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GOVERNMENT NOTICES

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

No. 159

25 February 2005



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

Generic Management

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 qualification and unit standards should reach SAQA at the address ***below and no later than 24 March 2005***. All correspondence should be marked **Standards Setting – SGB for Generic Management** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. E. Brown

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431-5144

e-mail: EddieBrown@saga.co.za



DUGMORE MPHUTHING

ACTING DIRECTOR: STANDARDS SETTING AND DEVELOPMENT



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:

National Diploma: Business Consulting Practice

SAQA QUAL ID	QUALIFICATION TITLE		
49419	National Diploma: Business Consulting Practice		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
QUAL TYPE	FIELD	SUBFIELD	
National Certificate	Business, Commerce and Management Studies	Generic Management	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUALIFICATION CLASS
Undefined	257	Level 5	Regular-Unit Stds Based

PURPOSE AND RATIONALE OF THE QUALIFICATION

The purpose of this Qualification is to provide learners with the knowledge to enter the field of Business Consulting (ERP).

Specifically the purpose of this Diploma Qualification is to:

- > Equip learners to understand and apply the underlying principles of the Enterprise Resource Planning (ERP) sector using BCP (Business Consulting Practice) skills
- > Provide career paths through associated learnerships at various levels and areas of the Business Consulting Practice (ERP) environment
- > Provide for mobility of learning into associated areas
- > Equip learners to become effective employees, employers and/or self-employed members of society
- > Develop a richer learning environment in the field of BCP (ERP) through high quality life-long learning
- > Improve the ERP skills of employees in the sector
- > Enable the learner to assist within his/her community and thereby ensure social and economic transformation.
- > Ensure the development of competence in the BCP and ERP fields

The Qualification provides the learner with a solid understanding of the business and technical knowledge and skills required to be able to assist in providing BCP (ERP) services at an Assistant Consultant level, to be able to communicate effectively with clients, and support clients/users at their own level.

It provides an entry point into the BCP (ERP) career path, which was not available before, and for which there is a growing demand, especially in the SMME environment.

This Diploma may be acquired in the traditional way by formal study at an accredited ERP institution, as well as in the work place through a Learnership. Acquiring the Qualification through a Learnership has the potential of addressing the problem of newly qualified persons finding it difficult to get employment, due to their not having any prior practical experience. It will allow the learner to gain ERP project exposure by actively being able to participate in implementation, and to gain adequate module/sub-module navigation skills.

This learning supports the objectives of the NQF through increased portability and articulation of learning and career path progression. By concentrating on the link between theory and practice, the quality of education and training, as well as the personal development of the learner, will be elevated.

Rationale for the qualification:

Traditional Enterprise Resource Planning (ERP) consultants are trained within particular ERP modules (e.g. Materials Management, Finance, Controlling, and Supply Chain Management), which correspond to particular functions within a business. Such expertise can be limiting in developing enterprise solutions for clients. With experience most consultants find it necessary to broaden their scope of understanding to meet the demands of clients seeking efficient holistic business solutions.

This Qualification is aimed at meeting the changing needs of the marketplace by developing consultants with a solid understanding of the entire enterprise model. Such consultants can operate beyond their specific discipline because they understand the underlying business enterprise model. This allows the consultant to bridge the gap between the client's business strategy and the underlying technology that can best be customised to provide the client's strategic advantage.

Beyond the specific technical or functional discipline of an ERP consultant, the Qualification extends to the broad range of skills necessary for the development of successful consultants including:

- > Solution Development: Systematic overview of ERP concepts and process design; functional modules that need to be included in an ERP System; understanding of system security methods; testing and acceptance procedures
- > Consulting: The role of the consultant and managing a client relationship; provision of post contract services and client follow-up
- > Business Conduct: Ethics, etiquette in a business environment
- > Sales Management: Awareness of the sales cycle and the marketing of consulting as a service-based product; bid management and understanding of governance issues within a client organisation
- > Market place: Knowledge of the ERP market; Partners and competitors
- > Project Management: Understanding the project lifecycle; project roles; project documentation and key project concepts e.g. scope, risk management, stakeholders, ERP related documentation templates and tools
- > Change Management: Understanding the definition, principles, scope and methodologies
- > Implementation: Life cycle and sequences; Project teams and transition strategies; system configuration; considerations of data conversion; prototyping and testing
- > Communication skills: Usage of and exposure to business communication methods; writing and presenting proposals
- > Knowledge Management: Knowledge sharing and intellectual capital
- > Personal Development: Life skills; self-driven development & growth concepts and application of life long learning

The wide range of skills gives the learner a holistic understanding of the business environment in which consultants operate, and provides the industry and clients with fundamentally competent professionals.

The Qualification is aimed at recent graduates with first degrees or persons with 5 years of relevant business experience. The Qualification provides the opportunity for such individuals to pursue a career in ERP consulting, developing through NQF Qualifications and following a career path in business consulting.

Such a career path allows individuals to work in the business area and industries of their choosing. Business consulting skills developed in this learning path would have a bias towards ERP enterprise solutions. However, the training is such that individuals can apply the learning to consulting in businesses where the solutions are based on a variety of other technologies. Consultants that are developed through this Qualification also develop entrepreneurial and marketing skills. They are trained to understand the value of intellectual capital and the various methods of harnessing their skills and knowledge in this regard. Such expertise is necessary in the South African economy to develop the people who are able to create business opportunities and unlock potential value.

The Diploma is designed to meet the needs of the learners who are already employed and involved in the fields of Business Consulting Practice (BCP) and/or ERP. Additionally, however, it will also meet the needs and aspirations of the youth and unemployed who wish to pursue a career in BCP, ERP and associated fields, or in other fields where this learning may be useful. This includes adult learners who want to enter the sector or develop their careers in one or more of the related learning areas. Since the Diploma is part of a learning pathway, it will allow mobility to persons operating at any level in the field.

The Qualification provides learners with a solid grounding in the field. This will enable them to understand the South African and global ERP arena and will underpin their ability to use this learning in various business environments. The development of competence in this field will lead to better service delivery, company longevity, the promotion of wealth and job creation.

This Qualification recognises the fact that knowledge and the application of Enterprise Resource Planning is a business imperative, necessary for the success of any organisation, both strategically and operationally. This Diploma in BCP (ERP) is thus designed to enable individuals to develop the theoretical competencies and the practical skills to operate effectively in the field.

This Qualification also reflects some of the needs of the BCP (ERP) sector both now and in the future.

The impact of the Qualification on society and the economy is reflected in the multiple job roles and careers that can stem from the Qualification, including self-employment opportunities, job creation opportunities and the development of, or entry to, learners who are employed within the private or public sector. It can further stimulate and support skills development in the SMME sector.

This Qualification is also ideal for the development of a number of learnerships leading to the attainment of the Qualification and so to improved career opportunities for employed and unemployed learners.

RECOGNIZE PREVIOUS LEARNING?

N

LEARNING ASSUMED TO BE IN PLACE

Learners accessing this Qualification should therefore also be competent in:

- > Communication at NQF Level 4
- > Mathematical Literacy at NQF Level 4
- > End User Computing (EUC) Level 4

Computer literacy at NQF Level 4 (EUC) or equivalent practical experience demonstrated via RPL, including the use of an operating system and standard applications, is assumed of learners undertaking this Qualification.

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.

The approach taken to RPL in this Qualification most certainly reflects the objectives of the NQF in that it will allow access to Qualifications for a large section of previously disadvantaged persons who were marginalised from mainstream education and training. RPL will also provide access for the youth and unemployed to embark on learning and career path progression. However RPL is perhaps more relevant to provide recognition of experience acquired over many years in the workplace for those already employed. RPL will allow these persons to accumulate credits for experiential learning gained. In this way, as a result of RPL, each of these groups of individuals will be able to receive portable, nationally recognised formal Qualifications.

