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GOVERNMENT NOTICES

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

No. 243   23 March 2007

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

Integrated Health Professions

registered by Organising Field 09 – Health Sciences and Social Services, publishes the following qualification for public comment.

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

Comment on the qualification should reach SAQA at the address *below and no later than 23 April 2007*. All correspondence should be marked **Standards Setting – Integrated Health Professions** addressed to

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DR. S. BHIKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:
National Diploma: Health and Skincare

SAQA QUAL ID	QUALIFICATION TITLE		
58310	National Diploma: Health and Skincare		
SGB		**PROVIDER**	
SGB Integrated Health Professions			
ETQA			
QUALIFICATION TYPE	**FIELD**	**SUBFIELD**	
National Diploma	9 - Health Sciences and Social Services	Promotive Health and Developmental Services	
ABET BAND	**MINIMUM CREDITS**	**NQF LEVEL**	**QUAL CLASS**
Undefined	266	Level 5	Regular-ELOAC
REGISTRATION STATUS	**SAQA DECISION NUMBER**	**REGISTRATION START DATE**	**REGISTRATION END DATE**
Draft - Prep for P Comment			

PURPOSE AND RATIONALE OF THE QUALIFICATION

Purpose:

This qualification will enable the qualifying learner to function as a member of a multi-disciplinary team as a multi-skilled health and skincare practitioner. The learner will be skilled in visual, tactile, verbal and assessment skills to ascertain the client's body and integumentary needs, in order to analyse the client's state of health, and formulate a specific regime or protocol for the treatment, prevention and/or maintenance of well being in the client.

Learners accredited with this qualification will be able to:

• Apply communication skills to provide effective health and skincare treatments.
• Demonstrate applied knowledge of microbiology, anatomy, physiology, physics, chemistry and psychosocial sciences.
• Plan, implement and evaluate health and skincare treatments based on a holistic assessment of the client.
• Participate in the promotion of holistic health care.
• Maintain professionalism in health and skincare practice.
• Participate and/or manage a health and skincare establishment.

Rationale:

The health and skincare practitioner will be able to provide and promote effective skin and body care treatments within the health and skincare field by:

• Assisting at community level in promoting primary health care initiatives.
• Providing entrepreneurial skills and self-employment opportunities.
• Qualified practitioners contributing to general health education of communities.

A healthy life-style management is now required by most, if not all, medical aid organizations. Not all people enjoy organised exercise, but the same stress release and improvement of self-esteem may be obtained through regular, effective skin and body-care treatments.

There is an international trend towards wellness vacations, such as spa breaks a type of relaxation enjoyed by both sexes. The existence of such spas will add value to the tourist industry's marketing strategy.

Two-income families have become the norm and mothers with the demands of growing children prefer to work at or near home. Thus the establishment of health and skincare businesses as SMMEs in the suburban areas contributes to the local economy.

Health and skincare feeds into other health science fields. Many medical practitioners - both general practitioners and specialists - are including alternative health as a part of their treatment regimes.

Health and Skincare competency contributes to employment opportunities in the cosmetic industry - one of the largest retail/commercial industries in both relatively developed and developing countries. There is an ever-increasing need for health and skin care therapists in previously disadvantaged communities; thus it is essential to ensure quality qualifications on the NQF.

The Learning Pathway from the cosmetology aspect would thus be as follows:

- NC: Beauty Technology: NQF L3.
- FETC: Cosmetology: NQF L4.
- N Dip: Health and Skin Care Therapy: NQF L5.
- N Dip: Somatology: NQF L6.
- B Tech: Somatology: NQF L7.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED TO BE IN PLACE
Learners enrolling for this qualification should have successfully completed 12 years of formal schooling equivalent to NQF level 4 and be competent in the following:

- Mathematical literacy at NQF level 4.
- Communication skills at NQF level 4.
- Computer literacy at NQF level 4.
- Proven competency in the following unit standards:
o ID 114801: Demonstrate an understanding of the structure, growth and disorders of the skin, nails and hair.
o ID 115172: Prepare and perform a basic facial.
o ID 115071: Prepare and perform a relaxing face and décolleté massage.
o ID 115070: Demonstrate and apply the knowledge of basic application of special make-up techniques.

Recognition of Prior Learning:

This qualification may be achieved wholly or in part through recognition of prior learning, in terms of compliance with the competencies indicated in the defined exit level outcomes of the qualification. Evidence may be presented in various ways, including verified previous qualifications, testimonials, work records, portfolios, videos of practice and performance records.

