: Develop learning strategies for facilitation of learning for people experiencing a visual barrier. NQF Level 5, 15 credits

Specific Outcome 1: Assess learning resources available to prepare for the implementation of learning strategies

Specific Outcome 2: Employ learning strategies to enable persons who are blind or partially sighted to learn

Specific Outcome 3: Evaluate the effectiveness of learning strategies for persons who are blind or partially sighted

Specific Outcome 4: Evaluate and report on the learning potential of persons who are blind or partially sighted

Unit Standard Title: Facilitate the development of quality of life skills of children who are blind or partially sighted. NQF Level 5, 20 credits

Specific Outcome 1: Recognise current competence, emotional state and areas of potential of children who are blind or partially sighted

Specific Outcome 2: Motivate children to acquire orientation and mobility competencies

Specific Outcome 3: Facilitate the acquisition of orientation and mobility competencies in children who are blind or partially sighted

Specific Outcome 4: Facilitate the acquisition of learning strategies in children who are blind or partially sighted

No. 1269

2 November 2004



SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In order to proceed with the recognition of Standards Generating Bodies in terms of Government Regulations 19(1)(c) and 22(2) of 28 March 1998, National Standards Body 06, Manufacturing, Engineering and Technology, invites public comment with respect to *the acceptability of the nominees and the representativeness of the key education and training stakeholder interest groups* listed as SGB applicants below.

In addition, the NSB invite submissions from interested parties wishing to serve on such an SGB. Interested parties should take note of the section on SGB Information below.

All nominations/ applications should be accompanied by curricula vitae.

More information regarding this application may be obtained on the SAQA website or from the SAQA offices.

Comment should reach the NSB at the address below by not later than **28 November 2004**. All correspondence should be marked **SGB for Telecommunications** and be addressed to:

The Director: Standards Setting and
Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 431-5144
e-mail: dmpthuthing@saqa.co.za

SGB INFORMATION

As a necessary step in the development and implementation of the National Qualifications Framework, The National Standards Bodies are briefed [regulation 19(1)(c) of 28 March 1998] to recognise or establish Standards Generating Bodies (SGBs).

SGBs shall:

- a. generate standards and qualifications in accordance with the Authority requirements in identified sub-fields and levels;
- b. update and review standards;
- c. recommend standards and qualifications to National Standards Bodies;
- d. recommend criteria for the registration of assessors and moderators or moderating bodies; and

- e. perform such other functions as may from time-to-time be delegated by their National Standards Body.

Any bodies wishing to nominate representatives, make application to serve on, or make any other submission with regard to the above SGB should note the following information.

SGBs should be composed of organisations, which shall be key education and training stakeholder interest groups and experts in the sub-field. The NSB, when making its final decisions will have due regard for, among other things, *'the need for representativeness and equity, redress and relevant expertise in terms of the work of the SGBs.'*

Organisations proposing to nominate persons to SGBs should be sensitive to the need for **equity** and **redress**, and shall nominate persons who-

- (a) will be able to consider issues of productivity, fairness, public interest and international comparability as related to education and training in the sub-field;
 - (b) enjoy credibility in the sub-field in question, who enjoy respect; have the necessary expertise and experience in the sub-field and have the support or backing of the nominating body;
 - (c) are able to advocate and mediate the needs and interests of all levels within the sub-field covered by the Standards Generating Body;
 - (d) are able to exercise critical judgement at a high level; and
 - (e) are committed to a communication process between the Standards Generating Body, the National Standards Body and the Constituency.
-

**PUBLIC NOTICE BY NSB 06, MANUFACTURING, ENGINEERING AND TECHNOLOGY TO
RE-REGISTER THE STANDARDS GENERATING BODY FOR TELECOMMUNICATIONS**

NSB 06 wish to re-register an SGB for Telecommunications for a period of three years, from 29 October 2004 to 28 October 2007.

BRIEF OF THE SGB

1. Develop learning pathways for potential qualifications and unit standards in the sub-field Manufacturing and Assembly, from level 1 to 8 in the areas of:
[Regulation 24(1)(e)]
 - National Certificate: Telecommunications at NQF Level 4
 - National Diploma: Telecommunications at NQF Level 5
 - National Certificate: Transmission Mediums at NQF Level 4
 - National Diploma: Telecommunication Regulations at NQF Level 5
 - National Certificate and/or Diploma Subscriber Terminal Technology at NQF Level 1 to 5
 - National Certificate and/or Diploma Transmission Mediums at NQF Level 1 to 5
 - National Certificate and/or Diploma Switching Technology at NQF Level 1 to 5
 - National Certificate and/or Diploma Telecommunications Regulations at NQF Level 1 to 5
 - National Certificate and/or Diploma Telecommunications Services at NQF Level 1 to 5
2. Generate the following qualifications in accordance with Authority requirements, for NQF levels 1 to 8:
[Regulation 24(1)(a)].
 - National Certificate: Basic Telecommunications at NQF Level 2
 - National Certificate: Basic Telecommunications at NQF Level 3
 - National Diplomas: Telecommunications Technology Planning at NQF Level 5
 - National Certificate: Telecommunications at NQF Level 4
 - National Diploma: Telecommunications Technologies at NQF Level 5
 - National First Degree: Telecommunications Management and Design at NQF Level 6
 - Masters Degree: Telecommunications Management and Design at NQF Level 7
 - Doctorate: Telecommunications Management and Design at NQF Level 8
3. Recommend the standards and qualifications generated under 2 to the National Standards Body *[Regulation 24(1)(c)]*.
4. Recommend criteria for the registration of assessors and moderators or moderating bodies *[Regulation 24(1)(d)]*.
5. Review these qualifications and unit standards and effect the necessary changes *[Regulation 24(1)(b)]*.
 - National Certificate in Telecommunications for Customer Premises Equipment at NQF Level 2
 - Certificate in Telecommunications for Customer Premises Equipment at NQF Level 3
 - National Certificate in Telecommunications for Customer Premises Equipment at NQF Level 4

Maintain liaison, during the process of developing standards and qualifications, with other related Standards Generating Bodies such as those for Engineering and Electronics, Information Systems etc, as and when directed by NSB06. [Regulation 24(1)(e)].

COMPOSITION OF THE SGB

Nominee	Workplace	Nominating Body	Experience/Qualifications
1. De Lange, HW	SA Police Service	SA Police Service	National Technical Diploma plus 16 years experience in training radio technicians for the SAPS.
2. Jacobson, E	MTN	MTN	Higher Education Diploma and National Diploma: Electrical Engineering with 21 years experience in the Telecommunications industry.
3. H. Smit	Telkom	Solidarity Union	BA Education, HED, Customer care background, 7 years Union Representation.
4. Pieterse, J	Telkom	Telkom	NHD Post school education. NTD (Telecommunications). Lecturing 16 years including 6 years Instructional Design.
5. Ntsoane, N	Vodacom	Vodacom	Btech: HR Management, 4 years experience in Training and Call Centre environment.
6. Wilson, M	UNISA	UNISA	Masters in International Communications plus 6 years experience in Telecommunications.
7. Gerber, R	Department Of Communication	Department Of Communication	BSc Electrical Engineering, Certified Knowledge Manager. 10 years experience in the Information Technology field.
8. Hattingh, W.	Sentech	Sentech	Higher National Diploma in Electrical Engineering (L/C) with 10 years experience in Telecommunications.
9. Ntuluki, VJ	Telkom	Union (Communication Workers Union))	Certificate in Telecommunications, 14 years experience.
10. Botes E.	Communications Cabling Association of Southern Africa	Communications Cabling Association of Southern Africa	BICSI Master Instructor, RCDD/LAN Specialist. 20 years Telecommunications industry.
11. de Kok A.	Alcatel	Alcatel	Diploma in Telecommunications, 17 years Telecommunications experience.

12. Khosa J	Vodacom	Vodacom	BA (Hon's) information sciences, Masters Diploma in Human Resources Management. 5 years aviation experience.
13. Fourie D	Telkom	Telkom	National Technical Diploma, National Higher Education Diploma, 24 years Telecommunications experience, 21 years training background.
14. van der Vyver N	Siemens	Siemens	National Diploma Electrical Engineering, currently performing standards generating functions for Siemens
15. Ntsoyana C	CellC	CellC	N.Dip. Electrical Engineering, 11 years in Telecommunications
16. Snyman M	Telkom	Telkom	BA Psychology, 16 lecturing/design experience, 6 years Telecommunications experience.
17. De Beer du Toit	Tshwane University of Technology	Committee of Technikon Principals	10 years experience lecturing in Telecommunications
18. Neveling, NJ	Technisa	Technisa	Dept. of Education. 31 years experience in Telecommunications including 14 in training and course development
19. Singh, AE	Siemens	Siemens	10 years experience in electronics, including background in training
20. Dickason G	Ericsson	Ericsson	Certificate in Electrical engineering. 8 years in Telecommunications 20 years in training.
21. Carney G	Netstar	Netstar	National Diploma in radio communications, 32 years in communication.

No. 1270

2 November 2004



Established in terms of Act 58 of 1995

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Wholesale and Retail

Registered by NSB 11, Services, publishes the following qualifications and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualifications and unit standards upon which qualifications are based. The qualifications and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum, 1067 Arcadia Street, Hatfield.

Comment on the unit standards should reach SAQA at the address ***below and no later than 28 November 2004***. All correspondence should be marked **Standards Setting – SGB for Wholesale and Retail** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431 5144

e-mail: mmphuthing@saga.co.za

JOE SAMUELS

DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL CERTIFICATE IN WHOLESALE AND RETAIL CREDIT CONTROL
NQF LEVEL 4**

1. **Field:** Services
2. **Sub-field:** Retail and Wholesale
3. **Level:** 4
4. **Credits:** Minimum of 125
5. **Issue date:**
6. **Review date:**
7. **Rationale for the Qualification**

South Africa has a well-developed and extensive Wholesale & Retail industry, which is spread nationally.

It is estimated that all those individuals who deal with credit in the Wholesale and Retail Sector will require elements of the proposed Qualification.

The Certificate in Wholesale and Retail Practice (WARP), NQF Level 4, is designed to meet the needs of the learners who are already employed and involved in the Wholesale and Retail field. Learners with a qualification up to level 3, including through RPL, who wish to pursue a career in this area, or in fields where this learning may be useful will be allowed access to this certificate. This furthermore includes adult learners who want to enter the arena or develop their careers in one or more of the related sub-fields. Since this Certificate is part of a learning pathway it will allow mobility to persons operating at any level in the field.

The development of competence in this field will lead to world-class service delivery and company longevity. Application of the learning achieved in completing this qualification

will also assist persons to enter other industries where they will be able to apply this learning in a different context.

This qualification also reflects some of the needs of the Wholesale and Retail Sector both now and in the future. It gives accessibility and flexibility to learners employed at the appropriate level desiring learning and growth opportunities, as well as the self-employed. In addition, many of those planning to develop to higher levels, or entering an organisation at a higher level, may well want to, or be required to, complete learning at this level.

The added value of the skills, knowledge and understanding developed by the Certificate will be evidenced by greater productivity resulting from the improved performance by the learner, due to the integration of the learning which will have taken place in the workplace.

8. Purpose of the Qualification

This qualification is a further step in a learning pathway that underpins a career in the Wholesale and Retail arena, and helps the progression for a career path within an organisation. This qualification is rooted in actual practice and the learner is expected to be part of a public or private organisation and/or company operating in the area.

The Certificate will form part of a learning pathway that currently stretches from NQF Levels 2 to 5. This pathway will culminate in a qualification at NQF Level 5 with the prospect of a management position within an organisation.

Specifically, the purpose of this Certificate qualification is to equip learners to understand and acquaint themselves with the principles of credit control within the Wholesale & Retail sector and to provide career paths with associated learnerships through various levels and areas of the Wholesale and Retail environment. The Certificate further aims to build capacity and improve skills levels in the Wholesale and Retail sector thus ensuring the development of competence in this field.

The qualification provides learners with greater competence in the credit arena within the Wholesale and Retail Sector. This will enable them not only to understand the South

African context of the sector but also to underpin the ability to use this learning in various business environments.

9. Level, credits and learning components assigned to the Qualification

The certificate is made up of a planned combination of learning outcomes that have a defined purpose and will provide qualifying learners with applied competence and a foundation for further learning.

The Qualification is made up of Unit Standards classified as Fundamental, Core and Elective. A minimum of 125 credits is required to complete the Qualification.