QUALIFICATION RULES

Level, credits and learning components assigned to the Qualification:

This Diploma in BCP: (ERP) is at NQF Level 5 as the complexity of learning, as embodied by the specific outcomes of the related unit standards, conforms to the level of difficulty of learning at Level 5. The learning in turn is determined by the skills, knowledge, attitudes and values and is matched to the responsibility level

of practitioners at whom it is aimed. The number of credits available for this Qualification is divided as follows:

FUNDAMENTAL
26 credits at Level 5

CORE
14 credits at Level 4
185 credits at Level 5

ELECTIVE
4 credits at Level 4
67 credits at Level 5

TOTAL CREDITS
18 credits at Level 4
278 credits at Level 5

Total credits for Qualification 257 credits.

Learners must select a Minimum of 32 credits from the 71 credits available in the Elective Unit Standards to make up the 257 credits required for the Qualification-257 credits Total

The Diploma is clearly linked to a smooth progression on a learning pathway.

Fundamental Component

While there is no SAQA requirement relating to the specific number of credits in the Fundamental component of a Level 5 Qualification, the scoping exercise carried out clearly indicates that the learning included in this component of the Qualification is essential for all learners to function effectively in their designated workplaces and to ensure success with the Core and Elective learning that has to take place. All of these unit standards are compulsory. Total 26 credits.

Core Component

The Core component of the Qualification consists of unit standards designed to equip the learner with the necessary functional skills and knowledge base required to operate competently within the BCP (ERP) environment. These competencies relate directly to the actual work performed by employees in the sector. All of these unit standards are compulsory. Total 199 credits.

Elective Component

A wide range of Elective unit standards has been identified for inclusion in the Elective component of the Qualification. They relate to the range of areas in which the consultant can work. The range of possibilities embodied in the list means that both individual and company choice are readily possible. This also enhances the possibility of any learnership that is registered based on this Qualification being demand-led rather than supply-driven. It is anticipated that over time more unit standards will be added to expand the scope of the Diploma. The learner is required to select unit standards to a value of at least 32 credits for this component.

EXIT LEVEL OUTCOMES

1. Use effective communication in a business consulting environment
2. Explain and apply the basics of a consulting environment
3. Implement and follow business consulting practices and procedures
4. Explain and assist the sales process in an ERP consulting organization
5. Assist with solution development tasks within an ERP deployment and implementation project
6. Develop specific documentation and training materials
7. Provide management support to clients

Critical cross-field outcomes:

The various constituent parts of the Qualification, namely Consulting, Sales, Solution Development and Management as well as the Fundamental and Elective Components, present numerous opportunities to develop each of the Critical Cross-Field Outcomes. It is anticipated that accredited service providers will readily be able to do so.

It is apparent that the following Critical Outcomes will easily be developed as an intrinsic part of any learning programme:

1. The nature of the Exit Level Outcomes and Associated Assessment Criteria is such that creative problem solving is explicitly required.
2. Team and group work is a functional necessity and the Associated Assessment Criteria specify this.
3. The same considerations as in (2) apply to the capacity of the individual learner in "managing and organising him/herself and his/her activities responsibly and effectively."
4. In participating in defining a solution to the Solution Development problem at hand, each learner is required to "collect, analyse, organise and critically evaluate information."
5. Communicating effectively is explicitly part of the requirements built into the Fundamental Component of the Qualification.
6. Projecting a positive image of the company and the product
7. In ERP development within an organisational setting, a systemic approach is encouraged throughout.

More detail will be provided within each Unit Standard of how the Critical Outcomes need to be emphasised.

ASSOCIATED ASSESSMENT CRITERIA

1.
 - > The writing process is used to compose texts required in the business environment
 - > Workplace data is analysed and communicated using clearly understandable language and different data display tools (e.g. diagrams and charts)
 - > Communication skills are applied in the workplace
2.
 - > An understanding of the business of consulting is demonstrated and contextualized within the organization
 - > A consulting service ethic is developed and applied to a consulting interaction and when dealing with fellow workers
 - > A knowledge of the client is achieved within a consulting contract, demonstrating an understanding of the client organization, business context and relevant issues
3.
 - > Assistance in researching the problem and the solution within a consulting context is given
 - > Administrative support is provided to a team within a consulting context
 - > Post-contract support, service and client follow-up is performed in a well-planned, meticulous manner
 - > Specific consulting model is developed through participation in the consulting process
 - > Effective working relationship is maintained with client within a consulting contract
 - > Issues are clarified through participation in a specific consulting contract
 - > Post-contract services and client follow-up are provided to a consulting contract
4.
 - > The concept of the consulting service as a product is understood and can be clearly communicated, either verbally, or in writing
 - > The process of lead generation is understood in terms of identifying, discussing and feeding back potential sales leads
 - > Assistance in writing and presenting proposals within a consulting context is given
 - > Understanding is demonstrated of Governance issues within a client organisation.
 - > The ERP market, partners and competitors are explained according to industry practices
5.
 - > The generic business process and value chain model of an organisation is understood and related to the best-practice business processes
 - > A basic knowledge of ERP solutions and modules can be demonstrated against a specific ERP solution
 - > The ERP process design is prepared and contributed to (i.e. business process, industry understanding, value chain model)
 - > Systems security methods are developed in an ERP system
 - > Testing and acceptance procedures are set up and performed within an ERP system

6.

- > Types of documents are identified in line with requirements
- > Training materials are explained and researched in accordance with industry standards
- > Training materials are developed and implemented to meet client requirements

7.

- > Support in the way of administration and problem solving are implemented in accordance with organisational requirements
- > Assistance is provided in the way of change management and organisational transformation
- > After sales service is provided to the client according to requirements

Integrated assessment:

The Qualification and its associated assessment criteria have been designed so that assessment is fully integrated with the learning. The learner must, in an authentic setting:

- > 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 emphasis throughout the Qualification should be on continuous, formative assessment. Much of this is achieved in "sites of application" and involves a range of assessment tools, which will include a degree of self and peer assessment. A number of appropriate summative assessments should be planned at specific times, by assessor and learner jointly, throughout the learning process.

As a result of a range of ongoing assessment approaches in terms of testing and evaluating the fundamental, practical and reflexive competence of the learner, a skills matrix should be produced. This will clearly indicate not only the knowledge gaps and skills deficits of the individual, but also highlight the learner's strengths and weaknesses related to the other elements of applied competence, namely:

- > information processing and the power of analysis
- > problem solving and a decision making capacity
- > communication skills.

The assessment process should be capable of being applied to RPL, subject to the rules and criteria of the relevant ETQA.

INTERNATIONAL COMPARABILITY

Enterprise Resource Planning (ERP) is a combination of business management best practice and technology, where Information Technology integrates with a company's core business processes to enable the achievement of specific business objectives.

One of the first developers of an ERP software application was by a German company in 1972. This company is Systems, Applications Products in Data Processing (SAP AG). Their product has been so well accepted in the market place, that they now have subsidiaries in more than 50 countries around the world. It is now the 3rd largest software developer in the world with over 17,500 customers worldwide. There are now 44,500 installations in 120 countries, with more than 10 million users.

The company has also accredited more than 17 Logo Consulting Partners (typically large firms with worldwide service capabilities that can provide support in all phases of an implementation project). They include international firms such as Anderson Consulting, CAP GEMINI, CSC, Deloitte Consulting Group, Ernst & Young, Hewlett Packard Professional Services, IBM Global Services, KPMG, Price Waterhouse Coopers, etc. They also have more than 100 Consulting Firms (National Implementation Partners) that focus on the mid-market.