QUALIFICATION RULES
- All 30 Fundamental component credits are compulsory. The fundamental component comprises the occupational health and safety and the professional ethics competencies at NQF Level 5.

• All 221 Core component credits are compulsory. The core component comprises the communication, sciences, assessment, massage, management, and community work competencies at NQF Level 5 or above.

• A minimum of 15 credits is required in the Elective component. The elective component credits must be made up of any relevant area of learning that will enhance the qualification and enrich the field of somatology for the learner. The learner's choice of elective component credits must be made in agreement with the provider and the relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA. The elective learning credits should be at NQF Level 5 or above.

EXIT LEVEL OUTCOMES
1. Apply the relevant occupational health and safety legislation in the health and skin care environment.

2. Apply Professional Ethics in client interventions.

3. Apply communication skills to provide effective health and skincare treatments.

4. Apply knowledge of microbiology, anatomy, physiology, pathology, physics and chemistry during all client interventions.

5. Apply knowledge of nutrition, body alignment and movement in client care.

6. Plan, implement and evaluate health & skincare treatments based on a holistic assessment of the client.
o Range of treatment: Electrical equipment includes: steamers; vacuum suction; light applicators, hi-frequency; faradic type; galvanic; interferential; gyrators.
o Range of treatment: Products: At least 3 complete professional skin and body ranges.
o Range of treatment: Pre-treatment.

7. Perform a holistic massage.
o Range: Holistic massage includes face; neck; décolleté; abdomen; back; upper limbs and hands; lower limbs and feet.

8. Apply management skills in a health and skincare establishment.

9. Provide health and skin care to the broader community.
o Range: Broader community includes: retail marketing points; spas; salons; clinics; health institutions and institutions for the underprivileged and the elderly.
o Note: Community interventions may take the form of case studies.

Critical Cross-Field Outcomes:

• Identify and solve problems in order to plan and perform successful treatments on a range of clients.
o Evident in Exit Level Outcome/s 4, 5.

• Work effectively with others as a member of a team, group, organization and community by booking, preparing and completing various treatments within a Health and Skincare environment.
o Evident in Exit Level Outcome/s 8, 9.

• Organize and manage oneself and one's activities responsibly, effectively and efficiently but still paying full attention to the needs, comfort and safety of the client at all times.
o Evident in Exit Level Outcome/s 1, 2, 3, 4, 5, 6, 7, 8, 9.

• Collect, analyze, organize and critically evaluate information in order to perform the most suitable treatments.
o Evident in Exit Level Outcome/s 4, 5, 6.

• Communicate effectively in order to give appropriate home care advice to clients, completing client record cards and recommending related treatments and products.
o Evident in Exit Level Outcome/s 3.

• Use science and technology effectively and critically by completing any of the available treatments and using products, tools and equipment in a safe and professional manner.
o Evident in Exit Level Outcome/s 6.

• Understand the world as a set of related systems recognising that problem-solving contexts do not exist in isolation.
o Evident in Exit Level Outcome/s 1, 2, 6, 8, 9.

• Contribute to full personal development: effective learning: social responsibility and sensitivity; entrepreneurial skills.
o Evident in Exit Level Outcome/s 1, 2, 3, 8, 9.

ASSOCIATED ASSESSMENT CRITERIA

1.
• The treatment rooms are maintained in accordance with the required legislation in terms of equipment, products, fire extinguishers, ventilation, lighting and egress.
• A risk-free environment is maintained to ensure the safety of all persons within the workplace by ensuring that all potential hazards are identified and immediately removed.

2.
• The learner displays behaviour in accordance with ethical codes of conduct at all times during client, colleague and general public interactions.

3.
• Communication during interactions with clients is assessed in terms of positive reactions from the clients and the outcomes achieved.
• Psychosocial knowledge is assessed through the attitudes and skills demonstrated by the learner during all interactions with clients.
• Religious beliefs and cultural taboos are taken into consideration during all planned interventions with clients.
• Client reports are accurate, up-to-date and secured to ensure client privacy.

4.
• Knowledge of the anatomy physiology and biochemistry of all body systems is applied in the provision of health and skincare interventions.
• Knowledge of physics and chemistry is applied in recommending and using products and electrical equipment in health and skincare interventions.
• Knowledge of microbiology and pathology is applied during client assessment in the recognition of any condition that is abnormal.