In this Qualification the credits are allocated as follows:

Fundamental	56 credits	44 %
Core	54 credits	43 %
Elective	15 credits	13 %

Table showing spread of Unit Standard credits across NQF levels in Fundamental, Core and Elective Components

Component	Level 3	Level 4	Level 5	Total
Fundamental	20	36	0	56
Core	0	31	23	54
Elective	0	43	0	43 Min 15
Total	20	109	23	153 Min 125

Table indicating the Unit Standards contained in the Fundamental, Core and Elective Components of the National Certificate in Wholesale and Retail Practice: Level 4

NLRD NUMBER	TITLE	LEVEL	CREDITS
Fundamental Component			
First Language			
8974	Engage in sustained oral communication and evaluate spoken texts	4	5
8975	Read, analyse and respond to a variety of texts	4	5
8976	Write for a wide range of contexts	4	5
12155	Apply comprehension skills to interact written texts in the business environment	4	5
Second Language			
8968	Accommodate audience and context needs in oral communication	3	5
8969	Interpret and use information from texts	3	5
8970	Write texts for a range of communicative contexts	3	5
9303	Communicate verbally with clients in a financial services environment	3	3
9302	Access information in order to respond to client enquiries in a financial services environment	3	2
Mathematics			
7483	Solve problems involving sequences and series in real and simulated situations	4	4
9014	Use mathematics to investigate and monitor the financial aspects of personal, business and national issues	4	6

9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	4	6
Total for Fundamental Component			56
Core Component			
	Manage cash handling practices	5	15
	Promote and control credit	4	5
	Address defaulting customer accounts and manage bad debt	4	10
	Supervise credit procedures	4	8
	Assess and finalise credit applications	5	8
	Control credit administration in the Wholesale and Retail organisation	4	8
Total for Core Component			54
Elective Component			
10981	Supervise work units to achieve work objectives	4	12
11473	Manage individual and team performance	4	8
14667	Describe and apply the management functions of the organisation	4	6
13944	Describe the relationship of junior management to the general management function	4	5
13951	Demonstrate knowledge and understanding of the Occupational Health and Safety Act 85 of 1993 (OHSA) (as amended) and the responsibilities of management in terms of the Act	4	4
13952	Demonstrate basic understanding of the primary labour legislation that impacts on a business unit	4	8

Total for Elective Component	43 min 15
TOTAL FOR QUALIFICATION	153 min 125

10. Access to the Qualification

There is open access to any learner who is employed in the Wholesale and Retail sector, or who is able to arrange for assessment of the Wholesale and Retail sector specific Unit Standards and exit level outcomes to be assessed in a Wholesale and Retail sector work environment.

There are no restrictions to access, as pre-requisite qualification can be achieved through learning or experience (RPL). No learner or class of learner may be discriminated against with relation to this Certificate.

11. Learning assumed to be in place

Learners starting to access this qualification will have demonstrated competence against the relevant Numeracy and Literacy standards at NQF Level 3, either through a previous qualification, or through the process of Recognition of Prior Learning, which assesses workplace-based experiential learning.

12. Exit level Outcomes and Associated Assessment Criteria

Qualifying learners will be able to:

1. FUNDAMENTAL

- 1.1. Apply comprehension skills to first language oral and written texts in the business environment

Associated assessment criteria

- Spoken text can be responded to, analysed and evaluated
- A variety of texts are read, analysed and responded to
- Texts are written and edited effectively and creatively
- Information from written texts can be recalled, reorganised, summarised and evaluated

- 1.2. Communicate orally and in writing (in second language) in a W&R environment

Associated assessment criteria

- Audience and context needs can be accommodated in oral communications
- Information from texts can be interpreted and used
- Text can be written for a range of communicative contexts
- Information can be shared and responded to verbally
- Documents can be accessed, read and interpreted in terms of specific details

- 1.3. Apply knowledge of mathematics and statistics to investigate, interrogate and solve life-related and financial problems

Associated assessment criteria

- Problems involving sequences and series can be solved
- The financial aspects of personal, business and national issues can be investigated
- Knowledge of statistics and probability can be applied to interrogate life-related problems

2. CORE

2.1. Manage cash handling practices

Associated assessment criteria

- Cash handling practices are managed as per the cash handling policies and procedures of the organisation
- Security of cash is managed
- Cash reconciliation is verified

2.2. Supervise credit functions and procedures within a Wholesale and Retail environment

Associated assessment criteria

- The promotion of credit by the team is monitored
- Credit application information is checked and verified in order to facilitate the credit granting process
- Appropriate policies, procedures and standards are implemented and monitored in order to address defaulting customer accounts
- Appropriate persons, departments or organisations are liaised with in order to circumvent default payments
- Credit applications are assessed, validated and decided upon

2.3. Control credit administration in the Wholesale and Retail environment

Associated assessment criteria

- Administration documentation is analysed and verified
- Discrepancies appearing on the administration documentation are resolved
- The finalisation of administration documentation is supervised and managed

3. ELECTIVE

3.1. Supervise and manage Individuals and teams to achieve work objectives

Associated assessment criteria

- Team processes are planned, organised, allocated and evaluated
- Performance goals, measures and development plans are formulated, monitored and evaluated

3.2. Describe and apply the management functions of the organisation, with specific emphasis on the relationship between junior and general management

Associated assessment criteria

- The management process and basic management activities are described
- The tasks required of managers are identified and explained
- The relationships between the various basic elements of the management function is explained
- The role of management, including junior managers and line managers, in directing a business operation is explained

3.3. Describe and apply the basic legislation that impacts on a business unit

Associated assessment criteria

- The requirements for minimum compliance as stipulated in the Occupational Health and Safety Act are explained
- The obligation of managers in terms of controls, communication, training and record-keeping to achieve OHSA compliance are explained
- The legislation that regulates employment issues, specifically the Labour Relations Act, is understood and explained

- An understanding of the Employment Equity Act (EEA) as it applies in a business, the Skills Development Act (SDA), Skills Development Levies Act (SDLA) and aspects of the Basic Conditions of Employment Act (BCEA) are demonstrated

Table showing the spread of Critical Cross-field Outcomes across the Unit Standards that are classified as Core for the purpose of this Qualification :

Unit Standard Title	Critical Cross-field Outcomes supported by the Unit Standard							
	Solve problems	Team work	Organisation	Information	Communication	Technology	Related systems	Personal development
Core								
Manage cash handling practices	X	X	X	X	X		X	X
Promote and control credit	X	X	X	X	X	X		X
Address defaulting customer accounts and control bad debt	X			X	X	X	X	
Supervise credit procedures		X	X	X	X	X		
Assess and finalise credit applications	X			X	X	X	X	X
Control credit administration in the Wholesale and Retail organisation	X	X	X		X	X	X	X

13. International Comparability

This Qualification has been benchmarked against international practice in Wholesale and Retail. However, it needs to be recognised that this Qualifications is explicitly placed within the South African context.

The following list of qualifications relate to the National Certificate : Wholesale and Retail Sales Practice.

- National Certificate in Retail (NQF0995) – New Zealand
- National Certificate in Credit Management (NQF0776) – New Zealand
- C & G Level 3 Certificate in Retailing (100/3524/2) – UK
- Certificate IV in Retail Management (WRR 40102) – Australia

Although a search was done for retail qualifications in Namibia, Zimbabwe and Nigeria, there were no results.

14. Integrated Assessment

Integrated assessment at this level will evaluate the learner's ability to combine actions and ideas across a range of activities and knowledge areas. The integrated assessment must specifically assess the learner's ability to :

- demonstrate competence by means of the practical application of the embedded knowledge in a manner that meets the required performance standards required,
- illustrate a clear understanding of the concepts, theory and principles that underpin the practical action taken

The assessment will require assessment methods, which measure and evaluate evidence generated during on-the job activities into account. Because assessment practices must be open, transparent, fair, valid and reliable; ensuring that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

A variety of methods must be used in assessment and tools and activities must be appropriate to the context in which the learner is working or will work. Where it is not possible to assess the learner in the workplace simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

The term integrated assessment implies that theoretical and practical components should be assessed together. Whenever possible the assessment of knowledge, skills, attitudes and values shown in the Unit Standards should be integrated and, during integrated assessment, the assessor should make use of a range of formative and summative assessment tools and methods. Combinations of practical, applied, foundational and reflective competencies should be assessed. Assessment should further ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated in an integrated way.

Assessors must assess and give credit for the evidence of learning that has already been acquired through formal, informal and non-formal learning and work experience as the assessment process is capable of being applied to RPL, subject to the rules and criteria of the relevant ETQA.

15. Recognition of prior learning (RPL)

This Qualification can be achieved wholly or in part through the Recognition of Prior Learning and the Qualification may be granted to learners who have acquired the skills and knowledge without attending formal courses providing they can demonstrate competence in the outcomes of the individual Unit Standards as required by the Fundamental, Core and Elective areas stipulated in the Qualification and by the Exit Level Outcomes.

An RPL process may also be used to credit learners with Unit Standards in which they have developed the necessary competency as a result of workplace and experiential learning

RPL may also be used by learners, who are not in possession of an FETC or equivalent qualification, to gain access to the Qualification.

Learners submitting themselves for RPL should be thoroughly briefed prior to the assessment, and will be required to submit a Portfolio of Evidence in the prescribed format to be assessed for formal recognition. While this is primarily a workplace-based

Qualification, evidence from other areas of endeavour may be introduced if pertinent to any of the exit level outcomes.

16. Articulation Possibilities

This Qualification will articulate vertically with all other qualifications registered within the envisioned learning pathway (currently NQF Levels 2-5). Possibilities for horizontal articulation outside of the Wholesale and Retail environment include (for example) :

- Certificate : General Administration (ID 21043)
- Certificate : Credit Control (ID 20404)

Possibilities for vertical articulation outside of the Wholesale and Retail environment include (for example) :

- Certificate : Commerce : Credit Management (ID 21035)
- Certificate : Business Management (ID 36070)
- Certificate : General Management (ID 24342)

17. Moderation

- Anyone assessing a learner, or moderating the assessment of a learner, against this Qualification must be registered as an assessor or moderator with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the policies and guidelines for assessment and moderation of that ETQA, in terms of agreements reached around assessment and moderation between various ETQAs (including professional bodies), and in terms of the moderation guideline detailed immediately below.

- Moderation must include both internal and external moderation of assessments at all exit points of the Qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual Unit Standards as well as the integrated competence described in the Exit Level Outcomes of the Qualification.
- Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.

The options as listed above provide the opportunity to ensure that assessment and moderation can be transparent, affordable, valid, reliable and non-discriminatory.

For an applicant to register as an assessor or moderator of this Qualification the applicant needs:

- To be declared competent in all the outcomes of the National Assessor Unit Standards
- To be in possession of a relevant Qualification
- Minimum of three years practical and relevant occupational experience

18. Summary of Unit Standards not registered

Unit Standard Titles at NQF Level 4

Promote and control credit

Address defaulting customer accounts and manage bad debt

Supervise credit procedures

Control credit administration in the Wholesale and Retail organisation

Unit Standard Titles at NQF Level 5

Manage cash handling practices

Assess and finalise credit applications

Unit Standard Titles and Specific Outcomes at NQF Level 4

TITLE: Promote and control credit

SPECIFIC OUTCOMES

- Monitor the performance of individuals within the team that offer credit
- Promote credit as a form of payment in wholesale/retail
- Check and verify credit application information in order to facilitate the credit granting process

TITLE: Address defaulting customer accounts and manage bad debt

SPECIFIC OUTCOMES

- Monitor the performance of team members addressing defaulting accounts and/or dealing with bad debts
- Implement appropriate policies, procedures and standards to assist team members to deal with defaulting accounts and/or bad debts
- Monitor and report on status regarding targets and service standards
- Deal effectively with account holders and/or team members to circumvent default payments and bad debt
- Liaise with appropriate persons, departments or organisations

TITLE: Supervise credit procedures

SPECIFIC OUTCOMES

- Monitor the performance of team members working with customer/staff accounts
- Implement appropriate policies, procedures and standards to assist team members

- Monitor and report on status regarding targets and service standards
- Liaise with appropriate persons, departments or organisations

TITLE: Control credit administration in the Wholesale and Retail organisation

SPECIFIC OUTCOMES

- Analyse and verify administration documentation.
- Resolve identified discrepancies appearing on the administration documentation.
- Control the finalisation of administrative documentation.
- Control the administration of credit accounts

Unit Standard Titles and Specific Outcomes at NQF Level 5

TITLE : Manage cash handling practices

SPECIFIC OUTCOMES

- Manage cash handling practices
- Manage security of cash
- Verify cash reconciliation

TITLE : Assess and finalise credit applications

SPECIFIC OUTCOMES

- Assess and validate the credit application and supporting documentation for credit consideration purposes
- Evaluate and make recommendation and/or decision on the credit application
- Finalise and communicate credit decision following organisation specific requirements

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL CERTIFICATE IN WHOLESALE AND RETAIL OPERATIONS
SUPERVISION****NQF LEVEL 4**

1. **Field:** Services
2. **Sub-field:** Retail and Wholesale
3. **Level:** 4
4. **Credits:** Minimum of 135
5. **Issue date:**
6. **Review date:**
7. **Rationale for the Qualification**

South Africa has a well-developed and extensive Wholesale & Retail industry, which is spread nationally.

It is estimated that all those individuals who are wishing to enter the supervisory management level in the Wholesale and Retail Sector will benefit from the proposed Qualification.

The Certificate in Wholesale and Retail Operations Supervision, NQF Level 4, is designed to meet the needs of the learners who are already employed and involved in the Wholesale and Retail field. Learners with a qualification up to level 3, including through RPL, who wish to pursue a career in this area, or in fields where this learning may be useful will be allowed access to this certificate. This furthermore includes adult learners who want to enter the arena or develop their careers in one or more of the related sub-fields. Since this Certificate is part of a learning pathway it will allow mobility to persons operating at any level in the field.

The development of competence in this field will lead to world-class service delivery and company longevity. Application of the learning achieved in completing this qualification

will also assist persons to enter other industries where they will be able to apply this learning in a different context.

This qualification also reflects some of the needs of the Wholesale and Retail Sector both now and in the future. It gives accessibility and flexibility to learners employed at the appropriate level desiring learning and growth opportunities, as well as the self-employed. In addition, many of those planning to develop to higher levels, or entering an organisation at a higher level, may well want to, or be required to, complete learning at this level.

The added value of the skills, knowledge and understanding developed by the Certificate will be evidenced by greater productivity resulting from the improved performance by the learner, due to the integration of the learning which will have taken place in the workplace.

8. Purpose of the Qualification

This qualification is a further step in a learning pathway that underpins a career in the Wholesale and Retail arena, and helps the progression for a career path within an organisation. This qualification is rooted in actual practice and the learner is expected to be part of a public or private organisation and/or company operating in the area.