Other international implementers of ERP solutions are companies (amongst others) such as PeopleSoft, BAAN, JD Edwards, Oracle, SAS, Sun Systems, IBM etc.

From the above it can be clearly seen that SAP, as the largest international implementer of ERP Systems, plays a major role in guiding the content and standards for ERP training and consulting services. To this end they have issued the Process Aligned Consulting Excellence (PACE) Handbook.

The content of the Qualification conforms to the requirements of the SAP Consulting Skills and

Competencies Framework, as outlined in the Process Aligned Consulting Excellence (PACE) Handbook as issued by SAP Germany, and which is used internationally to guide training.

The level 5 Certificate (Associate) and level 5 Diploma (Trainee) meet the entry-level requirements for Qualification as an ERP (SAP) Business Consultant at level 6. This is the normal entry to Business Consulting ERP (SAP) and the first level at which a comparison can be made. Reference can be made to the National Skills Standards Board Website: www.nssb.org - SAP Application Consultant Certification, as well as IBM, Oracle etc.

ARTICULATION OPTIONS

This Qualification lends itself to both vertical and horizontal articulation possibilities. These possibilities ensure both mobility and progression for the learner. The learning areas outlined in the Rationale for the Qualification indicates the articulation possibilities.

Horizontal articulation is possible with:

- > National Diploma: Advanced Business Management - NQF Level 5 - NLRD 18940
- > National Certificate: Business Advising - NQF Level 5 - NLRD 48886
- > National Certificate: Business consulting Practice (Enterprise Resource Planning) - NQF Level 5 - NLRD 48874
- > National Higher Certificate: Small business Management - NQF Level 5 - NLRD 1045

Vertical progression is possible with:

- > Bachelor of Commerce: Business Management - NQF Level 6 - NLRD 7043
- > Bachelor of Commerce: Business Management - NQF Level 6 - NLRD 17506
- > Certificate: Business Management - NQF Level 6 - NLRD 36045
- > National Diploma: Small Business Management - NQF Level 6 - NLRD 20009

Note: Vertical progression is subject to the admission requirements of Higher Education institutions.

MODERATION OPTIONS

- > Anyone assessing a learner, or moderating the assessment of a learner, against this Qualification must be registered as an assessor 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. Iteration of the process, and continued review and maintenance of this Qualification will ensure development of the NQF and this framework in particular.

In terms of quality assurance, the following criteria for the registration of assessors and moderators apply:

- > A minimum of two years of practical, relevant occupational experience,
- > Proven competency in all the outcomes of the appropriate unit standards as stipulated by SAQA,
- > Documentary proof of educational Qualification, practical training undergone, and experience gained in the form of a Portfolio of Evidence.

CRITERIA FOR THE REGISTRATION OF ASSESSORS

N/A

NOTES

N/A

UNIT STANDARDS*(Note: A blank space after this line means that the qualification is not based on Unit Standards.)*

UNIT STANDARD ID AND TITLE		LEVEL	CREDITS	STATUS
Core	10131 Identify, organise and co-ordinate project life cycle phases for control purposes	Level 4	5	Reregistered
Core	13835 Contribute to project initiation, scope definition and scope change control	Level 4	9	Reregistered
Core	115394 Develop a consulting service ethic	Level 5	5	Registered
Core	115395 Apply and explain the generic business process and value chain model	Level 5	12	Registered
Core	115397 Understand and apply the concept of the consulting service as a product	Level 5	5	Registered
Core	115398 Observe and record the findings of a business requirements gathering session	Level 5	8	Registered
Core	115399 Apply the process of lead generation	Level 5	5	Registered
Core	115400 Demonstrate and apply a basic knowledge of ERP solutions and modules	Level 5	10	Registered
Core	115402 Assist in researching the problem and the solution within a consulting context	Level 5	6	Registered
Core	115403 Know the client within a consulting contract	Level 5	6	Registered
Core	115404 Understand the business of consulting	Level 5	8	Registered
Core	115408 Apply and explain knowledge of the transactions within an ERP module	Level 5	8	Registered
Core	115411 Assist in the configuration of an ERP module	Level 5	12	Registered
Core	115412 Populate documentation templates	Level 5	8	Registered
Core	119085 Develop a working knowledge of a module within an Enterprise Resource Planning system	Level 5	10	Draft - Prep for P Comment
Core	119086 Develop an understanding of systems security methods (authorisations) in an Enterprise Resource Planning system	Level 5	8	Draft - Prep for P Comment
Core	119087 Configure and customise the transactions to the business requirements within an Enterprise Resource Planning system	Level 5	15	Draft - Prep for P Comment
Core	119088 Set up and perform testing and acceptance procedures	Level 5	10	Draft - Prep for P Comment
Core	119090 Use the Project Management methodology, related tools and document templates of an Enterprise Resource Planning product	Level 5	10	Draft - Prep for P Comment
Core	119171 Analyse and make decisions for the development and selection of a specific consulting model	Level 5	8	Draft - Prep for P Comment
Core	119173 Develop and maintain effective working relationship with clients	Level 5	8	Draft - Prep for P Comment
Core	119175 Participate in the clarification of issues regarding a consulting engagement	Level 5	5	Draft - Prep for P Comment
Core	119176 Respond to a request for proposal	Level 5	5	Draft - Prep for P Comment
Core	119177 Identify and explain governance issues within a client organisation	Level 5	4	Draft - Prep for P Comment
Core	119178 Identify and explain the Enterprise Resource Planning market, partners and competitors	Level 5	4	Draft - Prep for P Comment
Core	119181 Prepare for and contribute to Enterprise Resource Planning process design	Level 5	5	Draft - Prep for P Comment
Elective	14927 Apply problem solving strategies	Level 4	4	Registered
Elective	15235 Prepare and conduct staff selection interviews	Level 5	3	Registered
Elective	115396 Support post-contract service and client follow-up	Level 5	8	Registered
Elective	115401 Apply the basic principles of issue management	Level 5	8	Registered
Elective	115405 Apply Principles of Knowledge Management to Organisational Transformation	Level 5	10	Registered
Elective	115406 Provide administrative support within a consulting context	Level 5	5	Registered
Elective	115407 Apply the principles of change management in the workplace	Level 5	10	Registered
Elective	119084 Research and provide after sales service of the consulting engagement	Level 5	8	Draft - Prep for P Comment
Elective	119089 Develop end-user documentation and manuals	Level 5	10	Draft - Prep for P Comment
Elective	119091 Prepare for and provide end-user training	Level 5	5	Draft - Prep for P Comment
Fundamental	10622 Conduct communication within a business environment	Level 5	8	Reregistered

Fundamental	15234 Apply efficient time management to the work of a department/division/section	Level 5	4	Registered
Fundamental	115789 Sustain oral interaction across a wide range of contexts and critically evaluate spoken texts	Level 5	5	Registered
Fundamental	115790 Write and present for a wide range of purposes, audiences and contexts	Level 5	5	Registered
Fundamental	115817 Provide and respond to feedback	Level 5	4	Registered



Established in terms of Act 58 of 1995

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Analyse and make decisions for the development and selection of a specific consulting model

SAQA US ID	UNIT STANDARD TITLE		
119171	Analyse and make decisions for the development and selection of a specific consulting model		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 5	Regular

SPECIFIC OUTCOME 1

Explain the principles and theory that underpin the development and selection of a consulting model.

SPECIFIC OUTCOME 2

Apply consulting interventions given the discipline-specific nature of a client's problem.

SPECIFIC OUTCOME 3

Analyse the appropriateness of consulting interventions given the client's organisational culture and business environment.

SPECIFIC OUTCOME 4

Decide on the appropriateness of consulting interventions given the consulting firm's expertise, ethos, policies, procedures and service ethic.