5.
• Nutritional knowledge is applied during the client assessment and treatment planning, in terms of the specific recommendations for the client.
• A client manifesting with any recognised medical disorder is appropriately referred before any further intervention is carried out.
• An exercise regime is formulated, recommended and demonstrated according to the clients, profile.
• The recommended exercise programme incorporates the safety precautions specific to the condition of the client.

6.
• Clients are assessed in terms of individual needs and the availability of required therapies.
• A treatment plan in terms of indications and contra-indications is discussed with the client and then documented prior to the planned therapy being implemented.
• Required pre-treatment is carried out and treatment is implemented in accordance with the planned actions.
• Immediate reactions of clients to treatments are observed and recorded.
• The expected long-term outcomes of treatments are recorded.
• Should problems outside the scope of health and skincare be identified, the client is referred to a more appropriate resource.

7.
• The massage technique applied demonstrates the five classical movements, acupressure to pressure points and lymph drainage.
• The massage is rhythmic, continuous, sequential and applied with appropriate pressure.

8.
• Knowledge of relevant legislation, regulations and policies is applied in the management of a health and skincare establishment.
• Factors leading to medico-legal risks are identified and actions are taken to prevent risk incidents.
• Marketing, merchandising and selling skills are applied within the ethical codes of the relevant associations.
• A marketing plan to start and manage a business is drawn up and presented.

9.
• The skills and attitudes exhibited during interactions with less privileged community members are respectful, responsible and professional at all times.
• Records of the interventions are recorded to ensure that clients' anonymity is retained.

Integrated Assessment:

Professional association guidelines are used as reference for competence in agreement with the relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.

Formative assessment:

A variety of assessment strategies and/or approaches may be used such as:

• Tests.
• Assignments.
• Workbooks.
• Projects.
• Demonstrations.
• Case studies and experiential learning.

Summative assessment:

May take the form of:

• Written examinations.
• Practical examinations.
• Oral assessment.

INTERNATIONAL COMPARABILITY

There was no professional body in South Africa until the early years of the 21st Century. Collectively, certain schools voluntarily aligned themselves with an international body, viz., Comité International D'Esthéthique et de Cosmétologie,(CIDESCO). CIDESCO is an international, non-profit organization with representation in 35 countries across all continents. Their focus is the co-coordinating of professional activities and training standards in the health and skincare profession in order to maintain the highest principles of conduct and ethics in the industry. Through international congresses, CIDESCO also disseminates information on the newest skincare technology and latest equipment trends and developments.

Other international organizations within the Health and Skincare Profession include:

- International Therapy Examinations Council (ITEC).
- City and Guilds.
- British Association of Beauty Therapy and Cosmetology (BABTAC).
- Confederation of International Beauty Therapy and Cosmetology (CIBTAC).
- South African Association for Health and Skincare Professions (SAAHSP).

SAAHSP - the CIDESCO representative in South Africa - quality assures the national examinations and accredits South African assessors and moderators. SAAHSP represents South Africa in the international arena in areas of education, developing standards and interrogating ethical issues.

In our search to ascertain how South African qualifications and/or unit standards compare with those in the rest of the world, we looked at countries such as United States of America, Australia, New Zealand, the rest of Africa, the United Kingdom, Western Europe and Asia.

We came to the conclusion that the South African qualifications should be regarded as the leading qualifications worldwide. Most of the countries researched offer courses based on unit standards leading to certificates equivalent to our NQF Levels 3 and 4. The only country we could find that has national standards is the United Kingdom.

In New Zealand and Australia, schools have to register under their respective qualifications' authorities. However, no qualifications or unit standards have yet been listed under these NQFs. Beauty Therapy is offered at private colleges, institutes of technology and polytechnics. ITEC, CIBTAC and CIDESCO qualifications are offered. A centrally established and directed national moderation system has been set up by NZQA and they also evaluate any documentation.

In England the qualification authority is EDEXEL and a level 3 NVQ in Beauty Therapy is available. We could not find specified credits. The Vocational Training Charitable Trust (VTCT) offers ITEC, CIBTAC and CIDESCO qualifications and the City & Guilds Diploma in Beauty Therapy.

Switzerland seems to have no national qualifications yet. Schools in Switzerland offer ITEC, CIBTAC, CIDESCO and City & Guilds.qualiciations.

In the USA, no national qualifications exist yet. The National Accrediting Commission for Cosmetology Arts and Sciences (NACCAS), recognized by the US Department of Education, accredits schools.