The Certificate will form part of a learning pathway that currently stretches from NQF Levels 2 to 5. This pathway will culminate in a qualification at NQF Level 5 with the prospect of a management position within an organisation.

Specifically, the purpose of this Certificate qualification is to equip learners to understand and acquaint themselves with the principles of supervision and team leadership within the Wholesale & Retail sector and to provide career paths with associated learnerships through various levels and areas of the Wholesale and Retail environment. Supervision in this context includes all activities ensuring the achievement of desired results and the correct implementation of prescribed policies, procedures and activities. The Certificate thus aims to build capacity and improve skills at lower management level in the Wholesale and Retail sector thus ensuring the development of competence and increased service delivery in this field.

The qualification provides learners with greater competence in people management within the Wholesale and Retail Sector.

9. Level, credits and learning components assigned to the Qualification

The certificate is made up of a planned combination of learning outcomes that have a defined purpose and will provide qualifying learners with applied competence and a foundation for further learning.

The Qualification is made up of Unit Standards classified as Fundamental, Core and Elective. A minimum of 135 credits is required to complete the Qualification.

In this Qualification the credits are allocated as follows:

Fundamental	56 credits	41 %
Core	62 credits	46 %
Elective	17 credits	13 %

Table showing spread of Unit Standard credits across NQF levels in Fundamental, Core and Elective Components

Component	Level 3	Level 4	Total
Fundamental	20	36	56
Core	4	58	62
Elective	6	35	41 Min 17
Total	30	129	159 Min 135

Table indicating the Unit Standards contained in the Fundamental, Core and Elective Components of the National Certificate in Wholesale and Retail Operations Supervision : Level 4

NLRD NUMBER	TITLE	LEVEL	CREDITS
Fundamental Component			
First Language			
8974	Engage in sustained oral communication and evaluate spoken texts	4	5
8975	Read, analyse and respond to a variety of texts	4	5
8976	Write for a wide range of contexts	4	5
12155	Apply comprehension skills to interact written texts in the business environment	4	5
Second Language			
8968	Accommodate audience and context needs in oral communication	3	5
8969	Interpret and use information from texts	3	5
8970	Write texts for a range of communicative contexts	3	5
9303	Communicate verbally with clients in a financial services environment	3	3
9302	Access information in order to respond to client enquiries in a financial services environment	3	2
Mathematics			
7483	Solve problems involving sequences and series in real and simulated situations	4	4
9014	Use mathematics to investigate and monitor the financial aspects of personal, business and national issues	4	6
9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	4	6

Total for Fundamental Component			56
Core Component			
	Supervise Sales Performance	4	8
	Supervise implementation of loss control measures	4	8
	Supervise stock counts	4	8
	Supervise customer services standards	4	8
	Supervise housekeeping and hygiene in a store	4	6
13947	Motivate a team	4	6
14667	Describe and apply the management functions of an organisation	4	6
13952	Demonstrate basic understanding of the Primary labour legislation that impacts on a business unit	4	8
13917	Indicate the role of a team leader ensuring that a team meets an organisation's standards	3	4
Total for Core Component			62
Elective Component			
	Supervise promotional activities	4	8
13911	Induct a new member into a team	3	3
13951	Demonstrate knowledge and understanding of the Occupational Health and Safety Act 85 of 1993 (OHSA) (as amended) and the responsibilities of management in terms of the Act	4	4
13941	Apply the budget function in a business unit	4	5
10388	Interpret basic financial statements	4	3
	Supervise POS operations	4	8
13914	Conduct a formal meeting	3	3
10377	Demonstrate knowledge and insight into the Compensation for Occupational Injury and Disease Act 130 of 1993	4	2
13954	Manage risk in own work/business	4	5

	environment		
Total for Elective Component			41 min 17
TOTAL FOR QUALIFICATION			159 min 135

10. Access to the Qualification

There is open access to any learner who is employed in the Wholesale and Retail sector, or who is able to arrange for assessment of the specific Wholesale and Retail sector Unit Standards and exit level outcomes in a Wholesale and Retail sector work environment.

There are no restrictions to access, as pre-requisite qualification can be achieved through learning or experience (RPL). No learner or class of learner may be discriminated against with relation to this Certificate.

11. Learning assumed to be in place

Learners starting to access this qualification will have demonstrated competence against the relevant Numeracy and First Language Literacy standards at NQF Level 3, either through a previous qualification, or through the process of Recognition of Prior Learning, which assesses workplace-based experiential learning.

12. Exit level Outcomes and Associated Assessment Criteria

Qualifying learners will be able to:

1. FUNDAMENTAL

- 1.1. Apply comprehension skills to first language oral and written texts in the business environment

Associated assessment criteria

- Spoken text can be responded to, analysed and evaluated
- A variety of texts are read, analysed and responded to
- Texts are written and edited effectively and creatively
- Information from written texts can be recalled, reorganised, summarised and evaluated

1.2. Communicate orally and in writing (in second language) in a W&R environment

Associated assessment criteria

- Audience and context needs can be accommodated in oral communications
- Information from texts can be interpreted and used
- Text can be written for a range of communicative contexts
- Information can be shared and responded to verbally
- Documents can be accessed, read and interpreted in terms of specific details

1.3. Apply knowledge of mathematics and statistics to investigate, interrogate and solve life-related and financial problems

Associated assessment criteria

- Problems involving sequences and series can be solved
- The financial aspects of personal, business and national issues can be investigated
- Knowledge of statistics and probability can be applied to interrogate life-related problems

2. CORE

2.1. Supervise stock counts and sales performance

Associated assessment criteria

- Stock counts are planned and staff are prepared for stock counts
- The counting process and post-stock procedures are supervise
- The effect of sales on the Net Profit of the business is explained
- Sales performance is monitored and actions to improve sales are proposed

2.2. Supervise housekeeping and loss control measures

Associated assessment criteria

- Health and safety legislation is applied within the Wholesale and Retail outlet
- Fixed asset maintenance is monitored as per organisational policies and procedures
- Hygiene standards are maintained
- The effects of shrinkage and losses on the organisation are identified
- Actions to minimise losses, including losses that occur through shoplifting, are implemented

2.3. Supervise customer service standards

Associated assessment criteria

- Customer service standards are identified and evaluated in terms of existing service delivery
- Action plans to improve service delivery are developed, communicated, implemented and evaluated
- The handing of queries and complaints is monitored and evaluated against organisational requirements

2.4. Describe and apply team leadership and team motivation

- The role of a leader within a team or group is understood
- The achievement of group objectives and goals is monitored
- Motivational theories and techniques are applied
- Team achievements are recognised and team members are empowered

2.5. Describe and apply the management functions of an organisation, including an understanding of Primary Labour Legislation

- The basic activities involved in the management process are applied
- The tasks required of managers are identified
- The decision making process is applied
- The legislation that regulates employment issues, specifically the Labour Relations Act, is understood and explained
- The Basic Conditions of Employment Act and Employment Equity Act are understood and explained
- The Skills Development Act, Skills Levies Act, and the role of the SETA are understood and explained

3. ELECTIVE

3.1. Supervise promotional activities and point of sales operations

Associated assessment criteria

- Promotional activities are planned in terms of the organisation's promotion strategy
- Promotional teams are identified and supervised as per the implementation plan
- The promotional activity is evaluated against the received promotion guidelines
- Refunds, exchanges and point of sales transactions are authorised
- Staff is scheduled according to service requirements

3.2. Basic budgetary and financial requirements are applied

Associated assessment criteria

- Budget needs for a business unit are explained, monitored and controlled
- Proposed budgets can be evaluated, presented and justified
- The basic elements of an income and expenditure statement, balance sheet, and assets and liabilities statement are identified
- The evidence in financial statements is used to make financial decisions

3.3. Induct new members into teams and conduct formal meetings

Associated assessment criteria

- New members are inducted into the team and the opportunities available in the organisation are explained
- The functioning, performance standards and supervision structures of the team are explained
- Meetings are prepared for and followed up on
- Formal meetings are conducted and conflict within meetings are dealt with

3.4. Demonstrate knowledge and understanding of the Occupational Health and Safety Act and the Compensation for Occupational Injury and Disease Act, and the responsibilities of management in terms of the Acts

Associated assessment criteria

- The basic principles of the Acts and Regulations are understood
- The requirements for minimum compliance stipulated in the Acts are explained
- The aspects of the Act and Regulations applicable to a specific business are identified and interpreted into a compliance plan for the organisation
- Record keeping required by the Acts and Regulations is understood and applied
- The legal requirements as stipulated in the Acts in respect of training are explained and implemented

3.5. Manage risk in own work / business environment

Associated assessment criteria

- Quality requirements and the implications of not performing to required legislation and/or industry standards are explained with reference to the company and the individual
- Work procedures in the workplace and the risk of non-compliance are understood
- Risk is identified and measures to minimise risk for a particular procedure are evaluated

- Behaviours and attitudes that constitute positive and negative risk in the workplace are described

Table showing the spread of Critical Cross-field Outcomes across the Unit Standards that are classified as Core for the purpose of this Qualification :

Unit Standard Title	Critical Cross-field Outcomes supported by the Unit Standard							
	Solve problems	Team work	Organisation	Information	Communication	Technology	Related systems	Personal development
Supervise sales performance		X	X	X	X	X	X	
Supervise implementation of loss control measures	X	X	X		X		X	
Supervise stock counts		X		X	X	X	X	X
Supervise customer service service standards		X	X	X	X	X		X
Supervise housekeeping and hygiene in a store	X	X	X	X	X			X
Motivate a team		X			X			X
Describe and apply the management functions of an organisation	X	X	X	X	X	X	X	X
Demonstrate basic understanding of the Primary Labour Legislation that impacts on a business unit			X	X	X	X	X	X
Indicate the role of a team leader ensuring that a team meets an organisation's standards	X	X		X	X		X	X

13. International Comparability

This Qualification has been benchmarked against international practice in Wholesale and Retail. However, it needs to be recognised that this Qualifications is explicitly placed within the South African context.

The following list of qualifications relate to the National Certificate : Wholesale and Retail Operations Supervision.

- National Certificate in Retail (NQF0995) – New Zealand
- EDEXCEL Level 3 BTEC National Diploma in Retail (100/3045/1) – UK
- Certificate III in Retail Supervision (WRR 30102) – Australia

Although a search was done for retail qualifications in Namibia, Zimbabwe and Nigeria, there were no results.

14. Integrated Assessment

Integrated assessment at this level will evaluate the learner's ability to combine actions and ideas across a range of activities and knowledge areas. The integrated assessment must specifically assess the learner's ability to :

- demonstrate competence by means of the practical application of the embedded knowledge in a manner that meets the required performance standards required,
- illustrate a clear understanding of the concepts, theory and principles that underpin the practical action taken

The assessment will require assessment methods, which measure and evaluate evidence generated during on-the job activities into account. Because assessment practices must be open, transparent, fair, valid and reliable; ensuring that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

A variety of methods must be used in assessment and tools and activities must be appropriate to the context in which the learner is working or will work. Where it is not possible to assess the learner in the workplace simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

The term integrated assessment implies that theoretical and practical components should be assessed together. Whenever possible the assessment of knowledge, skills, attitudes and values shown in the Unit Standards should be integrated and, during

integrated assessment, the assessor should make use of a range of formative and summative assessment tools and methods. Combinations of practical, applied, foundational and reflective competencies should be assessed. Assessment should further ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated in an integrated way.

Assessors must assess and give credit for the evidence of learning that has already been acquired through formal, informal and non-formal learning and work experience as the assessment process is capable of being applied to RPL, subject to the rules and criteria of the relevant ETQA.

15. Recognition of prior learning (RPL)

This Qualification can be achieved wholly or in part through the Recognition of Prior Learning and the Qualification may be granted to learners who have acquired the skills and knowledge without attending formal courses providing they can demonstrate competence in the outcomes of the individual Unit Standards as required by the Fundamental, Core and Elective areas stipulated in the Qualification and by the Exit Level Outcomes.

An RPL process may also be used to credit learners with Unit Standards in which they have developed the necessary competency as a result of workplace and experiential learning

RPL may also be used by learners, who are not in possession of an FETC or equivalent qualification, to gain access to the Qualification.

Learners submitting themselves for RPL should be thoroughly briefed prior to the assessment, and will be required to submit a Portfolio of Evidence in the prescribed format to be assessed for formal recognition. While this is primarily a workplace-based Qualification, evidence from other areas of endeavour may be introduced if pertinent to any of the exit level outcomes.

16. Articulation Possibilities

This Qualification will articulate vertically with all other qualifications registered within the envisioned learning pathway (currently NQF Levels 2-5). Possibilities for horizontal articulation outside of the Wholesale and Retail environment include (for example) :

- National Certificate : Management (ID 23656)
- National Certificate : Human Resource Management and Practices Support (ID 20893)

Possibilities for vertical articulation outside of the Wholesale and Retail environment include (for example) :

- Certificate : Business Management (ID 36070)
- Certificate : General Management (ID 24342)

17. Moderation

- Anyone assessing a learner, or moderating the assessment of a learner, against this Qualification must be registered as an assessor or moderator with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the policies and guidelines for assessment and moderation of that ETQA, in terms of agreements reached around assessment and moderation between various ETQAs (including professional bodies), and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at all exit points of the Qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described

both in individual Unit Standards as well as the integrated competence described in the Exit Level Outcomes of the Qualification.

- Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.

The options as listed above provide the opportunity to ensure that assessment and moderation can be transparent, affordable, valid, reliable and non-discriminatory.