SPECIFIC OUTCOME 5

Decide on the appropriateness of consulting interventions in the light of the needs and interests of all stakeholders.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Configure and customise the transactions to the business requirements within an Enterprise Resource Planning system

SAQA US ID		UNIT STANDARD TITLE	
119087		Configure and customise the transactions to the business requirements within an Enterprise Resource Planning system	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	15	Level 5	Regular

SPECIFIC OUTCOME 1

Explain the detailed design requirements within a business process according to clients' needs.

SPECIFIC OUTCOME 2

Configure/Develop the enterprise resource planning system according to detailed design requirements.

SPECIFIC OUTCOME 3

Carry out procedures to test and verify the accuracy of the configuration.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Develop a working knowledge of a module within an Enterprise Resource Planning system

SAQA US ID		UNIT STANDARD TITLE	
119085		Develop a working knowledge of a module within an Enterprise Resource Planning system	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Explain the various modules in an Enterprise Resource Planning solution.

SPECIFIC OUTCOME 2

Explain the underlying Enterprise Resource Planning system architecture.

SPECIFIC OUTCOME 3

Identify the various business processes that apply to a particular Enterprise Resource Planning module and related transactions.

SPECIFIC OUTCOME 4

Contribute to the customisation of an Enterprise Resource Planning module to meet the requirements of a related business process.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Develop an understanding of systems security methods (authorisations) in an Enterprise Resource Planning system

SAQA US ID		UNIT STANDARD TITLE	
119086		Develop an understanding of systems security methods (authorisations) in an Enterprise Resource Planning system	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 5	Regular

SPECIFIC OUTCOME 1

Explain and define systems security requirements.

SPECIFIC OUTCOME 2

Develop systems security requirements within an Enterprise Resource Planning system.

SPECIFIC OUTCOME 3

Test and correct developed systems security requirements.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Develop and maintain effective working relationship with clients

SAQA US ID	UNIT STANDARD TITLE		
119173	Develop and maintain effective working relationship with clients		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 5	Regular

SPECIFIC OUTCOME 1

Obtain information about the client's position, role and influence within the organisation to establish long-term working relationships.

SPECIFIC OUTCOME 2

Match the client's needs and expectations for a consulting project with the consultant's attributes, skills and expertise.

SPECIFIC OUTCOME 3

Relate the long-term ramifications of an implemented solution to the client's long-term objectives.

SPECIFIC OUTCOME 4

Apply the knowledge (concepts and principles) of consulting in maintaining an effective working relationship with the client.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Develop end-user documentation and manuals

SAQA US ID		UNIT STANDARD TITLE	
119089		Develop end-user documentation and manuals	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Plan and design documentation for an end-user agreed standards.

SPECIFIC OUTCOME 2

Create documentation for an end-user to agreed standards.

SPECIFIC OUTCOME 3

Identify the need and requirements of the training materials.

SPECIFIC OUTCOME 4

Develop outcomes to be achieved through the training materials.

SPECIFIC OUTCOME 5

Design the framework for the training materials and draft materials.

SPECIFIC OUTCOME 6

Pilot and verify end-user training material.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Identify and explain governance issues within a client organisation

SAQA US ID	UNIT STANDARD TITLE		
119177	Identify and explain governance issues within a client organisation		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	4	Level 5	Regular

SPECIFIC OUTCOME 1

Identify and explain legislation applicable to Governance in the Business environment, both Public and Private sectors.

SPECIFIC OUTCOME 2

Identify and explain the governance structure applicable within a specific organisation.

SPECIFIC OUTCOME 3

Relate the role played by the governance structures within an organisation.

SPECIFIC OUTCOME 4

Compare and explain governance structures between Public and Private Sector organisations.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Identify and explain the Enterprise Resource Planning market, partners and competitors

SAQA US ID	UNIT STANDARD TITLE		
119178	Identify and explain the Enterprise Resource Planning market, partners and competitors		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	4	Level 5	Regular

SPECIFIC OUTCOME 1

Identify the Enterprise Resource Planning market.

SPECIFIC OUTCOME 2

Identify the key players within a specific Enterprise Resource Planning market.

SPECIFIC OUTCOME 3

Describe the role of the key players within a specific Enterprise Resource Planning market.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Participate in the clarification of issues regarding a consulting engagement

SAQA US ID	UNIT STANDARD TITLE		
119175	Participate in the clarification of issues regarding a consulting engagement		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	5	Level 5	Regular

SPECIFIC OUTCOME 1

Assist in assessing the need a client has for the intervention of a consultant.

SPECIFIC OUTCOME 2

Record the criteria that will determine the success of any proposed consulting engagement.

SPECIFIC OUTCOME 3

Assist in developing a measuring instrument with which to assess the output or end result of the proposed consulting engagement.

SPECIFIC OUTCOME 4

Ascertain and document clearly the roles of client, consultant and consumers (the end users of the changes introduced during the consulting engagement).



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Prepare for and contribute to Enterprise Resource Planning process design

SAQA US ID		UNIT STANDARD TITLE	
119181		Prepare for and contribute to Enterprise Resource Planning process design	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	5	Level 5	Regular

SPECIFIC OUTCOME 1

Prepare for a business process definition workshop.

SPECIFIC OUTCOME 2

Facilitate a process definition workshop.

SPECIFIC OUTCOME 3

Advise on business process fundamentals.

SPECIFIC OUTCOME 4

Document the client's business process.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Prepare for and provide end-user training

SAQA US ID	UNIT STANDARD TITLE		
119091	Prepare for and provide end-user training		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	5	Level 5	Regular

SPECIFIC OUTCOME 1

Explain training concepts.

SPECIFIC OUTCOME 2

Prepare the training intervention.

SPECIFIC OUTCOME 3

Provide training to the end-user.

SPECIFIC OUTCOME 4

Implement learning activities.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Research and provide after sales service of the consulting engagement

SAQA US ID	UNIT STANDARD TITLE		
119084	Research and provide after sales service of the consulting engagement		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	8	Level 5	Regular

SPECIFIC OUTCOME 1

Assess the effectiveness of the solution implemented during the consulting engagement.

SPECIFIC OUTCOME 2

Research the client's requirements following the closeout of a consulting engagement.

SPECIFIC OUTCOME 3

Develop an "optimising model" for the change project.

SPECIFIC OUTCOME 4

Assist the client in sustaining the implemented change.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Respond to a request for proposal

SAQA US ID	UNIT STANDARD TITLE		
119176	Respond to a request for proposal		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	5	Level 5	Regular

SPECIFIC OUTCOME 1

Determine the capacity of the organisation to respond to the request for proposal.

SPECIFIC OUTCOME 2

Determine major competitive advantage in responding to the request for proposal.

SPECIFIC OUTCOME 3

Gather and collate data and information required to respond to the request for proposal.

SPECIFIC OUTCOME 4

Draft the response for a proposal.

SPECIFIC OUTCOME 5

Test the proposed response to an request for proposal among a peer group.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Set up and perform testing and acceptance procedures

SAQA US ID		UNIT STANDARD TITLE	
119088		Set up and perform testing and acceptance procedures	
SGB NAME		NSB 03	PROVIDER NAME
SGB Generic Management		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Generic Management
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Identify test scenarios according to Business Process and design requirements.

SPECIFIC OUTCOME 2

Design and document test scenarios.

SPECIFIC OUTCOME 3

Execute testing of scenarios in accordance with client/end-user.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Use the Project Management methodology, related tools and document templates of an Enterprise Resource Planning product

SAQA US ID	UNIT STANDARD TITLE		
119090	Use the Project Management methodology, related tools and document templates of an Enterprise Resource Planning product		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Generic Management	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Generic Management	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Identify and explain the methodology associated with a specific Enterprise Resource Planning product.