No Asian country - including India - has national qualifications or standards yet. ITEC, CIBTAC, CIDESCO and City & Guilds.qualiciations are offered throughout Asia.

No African country - other than South Africa - has national qualifications or standards as yet. ITEC, CIBTAC, CIDESCO and City & Guilds are offered in various African countries. However, students from many African countries wishing to study in this field, tend to come to South Africa to study, as SAAHSP is known for its excellent standards throughout the world.

Qualified Health and Skincare Therapists from South Africa are sought after worldwide, as they are multi-skilled in comparison with therapists from other countries, who tend to learn in smaller units. Thus many South Africans are found working in spas and salons around the world and also on international liners.

ARTICULATION OPTIONS
This qualification articulates:

Horizontally:

• With the Diplomas in Therapeutic Aromatherapy or Reflexology, or Therapeutic Massage.

Vertically:

• With the B. Tech: Somatology and downwards with the FETC: Cosmetology.

MODERATION OPTIONS
• Any institution offering learning that will enable achievement of this qualification must be accredited as a provider with relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.

• Anyone assessing a learner against this qualification must be registered as an assessor with the relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.

• Moderation or assessment will be overseen by the relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.

CRITERIA FOR THE REGISTRATION OF ASSESSORS
N/A

NOTES
This qualification is based on exit level outcomes only. To enable the learner to obtain the best possible outcome for this qualification, the following unit standards may be found useful as a means to successfully achieving this qualification:

SAQA ID Number; Unit Standard Title:

• ID 7468; Use mathematics to investigate and monitor the financial aspect of personal business, national and international issues.
• ID 15096; Demonstrate an understanding of stress in order to apply strategies to achieve optimal stress levels in personal and work situations.
• ID 116484; Evaluate a specified code of ethics and/or code of conduct.
• ID 116493; Demonstrate understanding of tolerance in human relations.
• ID 8600; Care for customers.
• ID 115172; Prepare and perform a basic facial.
• ID 10054; Identify and manage areas of customer service impact.
• ID 7788; Process payments.
• ID 115174; Prepare and perform a relaxing back and neck massage.
• ID 8261; Processing stock.
• ID 9015; Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems.

UNIT STANDARDS
This qualification is not based on Unit Standards.

No. 244   **23 March 2007**

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

Rail and Pipeline Operations

registered by Organising Field 11, Services, 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 full qualification and unit standards can be accessed via the SAQA web-site at **www.saqa.org.za**. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the qualification and unit standards should reach SAQA at the address *below and no later than 23 April 2007.* All correspondence should be marked **Standards Setting – Rail and Pipeline Operations** addressed to

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SOUTH AFRICAN QUALIFICATIONS AUTHORITY

SAQA

QUALIFICATION:
National Certificate: Pipeline Operations

SAQA QUAL ID	QUALIFICATION TITLE		
58330	National Certificate: Pipeline Operations		
SGB		PROVIDER	
SGB Rail and Pipeline Operations			
ETQA			
QUALIFICATION TYPE	FIELD	SUBFIELD	
National Certificate	11 - Services	Transport, Operations and Logistics	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUAL CLASS
Undefined	139	Level 5	Regular-Unit Stds Based
REGISTRATION STATUS	SAQA DECISION NUMBER	REGISTRATION START DATE	REGISTRATION END DATE
Draft - Prep for P Comment			

PURPOSE AND RATIONALE OF THE QUALIFICATION
Purpose:

The purpose of this qualification is to instil and maintain service excellence with the focus on safe and efficient working in the field of pipeline transport services.

A learner certified as competent in this qualification will be able to plan and/or schedule the intakes and deliveries for the bulk transportation of liquid products (typically multi or dedicated petroleum products) in, through and out of a pipeline network safely in accordance with company-specific policies, procedures and instructions.

This includes activities such as:

• Utilising pipeline equipment and communication systems.
• Communicating with peers, customers and members of supervisory/management levels by expressing opinions in spoken and written form.
• Planning a product movement forecast.
• Compiling a pipeline operations notice.
• Performing audits of product movements.
• Labelling of products.
• Performing calculations pertaining to estimated times of arrival for:
○ Transmixtures/pigs/spheres/switching/start/stop of intakes and deliveries.
• Calculating product volumes and implementing adjustment as required.