For an applicant to register as an assessor or moderator of this Qualification the applicant needs:

- To be declared competent in all the outcomes of the National Assessor Unit Standards
- To be in possession of a relevant Qualification
- Minimum of three years practical and relevant occupational experience

18. Summary of Unit Standards not registered

Unit Standard Titles at NQF Level 4

Supervise sales performance

Supervise implementation of loss control measures

Supervise stock counts

Supervise customer service standards

Supervise housekeeping and hygiene in a store

Unit Standard Titles and Specific Outcomes at NQF Level 4

TITLE: Supervise sales performance

SPECIFIC OUTCOMES

- Explain the effect of sales on the Net Profit of the business.
- Monitor sales performance.

- Propose actions to improve sales performance.

TITLE: Supervise implementation of loss control measures

SPECIFIC OUTCOMES

- Explain the effect of shrinkage and losses.
- Implement action to minimise losses in identified areas.
- Implement measure to reduce shoplifting.

TITLE: Supervise stock counts

SPECIFIC OUTCOMES

- Supervise stock count preparation
- Prepare staff for a stock count
- Oversee the counting process
- Supervise post stock count procedures

TITLE: Supervise customer service standards

SPECIFIC OUTCOMES

- Implement customer service standards in accordance with the prescribed organisational requirements
- Improve customer service standards
- Oversee the handling of customer queries and complaints

TITLE: Supervise housekeeping and hygiene in a store

SPECIFIC OUTCOMES

- Monitor the implementation of health and safety in the wholesale or retail store
- Supervise maintenance of fixed assets in a wholesale/retail store
- Monitor hygiene in a wholesale/retail store

No. 1271

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Secondary Agriculture

Registered by NSB 01, Agriculture and Nature Conservation, publishes the following unit standard for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standard upon which qualifications are based. The full unit standard can be accessed via the SAQA web site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the unit standards should reach SAQA at the address ***below and no later than 28 November 2004***. All correspondence should be marked **Standards Setting – SGB for Secondary Agriculture** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431-5144

dmphuthing@saga.co.za


JOE SAMUELS**DIRECTOR: STANDARDS SETTING AND DEVELOPMENT**



National Certificate: Cigarette Production – NQF Level 3

Field: Agriculture and Nature Conservation

Sub-field: Secondary Agriculture

NQF level: 3

Credits: 120

Rationale for the Qualification

This Qualification will allow persons currently in, or aspiring to enter the tobacco processing environment and others to obtain an integrated practical and theoretical grounding in the operation of cigarette production and the functions thereof. This will ensure a portable, nationally recognized Qualification that will:-

- Improve the quality of safety in the work environment.
- Optimally utilize resources in the production industry.
- Lead to transformation in economic growth and social development.

The typical range of learners is the currently employed, unemployed and other persons, who want to enter a learning programme to obtain a National Certificate in Cigarette Production at NQF Level 3, to continue building a career path in this industry.

Improved levels of knowledge and skills lead to greater ability to produce at more competitive costs and better quality, which will impact favorably both on the society and the economy of the country.

The learner will have demonstrated an ability to make decisions and consider a range of options after completion of the following unit standards in three specified areas:

Rules of combination

To obtain this Qualification, all fundamental and core unit standards are compulsory.

In addition, a learner must select one of the following combinations from the elective unit standards below:

(1)

- Laminate tipping material
- Apply quality control on the final product

(2)

- Apply quality control on filter rods
- Supply raw material to production machines

Access to the Qualification

There are no restrictions placed on learners which may prevent them from gaining access to this Qualification.

Purpose of the Qualification:

This Qualification is aimed at level 3 on the National Qualification Framework. It provides learners with the opportunity to obtain competence in specialised cigarette production processes and practices, namely preparing for cigarette production, maintaining the cigarette production processes, shutting down and cleaning thereof as well as quality monitoring and providing opportunity for learners to grow in this specific field.

The fundamental learning, which learners will acquire, will allow them to be able to compile verbal and written communications and perform basic calculations. This Qualification complies with the objectives of the NQF with regard to facilitating access to, mobility and progression within the Tobacco Processing Industry.

The Qualification focuses on the skills, knowledge, values and attitude required to progress further in the industry. The intention is to release the potential of people, in order for them to grow, develop and become more competent workers. This Qualification will furthermore add value to the individuals, their workplace and the economy as a whole.

Learning assumed to be in place:

The learner will have appropriate levels of Communication and Languages, Numeracy and occupational competence equivalent to grade 9 (NQF1) standards.

Exit level outcomes and associated assessment criteria

Exit level outcome

Recall and explain the basic principles, safety procedures and work ethics in the Tobacco Processing Industry in order to meet industry and work standards.

Associated Assessment Criteria

- The Tobacco Processing Industry's basic principles are interpreted and explained.
- The Tobacco Processing Industry's safety procedures are interpreted and explained.
- The Tobacco Processing Industry's work ethics are interpreted and explained.
- The Tobacco Processing Industry's quality management principles and practices are interpreted and explained.

Exit level outcome

Describe and perform the functions/duties/responsibilities required in the preparation for the cigarette production process during material supply, tobacco filling of the machines and brand change-over.

Associated Assessment Criteria

- Work site preparation procedures are identified and explained.
- Consequences of not adhering to work site procedures are explained.
- The relevant supply, filling and change-over activities are performed in accordance with standard operating procedures.
- Procedures for handling equipment and material correctly and according to safety requirements are explained and implemented.

Exit level outcome

Describe and perform the functions/duties/responsibilities required to ensure the cigarette production procedures are maintained throughout the process.

Associated Assessment Criteria

- Work site cigarette production procedures are identified and explained.
- Consequences of not adhering to work site procedures regarding cigarette rod making, filter attachment and cigarette supply to packaging are explained.
- The relevant activities are performed in accordance with standard operating procedures and quality requirements.
- Procedures for handling equipment and material correctly and according to safety requirements are explained and implemented.

Exit level outcome

Describe and perform the functions/duties/responsibilities required to ensure the shut-down procedures are adhered to.

Associated Assessment Criteria

- Prescribed work site shut-down procedures are explained and implemented according to schedule.
- Consequences of not adhering to work site shut-down procedures are explained.
- The relevant shut-down activities are performed in accordance with standard operating procedures and quality requirements.
- Procedures for handling equipment and material correctly and according to safety requirements are explained and implemented.

Exit level outcome

Explain and carry-out the functions/duties/responsibilities required to ensure the cleaning of work area and equipment according to requirements.

Associated Assessment Criteria

- Work site cleaning procedures are identified and implemented.
- Consequences of not adhering to and following work site cleaning procedures are explained.
- The relevant cleaning activities are performed in accordance with standard operating procedures, environmental, safety, health measures and quality requirements.
- Procedures for handling equipment and cleaning material correctly and according to safety requirements are explained and implemented.

Exit level outcome

Demonstrate the ability to work effectively as a member of a multi-cultural manufacturing team.

Associated Assessment Criteria

- Own particular team structure and purpose are identified and explained.
- Roles and responsibilities of each team member are identified and described.
- External and environmental factors that influence the workings and success of the team are explained and assessed.
- The ability to perform in a team is achieved and maintained.

Exit level outcome

Collect, record and retrieve production related data in accordance with work site procedures.

Associated Assessment Criteria

- Type of data required for processing is identified and explained.
- Production data is gathered, recorded and extracted according to instructions and within specified time frames.
- Consequences of not recording and extracting correct production data are explained.

Criteria for internal and external assessors

Assessors need experience in the following areas:

Interpersonal skills, subject matter and assessment.

The assessor needs to be competent in the planning and conducting assessment of learning outcomes and design and develop assessments as described in the relevant unit standards. The subject matter experience must be well developed within the field of cigarette production.

The subject matter experience of the assessor can be established by recognition of prior learning.

Assessors need to be registered with the relevant Education and Training Quality Assurance Body.

International comparability

Website benchmarking was done with Australia, Canada, New Zealand, Ireland and Scotland but none could be found. Furthermore, the International Tobacco Industry was also investigated for relevant Qualification information, but even within the Industry, nothing could be found to make Industry specific comparisons.

Therefore this could be regarded as one of the first formalized Qualifications in cigarette production.

Articulation possibilities

The generic nature of this qualification and the focus on multi-skilling will provide for portability across various sectors in the processing domain. It is envisaged that learners completing this qualification will be employable in fast moving consumers good industries, amongst others such as the sugar industry, tea processing industry and others.

It prepares the learner and form the basis for progression towards other qualifications. The qualification will enable learners to acquire recognised qualifications at different levels across a wide cross-section of skills. This will enable the individual to enter a broad spectrum of career paths and address the needs of the industry in terms of skills required for multi-skilling.

While the qualification will diverge as they progress upwards, there is enough commonality to provide for a solid base of generic skills. The learner will have multiple choices of learning paths and career paths in various technical occupations.

Integrated Assessment Criteria:

Unit standards associated with this Qualification must be used to assess specific and critical cross-field outcomes. Assessment should focus in an integrated way on determining the competence of the learner in terms of the overall purpose and title of this Qualification.

The term integrated assessment also implies that the theoretical and practical components should be assessed together and assess combinations of practical, foundational and reflective competencies.

Assessment activities should be done in real workplace situations and where simulations or role-plays are used, there should be supporting evidence to show that the learner is able to display the competencies to the real work situation.

All assessments should be conducted in line with the following documented principles of assessment: appropriateness, fairness, manageability, and integration into work of learning, validity, direct, authentic, sufficient, systematic, open and consistent.

Learners wishing to be assessed will need to provide evidence of the following:

- Verbal and written explanations of reasons for adhering to operational and work site procedures as well as statutory requirements, adhering to specific sequence of operations, identifying deviations, taking corrective actions and recording relevant data, and reporting deviations outside the jobholder's responsibility.
- Demonstrations of a range of operational actions relating to applying quality control on the cigarettes, preparing for and producing cigarettes, shutting down and cleaning a cigarette maker, conducting a cigarette brand change-over and applying general safety in the work place. Learners will also demonstrate an understanding of the Tobacco Processing Industry.
- Oral or written questioning regarding the reflexive competencies within the Qualification:

If the identifying and solving of problems, team work, organising one-self, the using of applied science, the implication of actions and reactions in the world as a set of related systems are not clear from the observation a method of oral questioning or a cases study should be applied to determine the whole person development and integration of applied knowledge and skills.

- A portfolio of evidence is required to prove the practical, foundational and reflexive competencies of the learner which may include production and quality statistics.
- Assessors and moderators should develop and conduct their own integrated assessment by making use of a range of formative and summative assessment methods. Assessors should assess and give credit for the evidence of learning that

has already been acquired through formal, informal and non-formal learning and work experience.

- Unit standards in the Qualification must be used to assess specific and critical cross-field outcomes. During integrated assessments the assessor should make use of formative and summative assessment methods and should assess combinations of practical, foundational and reflexive competencies.

Recognition of prior learning

This Qualification may be achieved in part or completely through the recognition of prior learning, which includes formal, informal and non-formal learning and work experience. Where RPL is required the learner will need to prove applied competence in that specific area in order to obtain recognition of that skill and / or knowledge.

Evidence can be presented in a variety of forms, including international or previous local Qualifications, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records. The assessment methods and tools to be used to assess Prior Learning shall be decided upon jointly by the assessor and the learner.

Moderation options

Anyone assessing a learner against these unit standards must be registered as an assessor with the relevant ETQA.

Any institution offering learning that will enable achievement of these unit standards or will assess these unit standards must be accredited as a provider with the relevant ETQA. Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against these unit standards may apply to be assessed by any assessment agency, assessor or provider institution, which is accredited by the relevant ETQA.

Qualification Matrix National Certificate: Cigarette Production – NQF Level 3

FUNDAMENTAL			CORE			ELECTIVE		
	Level	Credits		Level	Credits		Level	Credits
Demonstrate understanding of the use of different number bases and measurement units and an awareness of error in the context of relevant calculations (ID9010)	3	2	Apply quality control on cigarettes	3	10	Laminate tipping material	2	5
Use mathematics to investigate and monitor the financial aspects of personal and business issues (ID7456)	3	2	Depict basic details of the Tobacco Processing Industry	2	3	Apply quality control on the final product	3	10
Investigate life and work related problems using data and probabilities (ID9012)	3	5	Prepare cigarette maker for production	3	10	Apply quality control on filter rods	3	10
Demonstrate understanding of real and imaginary numbers and real number systems (ID14106)	3	2	Produce cigarettes	3	19	Supply raw material to production machines	2	5
Identify and work with simple forms of complex numbers (ID 7455)	3	1	Shut down a cigarette maker	3	6			
Describe, apply, analyse and calculate shape and motion in 2-and3-dimensional space in different contexts (ID9013)	3	4	Conduct a cigarette brand change-over	3	3			
Accommodate audience and context needs in oral communication (ID8968)	3	5	Clean a cigarette maker	2	5			
Interpret and use information from texts	3	5	Fill cigarette trays	2	5			

(ID8969)								
Write texts for a range of communicative contexts (ID8970)	3	5	Capture and retrieve production related data on a production machine's data processor	3	2			
Use language and communication in occupational learning programmes (ID8073)	3	5	Handle production waste	2	3			
			Operate in a team (ID8420)	2	4			
		36			70			30



Further Education and Training Certificate: Cigarette Packaging Technology at NQF Level 4

Field: Agriculture and Nature Conservation

Sub-field: Secondary Agriculture

NQF level: 4

Credits: 137

Rationale for the Qualification

This Qualification provides current learners with the opportunity to advance from the Cigarette Packaging – NQF Level 3 Qualification or for persons entering the Tobacco Processing environment and others to obtain an integrated practical and theoretical grounding in the maintaining of the cigarette packaging process and the functions thereof. This will ensure a portable, nationally recognized Qualification that will:-

- Improve the quality of safety in the work environment.
- Optimally utilize resources in the packaging industry.
- Lead to transformation in economic growth and social development.