SPECIFIC OUTCOME 2

Identify and explain the tools and templates available in the methodology.

SPECIFIC OUTCOME 3

Outline the role of the specific tools and templates available.

SPECIFIC OUTCOME 4

Apply the tools and templates to the appropriate need.

No. 160

25 February 2005

Established in terms of Act 38 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

Banking and Micro Finance

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

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standards. The 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 qualification and unit standards should reach SAQA at the address ***below and no later than 24 March 2005***. All correspondence should be marked **Standards Setting – SGB for Banking and Micro Finance** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. E. Brown

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431-5144

e-mail: EddieBrown@saga.co.za


DUGMORE MPHUTHING

ACTING DIRECTOR: STANDARDS SETTING AND DEVELOPMENT



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Compute the estate duty liability in a deceased estate

SAQA US ID		UNIT STANDARD TITLE	
119148		Compute the estate duty liability in a deceased estate	
SGB NAME		NSB 03	PROVIDER NAME
SGB Banking and Micro Finance		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Finance, Economics and Accounting
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	15	Level 5	Regular

SPECIFIC OUTCOME 1

Determine the dutiable estate.

SPECIFIC OUTCOME 2

Determine the dutiable amount of the estate.

SPECIFIC OUTCOME 3

Calculate and apportion the estate duty payable.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Establish and manage a testamentary trust

SAQA US ID		UNIT STANDARD TITLE	
119135		Establish and manage a testamentary trust	
SGB NAME		NSB 03	PROVIDER NAME
SGB Banking and Micro Finance		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Finance, Economics and Accounting
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	5	Level 5	Regular

SPECIFIC OUTCOME 1

In the case of a Testamentary Trust, analyse and interpret the instructions and wishes contained in the deceased's will.

SPECIFIC OUTCOME 2

Attend to the registration of the Trust.

SPECIFIC OUTCOME 3

Set up and manage a Trust.

SPECIFIC OUTCOME 4

Manage the relationships with Trustees and Beneficiaries.

SPECIFIC OUTCOME 5

Terminate a Trust.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Establish and manage an inter vivos trust

SAQA US ID	UNIT STANDARD TITLE		
119141	Establish and manage an inter vivos trust		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Banking and Micro Finance	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Finance, Economics and Accounting	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Ascertain and analyse the client's requirements for the trust to be created, including questions assessing the need for a trust.

SPECIFIC OUTCOME 2

Ensure the client's understanding of the implications of establishing the trust.

SPECIFIC OUTCOME 3

Draft the trust deed.

SPECIFIC OUTCOME 4

Attend to the execution of the Deed of Trust and the registration of the trust.

SPECIFIC OUTCOME 5

Set up and manage a trust.

SPECIFIC OUTCOME 6

Manage the relationships with trustees and beneficiaries.

SPECIFIC OUTCOME 7

Terminate a trust.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Interpret the will in a deceased estate

SAQA US ID		UNIT STANDARD TITLE	
119133		Interpret the will in a deceased estate	
SGB NAME		NSB 03	PROVIDER NAME
SGB Banking and Micro Finance		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Finance, Economics and Accounting
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 5	Regular

SPECIFIC OUTCOME 1

Determine the validity of the Will.

SPECIFIC OUTCOME 2

Determine the Executor nominated in the Will to administer and distribute the estate.

SPECIFIC OUTCOME 3

Determine the devolution of the estate.

SPECIFIC OUTCOME 4

Determine the terms and conditions of any limited interests created in terms of the Will.

SPECIFIC OUTCOME 5

Determine any special directions and/or wishes expressed by the Testator.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Liquidate a deceased estate

SAQA US ID	UNIT STANDARD TITLE		
119137	Liquidate a deceased estate		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Banking and Micro Finance	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Finance, Economics and Accounting	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	15	Level 5	Regular

SPECIFIC OUTCOME 1

Manage the accounting aspects of a deceased estate.

SPECIFIC OUTCOME 2

Value the assets.

SPECIFIC OUTCOME 3

Establish and settle the income tax liability.

SPECIFIC OUTCOME 4

Realise such assets as are required to be sold or redeemed.

SPECIFIC OUTCOME 5

Establish, record and settle the other liabilities and administration expenses of the estate.

SPECIFIC OUTCOME 6

Deal with the post-death income and expenditure.

SPECIFIC OUTCOME 7

Maintain the relationship with the beneficiaries.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Prepare, lodge and advertise the liquidation and distribution account in a deceased estate

SAQA US ID	UNIT STANDARD TITLE		
119138	Prepare, lodge and advertise the liquidation and distribution account in a deceased estate		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Banking and Micro Finance	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Finance, Economics and Accounting	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	15	Level 5	Regular

SPECIFIC OUTCOME 1

Prepare the liquidation and distribution account.

SPECIFIC OUTCOME 2

Lodge the liquidation and distribution account.

SPECIFIC OUTCOME 3

Advertise the Liquidation and Distribution Account.

No. 161

25 February 2005

**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

Marketing

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 qualification and unit standards should reach SAQA at the address ***below and no later than 24 March 2005***. All correspondence should be marked **Standards Setting – SGB for Marketing** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. E. Brown

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431-5144

e-mail: EddieBrown@saga.co.za



DUGMORE MPHUTHING

ACTING DIRECTOR: STANDARDS SETTING AND DEVELOPMENT



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:

National Certificate: Trade Exhibition Support

SAQA QUAL ID	QUALIFICATION TITLE		
49447	National Certificate: Trade Exhibition Support		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Marketing	Business, Commerce and Management Studies		
QUAL TYPE	FIELD	SUBFIELD	
National Certificate	Business, Commerce and Management Studies	Marketing	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUALIFICATION CLASS
Undefined	132	Level 3	Regular-Unit Stds Based

PURPOSE AND RATIONALE OF THE QUALIFICATION

NC: Trade Exhibition Support provides a mixture of theory and practice. It requires learners to understand the elements required for effective Trade Exhibition support, while also giving them the opportunity to learn the practical application in an active and successful trade exhibition environment.

This Qualification is for any individual who is or wishes to be involved in Trade Exhibition Support. It is intended for those aspiring to careers within the various business areas or sectors in the Exhibitions Support Industry. It also serves as an entry-level qualification into Trade Exhibitions. This qualification will be registered at NQF Level 3.

The elective component of the Qualification allows the learner to select unit standards that will enhance their own particular chosen career in this industry. The core unit standards are relevant to all areas of Trade Exhibition Support and will build a solid foundation for the learner.

Learners working towards this Qualification will find that the acquisition of competence in the unit standards, which make up the Qualification, will add value to their jobs. This Qualification is intended to enhance the provision of entry-level service within the Exhibition Industry. It provides the broad knowledge, skills and values needed in the industry. It facilitates access to, while providing mobility and progression within, education and training. It allows for progression along a learning pathway for learners who

- > Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- > Have worked in the Exhibition Industry for many years, but have no formal qualification in this area
- > Wish to extend their range of skills and knowledge of the industry to become competent workers in the Exhibition Industry.

The Qualification has building blocks that can be developed further, leading to a defined Trade Exhibition career and provides a learning pathway to more complex NQF levels. It focuses on the skills, knowledge, values and attitudes required to progress further. The intention is to

- > Promote the development of knowledge, skills and values required in Trade Exhibitions.
- > Release the potential of people for growth and development.
- > Provide opportunities for people to move along career paths by being more valuable to their organisation, the economy and themselves.

Rationale of the qualification:

NC: Trade Exhibition Support: NQF Level 3 is designed to enable people to embark on a career within the Exhibition industry, leading to entrepreneurial opportunities for learners. It will also enhance the self-image of

individual learners as they become more self-sufficient. Improved self-image leads to a more positive outlook and performance within the Exhibition job market and society at large. Furthermore, the Qualification will provide a means to set standards in the Exhibition industry and provide a mechanism for regulating the services provided, from a quality and professional point of view.

There is a need to develop career paths in this industry, which is constantly in need of skilled people. The Exhibition industry is one of the fastest growing industries in South Africa, as it markets itself globally. It will therefore ensure that the quality of education and training is enhanced in South Africa and be of a world-class standard.

The qualification allows the learner to work towards a nationally recognised qualification. It will allow both those in formal education and those already employed in organisations in the Exhibition industry to benchmark their competence against local and international standards. Recognition of excellence is important in order to foster healthy competition and to ensure professional standards.

RECOGNIZE PREVIOUS LEARNING?

Y

LEARNING ASSUMED TO BE IN PLACE

The following is the learning assumed to be in place:

- > Computer Literacy.
- > Mathematical Literacy at NQF Level 2.
- > Communications at NQF Level 2.

Recognition of prior learning:

The structure of this Unit Standard based Qualification makes the Recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this qualification. Recognition of Prior Learning will be done by means of an Integrated Assessment as mentioned in the previous paragraph.

This Recognition of Prior Learning may allow:

- > For accelerated access to further learning.
- > Gaining of credits for a unit standard.
- > Obtaining this qualification in whole or in part.

All recognition of Prior Learning is subject to quality assurance by the relevant accredited Education Training Quality Assurance (ETQA) Body and is conducted by a registered workplace assessor.

QUALIFICATION RULES

Levels, credits and learning components assigned to the qualification

Rules to Combinations

The qualification is made up of a combination of learning outcomes from Fundamental, Core and Elective components, totalling 131 credits.

- > Fundamental 46 credits 35%
- > Core 66 credits 49%
- > Elective Minimum 20 credits 16%

Total 132 credits (minimum) 100%

Fundamental

- > 6 credits at Level 2.
- > 40 credits at Level 3.
- > 46 credits.

Core

- > 49 credits at Level 3.
- > 17 credits at Level 4.

> 66 credits.

Elective

- > Learners must select a Minimum of 20 credits from the Elective Unit Standards to make up the 132 credits required
- > 20 Minimum.

Total Credits

- > 132 credits Minimum.
- > 6 credits Fundamental at Level 2.
- > 40 credits Fundamental at Level 3.
- > 49 credits Core at Level 3.
- > 17 credits Core at Level 4.
- > 20 credits Minimum Electives.
- Total: 132 Minimum.

Motivation for number of credits assigned to fundamental, core and elective

Fundamental Credits

At level 3, SAQA stipulates the minimum number of credits allocated to Communication and Mathematical Literacy should total 36 credits, however the SGB felt that the additional fundamental unit standards chosen will add value to the qualification as a whole. All the unit standards are compulsory.

Core

66 credits have been allocated to the Core Unit Standards. This is to ensure that the qualification has a strong Trade Exhibition focus. The Core Unit Standards offer a broad contextual understanding and will enable the learners to gain an all round picture of the Trade Exhibition Industry. All the unit standards are compulsory.

Electives

A minimum of 20 credits must be selected by the learner from the Elective Unit Standards. There are a total of 60 credits for the Elective area. They also allow for progression to the next level of learning.

EXIT LEVEL OUTCOMES

1. Demonstrate an understanding of life skills and apply them in the working environment.
2. Manage information systems and process data flow in a business environment.
3. Describe the design process in the exhibition industry and produce floor plans for an exhibition.
4. Describe the features and services of the exhibition industry.
5. Describe the build-up and breakdown process of an exhibition, control venue equipment and assets, and provide support at an exhibition.
6. Apply basic business skills and techniques in daily functions within the exhibition industry.
7. Describe and apply management and other functions within a business.
8. Manage and work with others in a team to enhance performance.

ASSOCIATED ASSESSMENT CRITERIA

1.
 - > Effects of HIV/AIDS in the workplace and on a business as a whole are explained.
 - > A personal computer system is operated using appropriate hardware and software requirements.
2.
 - > Data on stakeholders and the exhibition industry is researched and processed using organizational requirements.
 - > An information system is planned, monitored and controlled in a business environment.
3.
 - > The role of design in the exhibition industry is explained with examples.
 - > Venue and exhibition floor plans are produced to client and exhibition requirements.
4.
 - > The features of the exhibition industry are described using industry norms.

- > Exhibition services are explained using a particular organization's exhibition services.
 - > A selected business environment is described using examples from that environment.
 - > Current affairs relating to the industry are monitored and updated on a regular basis.
- 5.
- > The sequence of exhibition build-up and break-down is explained with practical examples.
 - > Venue equipment and assets are controlled and maintained according to organisational requirements.
 - > On-site exhibition support is provided using organisational requirements and instruction.
- 6.
- > Corporate culture is applied and implemented using a specific organisation's culture.
 - > Basic business calculations are performed to meet organisational requirements.
 - > Clients are communicated with, using an organization's policies and procedures.
 - > A formal meeting is conducted following established procedures.
 - > Occupational health and safety is maintained in accordance with regulatory requirements.
 - > General housekeeping is maintained.
- 7.
- > Management functions in an organisation are described with examples.
 - > Ethical behaviour is maintained at all times.
 - > Professionalism in a business environment is demonstrated.
 - > The Basic Conditions of Employment are observed and applied.
 - > The roles of team leader and the team are highlighted to ensure that they meet an organisation's standards.
 - > A new member is inducted into a team.
 - > Time and the work process in a business environment are managed.
 - > Stock is controlled and located according to organizational requirements.
 - > First aid is provided using first aid principles and practices.
- 8.
- > Workplace relationships are described, with examples of how to manage them.
 - > Knowledge of self and team is applied in developing a plan to enhance team performance.

Integrated assessment:

An integrated assessment approach is incorporated into the qualification because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever.

Learning, teaching and assessment are inextricably linked. Whenever possible, the assessment of knowledge, skills, attitudes and values shown in the unit standards should be integrated.

Assessment of the communication, language, literacy and numeracy will be conducted in conjunction with other aspects and will use authentic Exhibition contexts wherever possible.

A variety of methods must be used in assessment. Tools and activities must be appropriate to the context in which the learner is working. Where it is not possible to assess the learner in the workplace or on the job, 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. During integrated assessments the assessor should make use of formative and summative assessment methods and assess combinations of practical, applied, foundational and reflexive competencies.

Assessors and moderators should make 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.

Assessment should ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated. The assessment of the critical cross-field outcomes should be integrated with the assessment of specific outcomes and embedded knowledge.

INTERNATIONAL COMPARABILITY

The Trade Exhibition Industry is a discipline with globally recognised best practices, standards and qualifications. This qualification and related unit standards utilises international and locally recognised best practice and standards.

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against:

Association of Exhibition Organisers - United Kingdom
 > Short course - Winning Exhibition Telesales.
 > Short course - Selling to the Exhibition Organiser.

New Zealand Qualifications Authority
 > National Certificate in Security (with strands in mobile patrol, personal protection retail security, secure transport, site security and venue security)- Level 3.
 > National Certificate in Sport (with strands in event management, sport administration and team management) - Level 3.
 > Unit Standard - Describe strategies for preventing injury on construction sites - 3 credits - Level 3.

Where possible, a direct comparison with each unit standard/course was undertaken and the relevant points were incorporated into each South African unit standard. However, the outcomes incorporated were written in a South African context.

ARTICULATION OPTIONS

Horizontal articulation is possible with the following qualifications:
 > National Certificate: General Security Practices - NQF Level 3 - NLRD 22490.
 > National Certificate: Auctioneering Support - NQF Level 3 - NLRD 48864.