The typical range of learners is the currently employed, unemployed and other persons, who want to enter a learning programme to obtain a National Certificate in Cigarette Packaging Technology at NQF Level 4, to continue building a career path in this industry.

Improved levels of knowledge and skills lead to greater ability to produce at more competitive costs and better quality, which will impact favorably both on the society and the economy of the country.

Purpose of the Qualification:

This Qualification is aimed at level 4 on the National Qualification Framework. It provides learners with the opportunity to obtain competence in specialised cigarette packaging process technology namely, maintaining the packaging process and equipment to improve product quality and the opportunity for learners to grow in this specific field.

The fundamental learning, which learners will acquire, will allow them to be able to compile verbal and written communications and perform basic calculations. This Qualification complies with the objectives of the NQF with regard to facilitating access to, mobility and progression within the cigarette packaging industry.

The Qualification focuses on the skills, knowledge, values and attitude required to progress further in the industry. The intention is to release the potential of people, in order for them to grow, develop and become more competent workers. This Qualification will furthermore add value to the individuals, their workplace and the economy as a whole.

Rules of combination

To obtain this Qualification, all fundamental and core unit standards are compulsory. In addition, a learner must select one of the following combinations from the elective unit standards below:

(1)

- Maintain a display bundle transfer unit
- Maintain a display unit's exit heaters
- Maintain a cigarette packer compression turret
- Maintain a cigarette packer arbor drum
- Maintain a cigarette packer stamp unit

(2)

- Maintain cigarette packer blank folding wheel
- Maintain cigarette packer inner frame unit
- Maintain cigarette packer inner liner folding wheel
- Maintain a metallised paper embossing unit

Access to the Qualification

There are no restrictions placed on learners that may prevent them from gaining access to this Qualification except those that are mentioned under learning assumed to be in place.

Purpose of the Qualification:

This Qualification is aimed at level 4 on the National Qualification Framework. It provides learners with the opportunity to obtain competence in specialised cigarette packaging process technology namely, maintaining the packaging process and equipment to improve product quality and the opportunity for learners to grow in this specific field.

The fundamental learning, which learners will acquire, will allow them to be able to compile verbal and written communications and perform basic calculations. This Qualification complies with the objectives of the NQF with regard to facilitating access to, mobility and progression within the cigarette packaging industry.

The Qualification focuses on the skills, knowledge, values and attitude required to progress further in the industry. The intention is to release the potential of people, in order for them to grow, develop and become more competent workers. This Qualification will furthermore add value to the individuals, their workplace and the economy as a whole.

Learning assumed to be in place:

It is assumed that learners wishing to enter a programme leading to this qualification have demonstrated competence in mathematical literacy, communication and languages at NQF Level 3.

Exit level outcomes and associated assessment criteria**Exit level outcome 1**

- Identify, explain and execute the functions/duties/responsibilities required in the maintenance of a packaging machine in order to sustain optimum production levels and minimize down time and product loss.

Associated Assessment Criteria

- Work site procedures and manufacture's specifications for a packaging machine are identified and explained.
- Fault finding methods and techniques for a packaging machine are applied in the establishing of functional and quality deviations.
- Machinery minor repairs, adjustments and maintenance for a packaging machine are conducted in accordance with work site procedures and manufacture's specifications
- Consequences of not adhering to work site procedures and manufacture's specifications for a packaging machine are explained.
- Environment, health and safety measures are complied with during the implementation of machinery minor repairs, adjustments and maintenance for a packaging machine.

Exit level outcome 2

- Identify, explain and execute the functions/duties/responsibilities required in the maintenance of a film wrapping machine in order to sustain optimum production levels and minimize down time and product loss.

Associated Assessment Criteria

- Work site procedures and manufacture's specifications for a film wrapping machine are identified and explained.
- Fault finding methods and techniques for a film wrapping machine are applied in the establishing of functional and quality deviations.
- Machinery minor repairs, adjustments and maintenance for a film wrapping machine are conducted in accordance with work site procedures and manufacture's specifications.
- Consequences of not adhering to work site procedures and manufacture's specifications for a film wrapping machine are explained.
- Environment, health and safety measures are complied with during the implementation of machinery minor repairs, adjustments and maintenance for a film wrapping machine.

Exit level outcome 3

- Identify, explain and execute the functions/duties/responsibilities required in the maintenance of display bundle and over wrapping machines in order to sustain optimum production levels and minimize down time and product loss.

Associated Assessment Criteria

- Work site procedures and manufacture's specifications for display bundle and over wrapping machines are identified and explained.
- Fault finding methods and techniques for display bundle and over wrapping machines are applied in the establishing of functional and quality deviations.
- Machinery minor repairs, adjustments and maintenance for display bundle and over wrapping machines are conducted in accordance with work site procedures and manufacture's specifications
- Consequences of not adhering to work site procedures and manufacture's specifications for display bundle and over wrapping machines are explained
- Environment, health and safety measures are complied with during the implementation of machinery minor repairs, adjustments and maintenance for display bundle and over wrapping machines.

Exit level outcome 4

- Identify, explain and execute the functions/duties/responsibilities required in the maintenance of a case packaging machine in order to sustain optimum production levels and minimize down time and product loss.

Associated Assessment Criteria

- Work site procedures and manufacture's specifications for a case packaging machine are identified and explained.
- Fault finding methods and techniques for a case packaging machine are applied in the establishing of functional and quality deviations.
- Machinery minor repairs, adjustments and maintenance for a case packaging machine are conducted in accordance with work site procedures and manufacture's specifications.
- Consequences of not adhering to work site procedures and manufacture's specifications for a case packaging machine are explained.
- Environment, health and safety measures are complied with during the implementation of machinery minor repairs, adjustments and maintenance for a case packaging machine.

Exit level outcome 5

- Perform scheduled production machine services to ensure serviceability and readiness for production.

Associated Assessment Criteria

- Scheduled services are planned and prepared for according to work site requirements.
- Production machines are serviced in accordance with scheduled plans.

- Services on production machines are conducted and completed in accordance with work site procedures and manufacture's specifications.
- The machine is prepared for the commencement of production in accordance with work site procedures and time frames.

Exit level outcome 6

- Demonstrate the ability to function effectively in a team comprising of multi-cultural members.

Associated Assessment Criteria

- Own particular team structure and purpose are identified and explained.
- Roles and responsibilities of each team member are identified and described.
- External (environmental) factors that influence the workings and success of the team are explained and assessed.
- The ability to perform in a team is achieved and maintained.

Criteria for internal and external assessors

Assessors need experience in the following areas:

Interpersonal skills, subject matter and assessment.

The assessor needs to be competent in the planning and conducting assessment of learning outcomes and design and develop assessments as described in the relevant unit standards. The subject matter experience must be well developed within the field of cigarette packaging.

The subject matter experience of the assessor can be established by recognition of prior learning.

Assessors need to be registered with the relevant Education and Training Quality Assurance Body.

International comparability

Website benchmarking was done with Australia, Canada, New Zealand, Ireland and Scotland but none could be found. Furthermore, the International Tobacco Industry was also investigated for relevant Qualification information, but even within the Industry, nothing could be found to make Industry specific comparisons.

Therefore this could be regarded as one of the first formalised Qualifications in cigarette packaging technology.

Integrated Assessment Criteria

Learners will produce evidence of the following:

- Verbal and written explanations of reasons for adhering to operational and work site procedures as well as statutory requirements, adhering to specific sequence of operations, identifying deviations, taking corrective actions and recording relevant data, and reporting deviations outside the jobholder's responsibility.
- Demonstrations of a range of operational actions relating to the maintaining of cigarette packaging machinery and applying general safety in the work place.

- Oral or written questioning regarding the reflexive competencies within the Qualification:

If the identifying and solving of problems, team work, organising one-self, the using of applied science, the implication of actions and reactions in the world as a set of related systems are not clear from the observation a method of oral questioning or a cases study should be applied to determine the whole person development and integration of applied knowledge and skills.

- A portfolio of evidence is required to prove the practical, foundational and reflexive competencies of the learner which may include production and quality statistics.
- Assessors and moderators should develop and conduct their own integrated assessment by making use of a range of formative and summative assessment methods. Assessors should assess and give credit for the evidence of learning that has already been acquired through formal, informal and non-formal learning and work experience.
- Unit standards in the Qualification must be used to assess specific and critical cross-field outcomes. During integrated assessments the assessor should make use of formative and summative assessment methods and should assess combinations of practical, foundational and reflexive competencies.

Recognition of prior learning (RPL)

This Qualification may be achieved in part or completely through the recognition of prior learning, which includes formal, informal and non-formal learning and work experience.

Moderation

Moderation includes internal and external moderation of assessments. Internal and external moderation systems must ensure that all assessors conduct assessments that are credible, fair, reliable, consistent, adequate and practical.

Internal and external moderation systems must provide learning opportunities that are transparent, affordable and enhancing development in the field and sub-field of the National Qualifications Framework.

The accredited provider with the relevant ETQA must be able to provide internal moderation.

External moderation will be done by the relevant ETQA.

Qualification Matrix Further Education and Training Certificate: Cigarette Packaging Technology – NQF Level 4

FUNDAMENTAL			CORE			ELECTIVE		
	Level	Credits		Level	Credits		Level	Credits
Use mathematics to investigate and monitor the financial aspects of personal, business, and national issues (ID7468)	4	2	Function in a team (ID8561)	4	3	Maintain a display bundle transfer unit	4	3
Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings of life-related problems (ID9015)	4	5	Maintain a cigarette packer bundle transport unit	4	3	Maintain a display unit's exit heaters	4	3
Work with a wide range of patterns and inverses of functions and solve related problems	4	6						
Measure, estimate and calculate physical quantities and explore, critique and prove geometrical relations in two and three-dimensional space in the life and workplace of the audit with increasing responsibilities (ID9016)	4	4	Maintain a cigarette packer metallised paper feed and cutting unit	4	4	Maintain a cigarette packer compression turret	4	3
Engage in sustained oral communication and evaluate spoken texts (ID8974)	4	5	Maintain a cigarette packer hopper	4	3	Maintain a cigarette packer arbor drum	4	5
Read, analyse and respond to variety of texts (ID8975)	4	5	Perform a scheduled production machine service	4	6	Maintain a cigarette packer stamp unit	4	2
Write for a wide range of contexts (ID8976)	4	5	Maintain a display cartoning unit	4	3	Maintain a cigarette packer blank folding wheel	4	5
Use language and communication in occupational learning programmes (ID8979)	4	5	Maintain a cigarette packer packet reservoir	4	3	Maintain a cigarette packer inner frame unit	4	4

Accommodate audience and context needs in oral communication (ID8968)	3	5	Maintain a cigarette packer label and blank feed unit	4	8	Maintain a cigarette packer inner liner folding wheel	4	2
Interpret and use information from texts (ID8969)	3	5	Maintain an over-wrapping unit	4	2	Maintain a metallised paper embossing unit	4	5
Write texts from a range of communicative contexts (ID8970)	3	5	Maintain a cigarette packer drying drums	4	2			
Analyse and respond to a variety of literary texts (ID8971)	3	5	Maintain case packer and sealer unit	4	10			
			Maintain a cigarette packer exit conveyors	4	3			
			Maintain a film wrapper packet infeed unit	4	5			
			Maintain a film wrapper unwinding and cutting unit	4	4			
			Maintain a film wrapper folding station	4	5			
			Maintain first and second elevators	4	1			
		57			65			32

No. 1272

2 November 2004

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Visual Arts

Registered by NSB 02, Arts & Culture, publishes the following qualifications and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualifications and unit standards. The qualifications and unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum, 1067 Arcadia Street, Hatfield.

Comment on the qualifications and unit standards should reach SAQA at the address ***below and no later than 28 November 2004***. All correspondence should be marked **Standards Setting – SGB for Visual Arts** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431 5144

e-mail: dmphuthing@saga.co.za

JOE SAMUELS

DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

*Established in terms of Act 58 of 1995*

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

Qualification Title: National Certificate in Craft Operational Management (NQF Level 5)
NQF Level: 5
Total credits: 145 (minimum)
Fundamental Component: 42 credits
Core Component: 95 credits
Elective Component: 8 credits
Field: Culture and Arts
Sub-Field: Visual Art

Rationale

Legacies of the past resulted in many practitioners within the Craft sector in South Africa being denied advancement and possible recognition as qualified tradespersons. Both employers and employees in the craft sector have expressed the critical need for technical and business skills based qualifications for those practicing within the craft system. The introduction of a National Certificate in Craft Operational Management (NQF Level 5) based on unit standards will allow learners the opportunity to reach their full potential of advancement within formal education and will also allow for the recognition of prior learning. In small, medium, and micro craft enterprises (SMMEs) this person is responsible for all functions within the enterprise where in other organisations the focus is more on the operational actions only. Craft can include all fields that refer to craftsmanship, such as furniture making.

This qualification reflects the need of people within the craft sector both now and for the future. This qualification prepares learners for the National Certificates in Art, Craft and Design on the NQF level 6. This will enable learners to pursue different careers within the Arts and Culture sector and contribute towards the economical and ecological sustainability and improvement of the Craft environment.

Purpose of the qualification

This qualification is primarily intended for application in the craft enterprise environment. The qualification will give the learner the opportunity to obtain the competence in craft entrepreneurial, event, marketing management and product development, or have their competence recognised, as previously these competencies were not formally acknowledged. Learners can also obtain national recognition through a process of RPL. People credited with this qualification are able to operate in the craft sector. The qualification will thus enhance productivity within the Arts and Craft industry.