Vertical articulation is possible with the following qualifications:
 > National Certificate: Tourism: Car Rental - NQF Level 4 -NLRD 17492.
 > Further Education and Training Certificate: Manufacturing and Assembly Logistics (M&AL) - NQF Level 4 - NLRD 48962.

MODERATION OPTIONS

> Anyone assessing a learner or moderating the assessment of a learner against this qualification must be registered as an assessor with the relevant Education and Training Quality Assurance (ETQA) Body, or with an ETQA that has a Memorandum of Understanding (MoU) 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 (MoU) with the relevant ETQA.

> Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQA's policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between 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 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 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.

CRITERIA FOR THE REGISTRATION OF ASSESSORS

For an applicant to register as an assessor, the applicant needs:
 > A minimum of 2 (two) years' practical, relevant occupational experience.

- > To be declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by South African Qualifications Authority (SAQA).
 > A qualification in marketing or sales at NQF level 4 or above.

NOTES**UNIT STANDARDS**

(Note: A blank space after this line means that the qualification is not based on Unit Standards.)

	UNIT STANDARD ID AND TITLE	LEVEL	CREDITS	STATUS
Core	8016 Maintaining occupational health, safety and general housekeeping	Level 3	8	Registered
Core	11241 Perform Basic Business Calculations	Level 3	6	Registered
Core	13914 Conduct a formal meeting	Level 3	3	Registered
Core	13933 Plan, monitor and control an information system in a business environment	Level 3	3	Registered
Core	119132 Research and process data on stakeholders in the exhibition industry	Level 3	3	Draft - Prep for P Comment
Core	119134 Explain the sequence of exhibition build-up and breakdown	Level 3	3	Draft - Prep for P Comment
Core	119152 Explain exhibition services	Level 3	4	Draft - Prep for P Comment
Core	119153 Apply and implement corporate culture	Level 3	2	Draft - Prep for P Comment
Core	119157 Produce venue and exhibition floor plans	Level 3	8	Draft - Prep for P Comment
Core	119158 Control and maintain venue equipment and assets	Level 3	3	Draft - Prep for P Comment
Core	119164 Explain the role of design in the exhibition industry and general design awareness	Level 3	4	Draft - Prep for P Comment
Core	119165 Describe the features of the exhibition industry	Level 3	2	Draft - Prep for P Comment
Core	10024 Liaise with a range of customers of a business	Level 4	4	Reregistered
Core	14357 Demonstrate an understanding of a selected business environment	Level 4	10	Registered
Core	119136 Provide on-site exhibition support	Level 4	3	Draft - Prep for P Comment
Elective	14341 Keep informed about current affairs related to one's own industry	Level 2	4	Registered
Elective	14359 Behave in a professional manner in a business environment	Level 2	5	Registered
Elective	8025 Controlling and locating stock	Level 3	8	Reregistered
Elective	10170 Demonstrate understanding of employment relations in an organisation	Level 3	3	Registered
Elective	13911 Induct a new member into a team	Level 3	3	Registered
Elective	13912 Apply knowledge of self and team in order to develop a plan to enhance team performance	Level 3	5	Registered
Elective	13917 Indicate the role of a team leader ensuring that a team meets an organisation's standards	Level 3	6	Registered
Elective	13918 Manage time and the work process in a business environment	Level 3	4	Registered
Elective	114943 Describe how to manage workplace relationships	Level 3	2	Registered
Elective	116492 Identify and explain appropriate ways of interacting ethically in multi-cultural contexts	Level 3	6	Registered
Elective	7854 Provide First Aid	Level 4	4	Reregistered
Elective	14667 Describe and apply the management functions of an organization	Level 4	10	Registered
Fundamental	7547 Operate a personal computer system	Level 2	6	Reregistered
Fundamental	7456 Use mathematics to investigate and monitor the financial aspects of personal, business and national issues	Level 3	5	Reregistered
Fundamental	8968 Accommodate audience and context needs in oral communication	Level 3	5	Reregistered
Fundamental	8969 Interpret and use information from texts	Level 3	5	Reregistered
Fundamental	8970 Write texts for a range of communicative contexts	Level 3	5	Reregistered
Fundamental	8973 Use language and communication in occupational learning programmes	Level 3	5	Reregistered
Fundamental	9010 Demonstrate an understanding of the use of different number bases and measurement units and an awareness of error in the context of relevant calculations	Level 3	2	Reregistered
Fundamental	9012 Investigate life and work related problems using data and probabilities	Level 3	5	Reregistered

Fundamental	9013 Describe, apply, analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts	Level 3	4	Reregistered
Fundamental	13915 Demonstrate knowledge and understanding of HIV/AIDS in a workplace, and its effects on a business sub-sector, own organisation and a specific workplace	Level 3	4	Registered



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Apply and implement corporate culture

SAQA US ID	UNIT STANDARD TITLE		
119153	Apply and implement corporate culture		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Marketing	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Marketing	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	2	Level 3	Regular

SPECIFIC OUTCOME 1

Maintain the image of the organisation.

SPECIFIC OUTCOME 2

Demonstrate an understanding of and apply company ethics.

SPECIFIC OUTCOME 3

Co-operate with other service suppliers.

SPECIFIC OUTCOME 4

Interface and interact with clients.

SPECIFIC OUTCOME 5

Demonstrate an understanding of an organisational structure.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Control and maintain venue equipment and assets

SAQA US ID		UNIT STANDARD TITLE	
119158		Control and maintain venue equipment and assets	
SGB NAME		NSB 03	PROVIDER NAME
SGB Marketing		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Marketing
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	3	Level 3	Regular

SPECIFIC OUTCOME 1

Set-up for events.

SPECIFIC OUTCOME 2

Comply with maintenance policies and procedures.

SPECIFIC OUTCOME 3

Operate basic equipment used at exhibition sites.

SPECIFIC OUTCOME 4

Care for moveable and immovable organisational assets.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Describe the features of the exhibition industry

SAQA US ID	UNIT STANDARD TITLE		
119165	Describe the features of the exhibition industry		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Marketing	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Marketing	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	2	Level 3	Regular

SPECIFIC OUTCOME 1

Define the exhibition industry.

SPECIFIC OUTCOME 2

Describe how an exhibition works.

SPECIFIC OUTCOME 3

Understand the marketing benefits of exhibiting.

SPECIFIC OUTCOME 4

Identify and describe the role players in the exhibition industry.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Explain exhibition services

SAQA US ID	UNIT STANDARD TITLE		
119152	Explain exhibition services		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Marketing	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Marketing	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	4	Level 3	Regular

SPECIFIC OUTCOME 1

Explain the various services required by exhibitors and organisers.

SPECIFIC OUTCOME 2

Explain the exhibitor manual.

SPECIFIC OUTCOME 3

Explain the different stand options available to exhibitors.

SPECIFIC OUTCOME 4

Explain the relationship between service suppliers, organisers and exhibitors.

SPECIFIC OUTCOME 5

Explain build-up and breakdown procedures pertaining to service suppliers.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Explain the role of design in the exhibition industry and general design awareness

SAQA US ID	UNIT STANDARD TITLE		
119164	Explain the role of design in the exhibition industry and general design awareness		
SGB NAME	NSB 03	PROVIDER NAME	
SGB Marketing	Business, Commerce and Management Studies		
UNIT STANDARD TYPE	FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Business, Commerce and Management Studies	Marketing	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	4	Level 3	Regular

SPECIFIC OUTCOME 1

Understand and apply design process fundamentals.

SPECIFIC OUTCOME 2

Interpret 2D design diagrams orally.

SPECIFIC OUTCOME 3

Comply with design deadlines.