The qualification is designed to be flexible and accessible so that people are able to consistently

demonstrate the competencies required for working safely and effectively in craft enterprises in general.

The qualification is the foundation for development into other areas of craft such as design, production, event management, enterprise and marketing.

Learners credited with this qualification are capable of:

- Communicating in variety of ways to manage a craft enterprise
- Controlling and maintaining administrative and financial records
- Managing the implementation of design
- Supervising production processes of craft products
- Positioning a craft enterprise in an optimal location
- Managing human resources to promote an optimal level of productivity
- Strategising and planning for the sustainability and growth of a craft enterprise

Qualifying learners are also capable of:

- Supporting human resource management compassionately and/or in accordance with legislation OR
- Developing advanced business and marketing strategies OR
- Managing the exportation of Art and Culture products OR
- Facilitating learning in arts and culture modules and programmes.

Rules of combination

All the Fundamental Component Unit Standards are compulsory (42 credits).

All the Core Component Unit Standards are compulsory (95 credits).

For the Elective Component learners are required to attain 8 credits out of 30 credits

Access to the qualification

This qualification is open to anyone. It is advisable that learners should already have attained the competencies reflected under "Learning assumed to be in place" before embarking on learning towards this qualification. The exact starting point depends on the available resources for learning.

Learning assumed to be in place

It is assumed that learners embarking on learning towards this qualification are already competent in the areas of:

- Communication and language (NQF Level 4).
- Mathematic literacy (NQF Level 4).
- Craft enterprise (NQF Level 4).

Exit Level Outcomes and Associated Assessment Criteria

Exit Level Outcomes	Associated Assessment Criteria
Fundamental	
Communicate in variety of ways to manage a craft enterprise	<ul style="list-style-type: none"> • Resources are be procured through appropriate communication • Prices for materials and resources are negotiated • Tender documents are completed according to requirements • Networking is done by means of appropriate communication
Control and maintain administrative and financial records	<ul style="list-style-type: none"> • A suitable documentation and administrative system appropriate for craft enterprise is designed • Records are kept according to General Acceptable Accounting principles • Legal principles pertaining to the craft operation enterprise are adhered to • Craft products are cost and priced to be competitive and sustainable

Exit Level Outcomes	Associated Assessment Criteria
	<ul style="list-style-type: none"> Calculations are performed to maintain sustainability Financial controls including operational budgets, cash flow budget are designed for the craft enterprise
Core	
Manage the implementation of designs	<ul style="list-style-type: none"> Craft products are managed for a sustainable enterprise Product designs are related to production process Selected product design are implemented into a production line according to design specifications Designs are implemented in an efficient way
Supervise production processes of craft products	<ul style="list-style-type: none"> The layout of production line (equipment and floor) are researched and customised to the needs of the production process Manufacturing processes are optimally adapted for final assembly and outsourcing is matched to the production requirements Manufacturing and retail stock are managed and controlled in order to prevent delays and stock losses The operating cycle of the craft production process makes provision for seasonal variations
Position a craft enterprise in an optimal location	<ul style="list-style-type: none"> Location and facilities are researched to suit the needs of the specific craft business A Craft Exhibition / event is designed and executed to achieve the desired result Branding is included in the design of a marketing campaign to establish a sustainable enterprise
Manage human resources to promote an optimal level of productivity	<ul style="list-style-type: none"> An enterprise team is recruited, selected and placed to optimally match the Human Resource needs Training needs are identified for the entire enterprise team by means of a SWOT analysis Human Resource contracts are customised to suit needs of the craft enterprise
Strategise and plan for the sustainability and growth of a craft enterprise	<ul style="list-style-type: none"> Strategic plans are put in place to improve the craft enterprise Quality control and inspection systems are put in place, which allows for checks and balances Production and sales growth are in line with the strategic plan of the enterprise The procurement of export contracts is researched using reliable and valid methods The need of subcontractors is identified, accurately
Elective (achievement of one outcome is required)	
Support human resource management compassionately and /or in accordance with legislation	<ul style="list-style-type: none"> Employees are counselled as required and referrals made where appropriate Organisational rights are protected according to the Labour relations Act Employees rights are adhered to in accordance with the Labour relations Act Safe and environmentally friendly work practices are implemented
Develop advanced business and marketing strategies	<ul style="list-style-type: none"> The business objectives of an organisation are identified and an indication is given of how the achievement of business objectives is measured Business strategy is effectively communicate in a small business The target market is identified and accurately defined Products are optimally positioned in the market place
Facilitate learning in arts and culture modules and	<ul style="list-style-type: none"> Varied teaching strategies are used and adjusted to learners' needs and differences Effective communication to aid learning

Exit Level Outcomes	Associated Assessment Criteria
programmes	<ul style="list-style-type: none">• Learning and teaching in the classroom is managed, administered and coordinated• Learners are motivated, empowered and challenged to achieve their maximum potential
Manage the exportation of Art and Culture products	<ul style="list-style-type: none">• Exportation of products are comprehensively planned• Providers of international logistics services and modes of transport are selected which are the most appropriate• Payment terms are negotiated with foreign buyers and trade finance arranged, effectively• Statutory requirements (customs, port, health, import control) are complied with

International comparability

The Australian National Training Authority (ANTA) recognises craft production competence within the vocational education and training sector, for Certificates I through IV. Within the ANTA system, Certificate IV is described as follows: the breadth, depth and complexity of knowledge and competencies would cover a broad range of varied activities or applications in a wider variety of contexts most of which are complex and non-routine. Leadership and guidance are involved when organising activities of self and others as well as contributing to technical solutions of a non-routine or contingency nature.

Craft practitioner learning falls under the field of Art, and include competence to design, make and repair objects which have both functional and artistic qualities, working in wood, metal, glass, leather, ceramics, textiles and other materials. This includes designing the style and shape of objects, using and manipulating materials to make objects according to designs, finishing objects to enhance their artistic and/or practical qualities, and repairing damaged or defective craft objects.

Certificate I in Small Business Enterprise - Aboriginal Arts and Crafts (100 hours of learning) focuses on basic education and employment competence, and covers basic measurement, using basic power tools, occupational health and safety, writing skills, and a minimum of 20 hours of electives chosen from basic drawing, leather craft, oxy acetylene welding, basket weaving, batik, egg artistry - floral art, woodwork, painting, sewing, and traditional aboriginal artefact making.

Certificate II in Art and Craft is a 720-hour qualification, including 400 hours core and 120 hours elective learning, resulting in semi-skilled trade competence. It includes core competence regarding business practice; professional practice; marketing; occupational health and safety; field study; exhibition practice; painting; printmaking; screen printing; and sculpture. Certificate II is a South African NQF 3 equivalent.

Certificate IV in Aboriginal Arts and Cultural Practices includes 958 hours learning. Selection takes place from various arts areas such as painting, drawing, sculpture, printmaking, photography, ceramics, creative technology (digital arts), Aboriginal contextual studies (project based work), and core learning areas include contemporary Aboriginal arts, drawing, global art history/ theory, exhibition/presentation skills. Core subjects include: Cultural Productions; Exhibitions; Drawing the Human Figure; Drawing/Painting From the Visible World; Contemporary Aboriginal Art; Drawing; Portfolio Documentation & Presentation; Presenting Information. Electives could include: Computers; Document Production; Internet; World Wide Web; Screen Design for Interactivity; Art Photography; Painting; (Relief) Printmaking; Intaglio Printmaking; Art Screen printing; occupational health and safety in Visual Arts & Artists; Colour Theory; Sculpture; Handforming with Multi-Media/Modular Components; Ceramic Materials; Glazes for Visual Arts; Kilns & Firing for Visual Arts; Creative Technology; Arts Industries Studies; Aboriginal Contextual Studies & Art Practical; 2D Imaging for Artists; 2D Animation; Authoring - Multimedia; Design Principles; etc.

Comparable competence is attained in the United Kingdom in the general stream (rather than vocational or occupational learning) on their Level 2, comparable with the South African NQF Level 3. Competence in art, design, business, and engineering are included:

2D and 3D Visual language competence

Planning and working to project briefs to ensure clients' needs are met, including planning, creating and developing ideas and prototypes, and using sources, developed through exploring others' work

Producing work to a good standard, including producing completed art, craft or design work using materials, techniques and technology

Presenting solutions effectively to clients

Evaluating work in relation to briefs

The Scottish framework currently does not have any craft standards. Design, and graphic design in marketing is pegged at Level 4 (comparable to the South African NQF Level 5).

The New Zealand framework includes 10 levels: levels 1 to 3 are of approximately the same standard as senior secondary education and basic trades training, comparable to the South African NQF Level 4. Levels 4 to 6 approximate to advanced trades, technical and business qualifications, comparable to the South African NQF Level 5. Levels 7 and above equate with advanced qualifications of graduate and postgraduate standard, comparable to the South African NQF Levels 6 and higher.

On the New Zealand framework, craft is situated with arts, and specifically, included as a component of visual arts under the following domains:

- Contextual craft, art, and design practices
- Craft, art, and design management practices
- Craft, art, and design practices
- Craft, art, and design studio practices
- Professional practice - arts and crafts

No qualifications exist, and each area includes a number of unit standards that cover what is in this qualification:

Title	Credits	Level
Research the changing use of craft, art, and design images and objects	2	2
Explore processes to generate and develop ideas and solve problems in craft, art and design practice	8	3
Make a presentation about own art work using audio visual equipment	3	3
Research the relationships between culture and craft and art making	5	3
Explore and identify design process within craft and art design practice	4	4
Explore communication and presentation methods for craft, art, and design work	7	4
Explore procedures to produce craft, art, and design work	25	4
Explore qualities of materials within craft and art design process	4	4
Research and explore design fundamentals within craft and art design practice	4	4
Research origins and use craft, art, and design media to communicate self identity	7	4
Research the environmental impact of craft, art, and design production	7	4
Research the relationships between people, the world, and craft and art making	7	4
Explain current tax laws as they apply to a practising artist	3	5
Explore and apply design fundamentals within craft and art design practice	8	5
Identify and apply design process within craft and art practice	8	5
Maintain a healthy and safe working environment for craft, art, and design group practices	20	5
Practise communication and presentation techniques for craft, art, and design work	4	5
Prepare and maintain materials to produce craft, art, and design work	20	5
Prepare funding applications to fund art projects	3	5
Produce artist statements	3	5
Research and communicate influences on craft, art, and design practices	12	5
Research resource issues relating to the use of materials for producing craft, art, and design work	4	5
Research the relationship between craft, artist and society	12	5
Use craft, art, design media, techniques, and equipment	20	5
Analyse, implement, and evaluate design process and principles within craft and art practice	16	6
Communicate intentions through presentation of craft, art, and design work	4	6
Examine exhibition and commission contracts in terms of art practice	4	6
Examine marketing strategies for craft, art, and design work	4	6
Identify legal practices relating to craft, art, and design practices	4	6
Install site specific display of own art work	4	6

Manage financial practices for craft, art, and design projects	4	6
Participate in a craft, art, and design project team	9	6
Produce an analysis of copyright law in terms of visual arts practice	3	6
Produce craft, art, and design work to communicate influences on personal identity	9	6
Research resource issues that impact on craft, art, and design practice in Aotearoa-New Zealand	4	6
Research the relationship between craft, art, and design, society and personal practice	9	6
Analyse the context of personal craft, art, and design work and practice	9	7
Develop marketing strategies and prepare and evaluate a craft, art, and design marketing plan	5	7
Initiate craft, art, and design management goals and objectives	5	7
Manage a craft, art, and design project team	9	7
Produce a body of craft, art, and design work which communicates personal kaupapa	30	7
Research and utilise community and administration structures for craft, art, and design funding	5	7
Research power structures and produce work on global issues that impact on personal ideology	5	7
Use presentation to promote and communicate as part of craft, art, and design practice	5	7

Integrated assessment

The assessment criteria in the unit standards are performance-based, assessing applied competence rather than only knowledge, or skills. In addition, learners must demonstrate that they can achieve the outcomes in an integrated manner, dealing effectively with different and random demands related to the environmental conditions in occupational contexts, to qualify. Evidence is required that the learner is able to achieve the exit level outcomes of the qualification as a whole and thus its purpose, at the time of the award of the qualification. Workplace experience can be recognised when assessing towards this qualification.

Recognition of prior learning (RPL)

This qualification can be achieved wholly, or in part, through recognition of prior learning. Evidence can be presented in a variety of forms, including previous international or local qualifications, reports, testimonials, mentoring, functions performed, portfolios, work records and performance records. As such, evidence should be judged according to the general principles of assessment described in the notes to assessors below. Learners who have met the requirements of any Unit Standard that forms part of this qualification may apply for recognition of prior learning to the relevant Education and Training Quality Assurance body (ETQA). The applicant must be assessed against the specific outcomes and with the assessment criteria for the relevant Unit Standards. A qualification will be awarded should a learner demonstrate that the exit level outcomes of the qualification have been attained.

Articulation possibilities

This qualification provides articulation opportunities (vertical upward, vertical downward and horizontal) with a range of qualifications in the art, craft and design areas; and especially through fundamentals of other NQF qualifications.

Moderation options

Moderation of assessment and accreditation of providers shall be at the discretion of a relevant ETQA as long as it complies with the SAQA requirements. The ETQA is responsible for moderation of learner achievements of learners who meet the requirements of this qualification.