SPECIFIC OUTCOME 4

Produce single stand design.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Research and process data on stakeholders in the exhibition industry

SAQA US ID		UNIT STANDARD TITLE	
119132		Research and process data on stakeholders in the exhibition industry	
SGB NAME		NSB 03	PROVIDER NAME
SGB Marketing		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Marketing
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	3	Level 3	Regular

SPECIFIC OUTCOME 1

Identify stakeholders in the exhibition industry.

SPECIFIC OUTCOME 2

Conduct research on types of exhibitions and their venues.

SPECIFIC OUTCOME 3

Conduct research on location of venues for different exhibitions.

SPECIFIC OUTCOME 4

Capture and edit exhibition industry data.



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Provide on-site exhibition support

SAQA US ID		UNIT STANDARD TITLE	
119136		Provide on-site exhibition support	
SGB NAME		NSB 03	PROVIDER NAME
SGB Marketing		Business, Commerce and Management Studies	
UNIT STANDARD TYPE		FIELD DESCRIPTION	SUBFIELD DESCRIPTION
Regular		Business, Commerce and Management Studies	Marketing
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	3	Level 4	Regular

SPECIFIC OUTCOME 1

Assist in the organiser's office during the build-up.

SPECIFIC OUTCOME 2

Assist with function co-ordination during the exhibition.

SPECIFIC OUTCOME 3

Provide assistance at enquiries desks at exhibitions.

SPECIFIC OUTCOME 4

Assist in the organiser's office during break-down.

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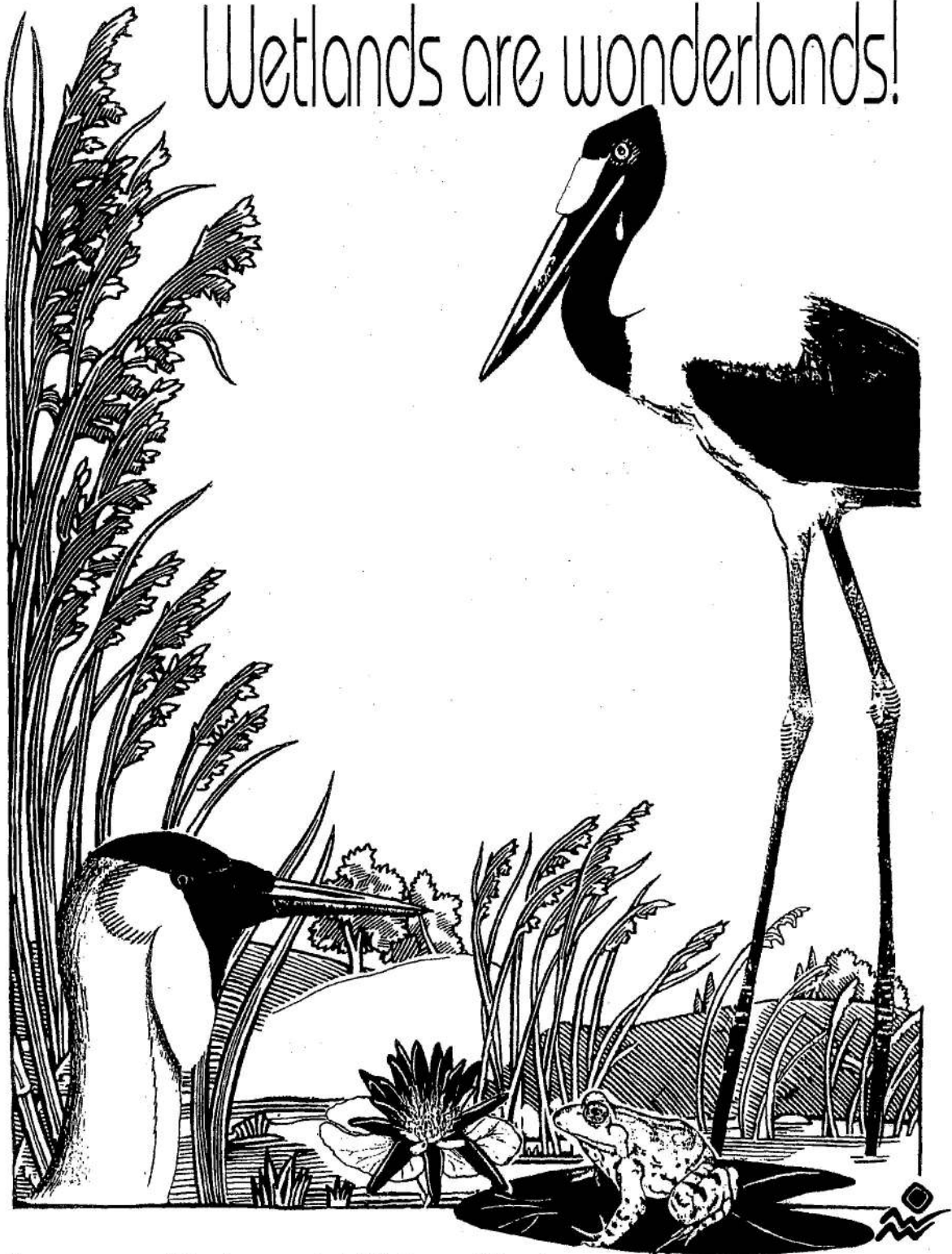
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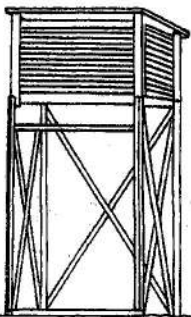
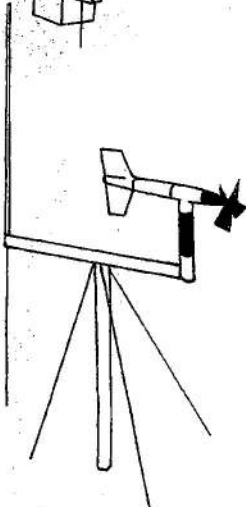
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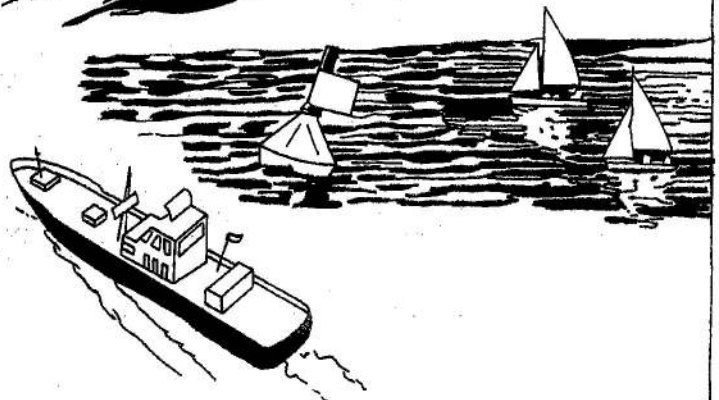
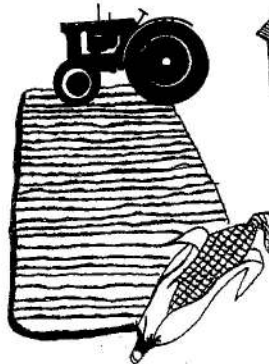
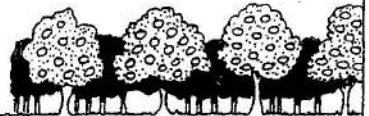
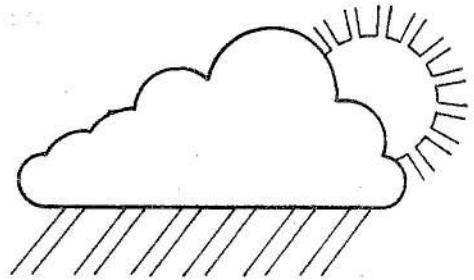
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