Particular moderation and accreditation requirements are:

- Any institution offering learning that will enable the achievement of this qualification must be accredited as a provider with the relevant ETQA. Providers offering learning towards achievement of any of the unit standards that make up this qualification must also be accredited through the relevant ETQA accredited by SAQA.
- The ETQA will oversee assessment and moderation of assessment according to their policies and guidelines for assessment and moderation, or in terms of agreements reached around assessment and moderation between the relevant ETQA and other ETQAs and in terms of the moderation guideline detailed here.
- Moderation must include both internal and external moderation of assessments for the qualification, unless the relevant ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described in Unit Standards as well as the integrated competence described in the qualification.
- Internal moderation of assessment must take place at the point of assessment with external moderation provided by a relevant ETQA according to the moderation guidelines and the agreed ETQA procedures.
- Anyone wishing to be assessed against this qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for assessors

Assessment of learner achievements takes place at providers accredited by the relevant ETQA (RSA, 1998b) for the provision of programs that result in the outcomes specified for this qualification. Anyone assessing a learner or moderating the assessment of a learner against this qualification must be registered as an assessor with the ETQA. Assessors registered with the relevant ETQA must carry out the assessment of learners for the qualification and any of the Unit Standards that make up this qualification.

To register as an assessor, the following are required:

- Detailed documentary proof of relevant qualification/s, practical training completed, and experience gained
- NQF recognised assessor credit

Assessors should keep the following general principles in mind when designing and conducting assessments:

- Focus the initial assessment activities on gathering evidence in terms of the main outcomes expressed in the titles of the Unit Standards to ensure assessment is integrated rather than fragmented. Remember that the learner needs to be declared competent in terms of the qualification purpose and exit level outcomes.
- Where assessment across Unit Standard titles or at Unit Standard title level is unmanageable, then focus assessment around each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.
- Make sure evidence is gathered across the entire range, wherever it applies.

In particular, assessors should assess that the learner demonstrates an ability to consider a range of options by:

- Measuring the quality of the observed practical performance as well as the theory and underpinning knowledge.
- Using methods that are varied to allow the learner to display thinking and decision making in the demonstration of practical performance.
- Maintaining a balance between practical performance and theoretical assessment methods to ensure each is measured in accordance with the level of the qualification.
- Taking into account that the relationship between practical and theoretical components is not fixed, but varies according to the type and level of qualification.

All assessments should be conducted in line with the following well-documented principles:

- **Appropriate:** The method of assessment is suited to the performance being assessed.
- **Fair:** The method of assessment does not present any barriers to achievements, which are not related to the evidence.
- **Manage:** The methods used make for easily arranged cost-effective assessments that do not unduly interfere with learning.
- **Integrate into work or learning:** Evidence collection is integrated into the work or learning process where this is appropriate and feasible.
- **Valid:** The assessment focuses on the requirements laid down in the standards; i.e. the assessment is fit for purpose.
- **Direct:** The activities in the assessment mirror the conditions of actual performance as close as possible.
- **Authentic:** The assessor is satisfied that the work being assessed is attributable to the learner being assessed.
- **Sufficient:** The evidence collected establishes that all criteria have been met and that performance to the required Standard can be repeated consistently.
- **Systematic:** Planning and recording is sufficiently rigorous to ensure that assessment is fair.
- **Open:** Learners can contribute to the planning and accumulation of evidence. Learners for assessment understand the assessment process and the criteria that apply.
- **Consistent:** The same assessor would make the same judgement again in similar circumstances. The judgement made is similar than the judgement that would be made by other assessors

Learning components

Component	Level 4			Level 5		
	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits
Fundamental	Cost and price a product (114737)	4	6	Tender for Art and Culture projects (New)	5	7
	Record Business Financial Transactions (114736)	4	5	Generate resources for projects (New)	5	6
	Perform Financial Planning and Control Functions for a Small Business (114738)	4	6	Procure and buy stock in a craft enterprise (New)	5	4
				Comply with legal requirements and understand implications in a craft enterprise (New)	5	8
Total		4	17		5	25
Core	Develop, implement and monitor a quality policy for a new venture (114588)	4	4	Research and generate ideas for craft exhibitions (New)	5	6
	Plan strategically to improve business performance. (114585)	4	4	Research and apply techniques for application to spatial design (New)	5	6
	Manage individual and team performance (11473)	4	8	Conceive, develop and realise exhibition designs (New)	5	8
				Install and dismantle exhibition elements (New)	5	6
				Organise and monitor exhibition installation / dismantling (New)	5	6
				Research and identify appropriate craft products that are current in market trends (New)	5	6
				Select and implement craft product designs into production line (New)	5	8
				Set up production lines in craft operations (New)	5	6
				Network in order to source information, advice or support in order to conclude contracts for a craft enterprise (New)	5	4
				Manage Individual Careers in a Craft Enterprise (New)	5	5
				Outsource contracts to match the craft production process (New)	5	3

				Research the viability of new craft enterprise and a new venture within a craft enterprise (New)	5	7
				Develop a Marketing Plan for a Craft Enterprise (New)	5	8
Total:		4	16		5	79
Elective	Demonstrate basic understanding of the Primary labour legislation that impacts on a business unit (13952)	4	8	Counsel workgroup members in respect of HIV/AIDS (13203)	5	3
	Demonstrate a basic understanding of the role of a business strategy in managing a small business or a business unit (13942)	4	5	Facilitate learning in arts and culture modules and programmes (115487)	5	10
	Demonstrate an understanding of product positioning (10061)	4	4			
	Monitor the application of safety, health and environmental protection procedures (13224)	4	4			
	Perform the Processes and Procedures Required for the Administration of Export Transactions (11416)	4	6			
Total		4	27		5	13

New Unit Standards with Specific Outcomes: National Certificate in Craft Operational Management (NQF Level 5)

Unit Standard Title: Tender for Art and Culture projects. NQF Level 5, 7 credits

Specific Outcome 1: Obtain and interpret documentation for a tender

Specific Outcome 2: Perform estimations for a tender

Specific Outcome 3: Compile a tender document for a craft enterprise

Specific Outcome 4: Submit tender and review tender process

Unit Standard Title: Generate resources for projects. NQF Level 5, 6 credits

Specific Outcome 1: Develop resourcing strategies and plans for project implementation

Specific Outcome 2: Motivate for resources to implement projects

Specific Outcome 3: Record the results of resource generation for future reference

Specific Outcome 4: Reflect on the success of the resourcing strategy

Unit Standard Title: Procure and buy stock in a craft enterprise. NQF Level 5, 4 credits

Specific Outcome 1: Establish source of supply of craft stock

Specific Outcome 2: Issue order for craft stock and prepare and/or verify relevant documentation

Specific Outcome 3: Negotiate profitable and acceptable conditions and develop relationships that will ensure effective supply of craft stock to the business

Specific Outcome 4: Evaluate current suppliers against the supplier specification and performance

Unit Standard Title: Comply with legal requirements and understand implications in a craft enterprise. NQF Level 5, 8 credits

Specific Outcome 1: Understand and apply legal implications of different forms of ownership

Specific Outcome 2: Implement required procedures and essential documentation in starting a craft enterprise.

Specific Outcome 3: Use, interpret and comply with legislation, rules and legal documentation to ensure compliance with legal & organisational requirements

Specific Outcome 4: Apply the financial elements and implications of an employment contract.

Specific Outcome 5: Explain and implement the role of the manager in ensuring that employees honour their responsibilities to the employer.

Unit Standard Title: Research and generate ideas for craft exhibitions. NQF Level 5, 6 credits

Specific Outcome 1: Identify and evaluate audience needs and opportunities

Specific Outcome 2: Conduct research for exhibition content and context

Specific Outcome 3: Generate ideas for exhibitions concept

Unit Standard Title: Research and apply techniques for application to spatial design. NQF Level 5, 6 credits

Specific Outcome 1: Interpret the brief for spatial design

Specific Outcome 2: Organize resources for spatial design

Specific Outcome 3: Test design approaches for spatial design

Specific Outcome 4: Make a model or aspect of the design

Unit Standard Title: Conceive, develop and realise exhibition designs. NQF Level 5, 8 credits

Specific Outcome 1: Interpret the brief or client specification

Specific Outcome 2: Conduct and evaluate research for the design process

Specific Outcome 3: Generate and assess the ideas

Specific Outcome 4: Develop and document the design

Specific Outcome 5: Communicate design ideas and make amendments

Specific Outcome 6: Liaise with others to implement exhibition

Unit Standard Title: Install and dismantle exhibition elements. NQF Level 5, 6 credits

Specific Outcome 1: Establish and confirm exhibition specifications

Specific Outcome 2: Prepare exhibition site

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



Established in terms of Act 58 of 1995

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

Qualification Title: Further Education and Training Certificate in Design Foundation (NQF Level 4)
NQF Level: 4
Credits: 141 (minimum)
Fundamental Component: 56 credits
Core Component: 75 credits
Elective Component: 10 credits
Field: NSB 02: Culture and Arts
Sub-field: Visual Arts

Rationale

The Further Education and Training Certificate in Design Foundation (NQF Level 4) is aimed at providing a foundation of generic competencies in design, allowing learners to explore different design fields in the creative industries. Such a foundation will improve the results of education and training yielded by of the previous system in South Africa.

The qualification provides a foundation that will give greater access to academically unprepared entrants into an extremely wide range of design career choices. The qualification will thus benefit the learner by empowering him/her to function in a variety of design and media technology disciplines in South Africa.

The introduction of a Further Education and Training Certificate in Design Foundation (NQF Level 4) based on unit standards will allow learners the opportunity to reach their full potential of advancement within formal education and will also allow for the recognition of prior learning. This qualification provides learners with access to qualifications in Design at NQF levels 5 and 6. This will enable learners to pursue different career paths within the culture and arts sector and contribute towards the economic sustainability and improvement of the design environment.

Purpose of the qualification

The purpose of this qualification is to provide a foundation for a variety of design-orientated fields, in that the learner gains competencies in the generic processes of various design specialisations.

The qualification formalises sets of competence and combinations of systems to help to accumulate expertise in this area of learning. Experiential knowledge is an important aspect of this qualification, as its application reaches across different fields, assisting in accelerating the learning of people who may have previously been denied opportunities in formal training or employment. An important part of achieving this qualification is for the learner to explore and experiment.

If lessons can be learned, documented and applied, a contribution will be made to building the discipline of design, as well as an integrated national framework for learning achievements, which is one of the primary objectives of the NQF. Learners credited with this qualification are capable of:

- Reflecting on own and others work in context
- Using mathematics in practical application
- Reading and interpreting visual images
- Developing yourself in a design career
- Producing a range of design works
- Exploring and communicating with a variety of mediums, media, processes and techniques

Qualifying learners are also capable of:

- Using new media technology OR
- Developing designs for marketable craft product ranges OR
- Designing aspects for performance OR
- Working in a business environment

Access to the qualification

Access to this qualification is open.

Learning assumed to be in place

Learning assumed to be in place for this qualification is the fundamental competencies in the areas of communication, mathematic literacy and life skills at NQF Level 3 of the Further Education and Training Band.

Learners are also assumed to have attained competence in the area of Culture and Arts at NQF Level 1 of the General Education and Training Band.

Learners are also assumed to have attained competence in the area of computer literacy in the areas of developing word processing documents, spreadsheets, using a personal computer operating system and ability to use the World Wide Web with electronic mailing.

Rules of combination

All the Fundamental Component Unit Standards are compulsory (56 credits).

All the Core Component Unit Standards are compulsory (75 credits).

For the Elective Component learners are required to attain 10 credits out of 46 credits

Exit level outcomes and associated assessment criteria

Exit Level Outcomes	Associated Assessment Criteria
Fundamental and Core	
Reflect on own and others' work in context	Work has been contextualised appropriately Work has been interpreted appropriately Reflections are valid and substantive Verbal descriptions and explanations are valid and successful Written descriptions and explanations are valid and appropriate Written descriptions and explanations are clear and logical
Reading and interpreting visual images	Interpretation and reading of a variety images is valid and substantive Interpretation and reading is contextualised appropriately Explanations and descriptions are appropriate and valid Interpretation and reading of visual language is appropriate to the level of study Use of visual and verbal vocabulary is appropriate to the context Interpretations and readings are original and appropriate

Exit Level Outcomes	Associated Assessment Criteria
Develop yourself for a design career	<p>Identification and selection of career opportunities are relevant and appropriate</p> <p>Descriptions of self and own strengths and weaknesses is relevant and appropriate</p> <p>Appropriate information gathering techniques have been utilised successfully</p> <p>Time was effectively utilised</p>
Produce a range of design works	<p>Wide range of demonstrated conceptual skills are of appropriate depth to the level of study</p> <p>Level of finish is appropriate to the level of study</p> <p>A range of problem solving techniques have been used successfully to create valid solutions to the brief</p> <p>Explanations and descriptions of the various visual and conceptual components are accurate and appropriate</p> <p>Range of work demonstrates the successful use of a variety of techniques and processes exploring a number of design disciplines and contexts</p> <p>Range of works is appropriate to the level of study</p>
Explore and communicate with a variety of mediums, media, processes and techniques	<p>Exploration of a wide variety of media and mediums has led to clear and appropriate communication</p> <p>Processes of exploration demonstrate appropriate development as well as appropriate problem solving skills</p> <p>Demonstration of relevant skills pertinent to the media and mediums (including computer) is appropriate and contextualise</p> <p>Descriptions and explanations of elements and processes are accurate, appropriate and substantive</p> <p>Descriptions and interpretations of target markets and accurate and valid</p>
Using mathematics in practical application	<p>Use knowledge of numbers and their relationships affecting the visual communication sector to investigate a range of different contexts which include financial aspects of personal, business and national issues</p> <p>Recognise, interpret, describe and represent various functional relationships to solve problems in the visual communication context</p> <p>Measure using appropriate instruments, to estimate and calculate physical quantities, and to interpret, describe and represent properties of and relationships between 2-dimensional and 3-dimensional objects in a variety of orientations and positions within the visual communication context</p> <p>Collect, summarise, display and analyse data and to apply knowledge of statistics of probability to communicate, justify, predict and critically interrogate findings and draw conclusions on information in the visual communication context</p>
Elective (one exit outcome)	Associated Assessment Criteria
Use new media technology	<p>Computer-generated images were produced and printed</p> <p>Word processing documents were produced using basic functions.</p> <p>Computer-aided presentations were produced through using basic functions.</p>
Develop marketable craft product ranges	<p>Design components of prototypes were interpreted, identified and applied.</p> <p>Marketable ranges of craft products were developed</p> <p>Craft product ranges were assessed.</p>
Design aspect for performances	<p>The design needs and resources for a performance, as provided by the text, director, context of performance, performance space were assessed</p> <p>The contribution made by different aspects of performance technology</p>

Exit Level Outcomes	Associated Assessment Criteria
	to effective performance was analysed Design elements for use in a performance were conceptualised Apply skills, techniques and technologies of the design elements in performance effectively.
Work in a business environment	A business plan is presented in a form that would be generally acceptable for a business. Actual performances of an organisation against budget were performed. Personal effectiveness in a business environment is achieved.

International comparability

A comprehensive search for similar qualifications in other countries in Africa yielded no results.

Australia has two qualifications that compares closely to this qualification:

- Certificate III in Design Fundamentals, and
- Certificate IV in Design

Certificate III in Design Fundamentals:

This qualification contains the following units that correlate closely with the South African Further Education and Training Certificate in Design Foundation (NQF Level 4)

- Develop, refine and communicate concept for own work
- Follow health safety and security procedures
- Produce drawings to represent and communicate the concept
- Source and apply design industry knowledge
- Apply the design process to 2-dimensional work in response to a brief
- Apply the design process to 3-dimensional work in response to a brief

Certificate IV in Design

The following units that correlates closely with this qualification:

- Originate concept for own work and conduct critical discourse
- Follow health safety and security procedures
- Select and apply drawing techniques and media to represent and communicate the concept
- Source and apply design industry knowledge
- Apply the design process to 2-dimensional work in response to a brief
- Apply the design process to 3-dimensional work in response to a brief
- Interpret and respond to a brief

New Zealand also has two qualifications that closely resemble the current one. Each of these qualifications has very few (one and two respectively) units, which are listed below, under the qualifications titles

- The National Certificate in Visual Arts (Level 4)

Title	Level	Credits
Develop visual arts works from given briefs	4	60

- National Diploma in Visual Arts (Advanced)

Title	Level	Credits
Develop a body of visual arts work from selected ideas	5	60
Develop a body of visual arts work from independent investigation	6	80

Scotland has an Intermediate, Level qualification in Art and Design that contain a large unit that closely resembles those of this qualification:

Demonstrate knowledge and understanding of a selected area of design
--

This qualification contains Unit Standards that is comparable to those in used in other areas of the world, for a similar qualification. Furthermore, this qualification is at NQF Level 4 (below degree level), which further aligns it with international standards.

Integrated assessment

The assessment criteria in the unit standards are performance-based, assessing applied competence rather than only knowledge, or skills. In addition, learners must demonstrate that they can achieve the outcomes in an integrated manner, dealing effectively with different and random

demands related to the environmental conditions in occupational contexts, to qualify. Evidence is required that the learner is able to achieve the exit level outcomes of the qualification as a whole and thus its purpose, at the time of the award of the qualification. Workplace experience can be recognised when assessing towards this qualification.

Integrated assessment at the level of qualification provides an opportunity for learners to show that they are able to integrate concepts, ideas and actions across unit standards to achieve competence that is grounded and coherent in relation to the purpose and exit level outcomes of the qualification. Integrated assessment should show how already demonstrated competence in individual areas can be linked and applied for the achievement of a holistic outcome.

Integrated assessment must judge the quality of the observable performance, and also the quality of thinking that lies behind it. Assessment tools must encourage learners to explain the thinking and decision-making that underpin their demonstrated performance. Allowance must be made for creative freedom, exploration and experimentation, which are not easily measurable.

A broad range of task-orientated and theoretical assessment tools may be used, with the distinction between practical knowledge and disciplinary knowledge maintained so that each takes its rightful place. Unit standards in the qualification must be used to assess specific and critical cross-field outcomes. During integrated assessments the assessor should make use of formative and summative assessment methods and should assess combinations of practical, applied, foundational and reflexive competencies.

While the foundational component (literacy, communication and numeracy skills) of this qualification on NQF level 4 can be assessed through occupational contexts and activities relating to design, care must be taken in both the learning programme and the assessment to ensure that these foundational skills are truly portable. The primary aim of this qualification is to ensure that learners have a sound base of general education to prepare them for further learning, whatever career path they may choose.

Recognition of prior learning (RPL)

This qualification can be achieved wholly, or in part, through recognition of prior learning. Evidence can be presented in a variety of forms, including previous international or local qualifications, reports, testimonials, mentoring, functions performed, portfolios, work records and performance records. As such, evidence should be judged according to the general principles of assessment described in the notes to assessors below. Learners who have met the requirements of any Unit Standard that forms part of this qualification may apply for recognition of prior learning to the relevant Education and Training Quality Assurance body (ETQA). The applicant must be assessed against the specific outcomes and with the assessment criteria for the relevant Unit Standards. A qualification will be awarded should a learner demonstrate that the exit level outcomes of the qualification have been attained.

Articulation possibilities

Vertical articulation upwards is possible with, for example, National Certificate in Design (NQF 5)
Vertical articulation downwards is possible with various National Certificates at NQF level 3
Horizontal articulation on the NQF is possible with various National Certificates at NQF level 4, for example the Further Education and Training Certificate in Craft Enterprise (NQF Level 4).

Moderation options

Moderation of assessment and accreditation of providers shall be at the discretion of a relevant ETQA as long as it complies with the SAQA requirements. The ETQA is responsible for moderation of learner achievements of learners who meet the requirements of this qualification. Particular moderation and accreditation requirements are:

- Any institution offering learning that will enable the achievement of this qualification must be

accredited as a provider with the relevant ETQA. Providers offering learning towards achievement of any of the unit standards that make up this qualification must also be accredited through the relevant ETQA accredited by SAQA.

- The ETQA will oversee assessment and moderation of assessment according to their policies and guidelines for assessment and moderation, or in terms of agreements reached around assessment and moderation between the relevant ETQA and other ETQAs and in terms of the moderation guideline detailed here.
- Moderation must include both internal and external moderation of assessments for the qualification, unless the relevant ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described in Unit Standards as well as the integrated competence described in the qualification.
- Internal moderation of assessment must take place at the point of assessment with external moderation provided by a relevant ETQA according to the moderation guidelines and the agreed ETQA procedures.
- Anyone wishing to be assessed against this qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for assessors

Assessment of learner achievements takes place at providers accredited by the relevant ETQA (RSA, 1998b) for the provision of programs that result in the outcomes specified for this qualification. Anyone assessing a learner or moderating the assessment of a learner against this qualification must be registered as an assessor with the ETQA. Assessors registered with the relevant ETQA must carry out the assessment of learners for the qualification and any of the Unit Standards that make up this qualification.

To register as an assessor, the following are required:

- Detailed documentary proof of relevant qualification/s, practical training completed, and experience gained
- NQF recognised assessor credit

Assessors should keep the following general principles in mind when designing and conducting assessments:

- Focus the initial assessment activities on gathering evidence in terms of the main outcomes expressed in the titles of the Unit Standards to ensure assessment is integrated rather than fragmented. Remember that the learner is competent in terms of the qualification purpose and exit level outcomes.
- Where assessment across Unit Standard titles or at Unit Standard title level is unmanageable, focus assessment around each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.
- Make sure evidence is gathered across the entire range, wherever it applies.

In particular, assessors should assess that the learner demonstrates an ability to consider a range of options by:

- Measuring the quality of the observed practical performance as well as the theory and underpinning knowledge.
- Using methods that are varied to allow the learner to display thinking and decision making in the demonstration of practical performance.
- Maintaining a balance between practical performance and theoretical assessment methods to ensure each is measured in accordance with the level of the qualification.
- Taking into account that the relationship between practical and theoretical components is not fixed, but varies according to the type and level of qualification.

All assessments should be conducted in line with the following well-documented principles:

- Appropriate: The method of assessment is suited to the performance being assessed.
- Fair: The method of assessment does not present any barriers to achievements, which are not

related to the evidence.

- **Manage:** The methods used make for easily arranged cost-effective assessments that do not unduly interfere with learning.
- **Integrate into work or learning:** Evidence collection is integrated into the work or learning process where this is appropriate and feasible.
- **Valid:** The assessment focuses on the requirements laid down in the standards; i.e. the assessment is fit for purpose.
- **Direct:** The activities in the assessment mirror the conditions of actual performance as close as possible.
- **Authentic:** The assessor is satisfied that the work being assessed is attributable to the learner being assessed.
- **Sufficient:** The evidence collected establishes that all criteria have been met and that performance to the required Standard can be repeated consistently.
- **Systematic:** Planning and recording is sufficiently rigorous to ensure that assessment is fair.
- **Open:** Learners can contribute to the planning and accumulation of evidence. Learners for assessment understand the assessment process and the criteria that apply.
- **Consistent:** The same assessor would make the same judgement again in similar circumstances. The judgement made is similar than the judgement that would be made by other assessors

Learning Components

Component	Level 3		Credits	Level 4		Credits
	Unit Standard Title	Level		Unit Standard Title	Level	
Fundamental	Accommodate audience and context needs in oral communication (8968)	3	5	Engage in sustained oral communication and evaluate spoken texts (8974)	4	5
	Interpret and use information from texts (8969)	3	5	Read, analyse and respond to a variety of texts (8975)	4	5
	Write texts for a range of communicative contexts (8970)	3	5	Write for a wide range of contexts (8976)	4	5
	Use language and communication in occupational learning programmes (8973)	3	5	Use language and communication in occupational learning programmes (8979)	4	5
				Use mathematics to investigate and monitor the financial aspects of personal, business, and national issues () Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues (7468)	4	2
				Measure, estimate & calculate physical quantities & explore, critique & prove geometrical relationships in 2 and 3 dimensional space in the life and workplace of adult with increasing responsibilities (12417)	4	4
				Solve problems involving sequences and series in real and simulated situations (7483)	4	2
				Represent and operate on complex numbers in non-trivial situations (7466)	4	2
				Work with a wide range of patterns and inverses of functions and solve related problems (7470)	4	6
Total		3	20		4	36
Core	Manage work time effectively (9530)	3	3	Use visual communication techniques to represent a concept	4	10

Component	Level 3			Level 4		
	Unit Standard Title	Level	Credits	Unit Standard Title	Level	Credits
	Apply problem-solving techniques to make a decision or solve a problem in a real life context. (114952)	3	2	Conceptualise and plan design	4	15
				Interpret and respond to Design brief	4	5
				Use elements and principles of 2D & 3D design	4	10
				Realise and review a design	4	15
				Use knowledge of self to make a life decision in the creative world	4	5
				Access different approaches to drawing (115115)	4	10
Total		3	5		4	70
Elective	Produce and use spreadsheets for business (7567)	3	5	Develop and produce computer-generated images (14473)	4	4
	Produce presentation documents for business (7575)	3	5	Perform Financial Planning and Control Function for a Small Business (114738)	4	6
				Develop designs for marketable craft product ranges (115123)	4	10
				Design aspects for performances (114552)	4	10
				Achieve personal effectiveness in business environment (110021)	4	6
Total		3	10		4	36

New Unit Standards: Further Education and Training Certificate in Design Foundation (NQF level 4)

Unit Standard Title: Use visual communication techniques to represent a concept, NQF Level 4, 10 credits

- Specific Outcome 1: Explore visual communication techniques and produce presentations
- Specific Outcome 2: Research visual communication techniques for representing concepts
- Specific Outcome 3: Determine purpose for presentation
- Specific Outcome 4: Present a concept

Unit Standard Title: Conceptualise and plan design, NQF Level 4, 15 credits

- Specific Outcome 1: Research concept ideas
- Specific Outcome 2: Generate concept
- Specific Outcome 3: Conduct critical discussion
- Specific Outcome 4: Plan the production of the work
- Specific Outcome 5: Refine the concept

Unit Standard Title: Interpret and respond to design brief, NQF Level 4, 5 credits

- Specific Outcome 1: Interpret the brief
- Specific Outcome 2: Liaise with client
- Specific Outcome 3: Source and review information for application in concept
- Specific Outcome 4: Apply information on ethical and legal work practices

Unit Standard Title: Use elements and principles of 2D & 3D design, NQF Level 4, credits 10

- Specific Outcome 1: Examine information on two-dimensional design
- Specific Outcome 2: Apply design processes to produce samples of two dimensional design work
- Specific Outcome 3: Examine information on three-dimensional design
- Specific Outcome 4: Apply design processes to produce samples of three dimensional design work

Unit Standard Title: Realise and review a design, NQF Level 4, 15 credits

- Specific Outcome 1: Assess design concepts
- Specific Outcome 2: Realise the design concept
- Specific Outcome 3: Communicate the design concept
- Specific Outcome 4: Review and refine the design concept

Unit Standard Title: Use knowledge of self to make a life decision in the creative world, NQF Level 4, 5 credits

- Specific Outcome 1: Demonstrate knowledge and understanding of self as a unique creative individual.
- Specific Outcome 2: Identify own role and contribution in the creative world.
- Specific Outcome 3: Use a variety of strategies to deal with life situations.
- Specific Outcome 4: Make an informed life decision based on self-knowledge to enter the creative world.

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