An understanding of the relevant technology is required to enable the learner to make decisions and take responsibility for the execution of the work by obtaining clients' orders and scheduling product movements, by compiling operations notices and shipment programmes and distributing these to the relevant role players.

The understanding of the context in which the particular tasks will be performed will also enable the learner to contribute to safety, health, environmental and quality criteria in the execution of the particular job. This advanced learning will contribute to the full development of the learner and will provide recognition of competency within the pipeline operations environment as well as

the broader transport sector. This qualification forms part of the learning pathway for persons in the pipeline transport industry.

Rationale:

This qualification reflects the need in the pipeline operations industry for personnel with knowledge, skills and understanding to plan/schedule the intakes and deliveries for the bulk transportation of liquid products (typically multi or dedicated petroleum products) in, through and out of a pipeline network.

This qualification reflects the workplace-based needs of pipeline operators working in the pipeline operations industry that is expressed by employers and employees, both now and in the future.

The qualification will provide a means to set standards in the Pipeline Operations industry and will serve to foster professionalism in the Southern African transport industry thereby providing a mechanism for regulating the services rendered.

It will provide the broad knowledge, skills and values needed in the Pipeline industry and will facilitate access to, and mobility and progression within education and training and to progress along a learning path for learners who:

• Have worked in the pipeline operations industry for many years, but have no formal qualification.
• Wish to extend their range of skills and knowledge of the industry so that they can become competent workers in the pipeline operations industry.

The Transport sector and people operating within the pipeline operations industry will benefit from this qualification and its competence standards, which are instrumental to the development and recognition of the foundational, practical and reflective competence (applied competence) required to render effective and efficient pipeline transport services.

These services are essential in and to the following domains:

• Enabling the rendering of a pipeline transport service.
• Enabling the rendering of a transport service.
• Contributing to economic growth.

Central to the qualification is the development of a culture of a safe and efficient pipeline transport service to meet the needs of clients and consumers.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED TO BE IN PLACE
Learners accessing this qualification are assumed competent in:

• Communication at NQF Level 4.
• Mathematical Literacy at NQF Level 4.

Recognition of Prior Learning:

The structure of this Unit Standard-based Qualification makes the recognition of prior learning (RPL) possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Pipeline Operations Qualification.

Learners who already work in the Pipeline Operations industry and who believe that they possess the competencies to enable them to meet all of the outcomes listed in the unit standards will be able to present themselves for assessment against the unit standards of their choice. Once found competent, these learners will be certified as competent and credited accordingly. Recognition of Prior Learning can also be conducted for these learners at qualification level, by means of an Integrated Assessment (see Exit Level Outcomes and associated Assessment Criteria).

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 could include inter alia:

• Written statements from persons (e.g. current and/or previous employers, colleagues, peers, managers, external customers, supervisors) confirming competence of the learner.
• Relevant certificates or awards.
• Previous assessment records.
• Journals/logbook.

RPL will allow for accelerated access to further learning and gaining of credits towards the qualification. All RPL is subject to quality assurance by the relevant ETQA and is conducted by a registered assessor.

Access to the qualification:

Access to this qualification is open to all learners in possession of an FETC or equivalent. It is preferable that learners first complete the FETC: Pipeline Operations before accessing this Qualification.

QUALIFICATION RULES
• All unit standards in the Fundamental Component are compulsory, with 24 credits.

• All unit standard in the Core Component are compulsory, with 83 credits.

• Learners must choose unit standards totalling at least 32 credits from the Elective Component.

• Total credit value of the Qualification is 139 credits.

EXIT LEVEL OUTCOMES
On achieving this qualification the learner will be able to:

1. Generate a long-term product movement notification.

2. Generate a product movement sequencing notification.

3. Reconcile the product volumes of the pipeline network.

4. Plan freight logistics.

Critical Cross-Field Outcomes:

The Critical Cross-Field Outcomes are integrated in the Unit Standards and Assessment Criteria of each Unit Standard.

ASSOCIATED ASSESSMENT CRITERIA

1.
• The product heads from the previous forecast of product movement are obtained and plotted/captured on the new forecast.
• The starting point of product movement forecast is established according to company procedures.
o Range: Start up time, the flow rate, and the supply and delivery client/depot, sequence of injection.
• A forecast of product movement is created and detailed information is inserted/captured.
o Range: Product specific colour codes, slug numbers, times, dates, flow rates and volumes.
• Conditions pertaining to the forecasting of product movements are identified and reported to relevant internal and external role players timeously.

2.
• The position of product heads as per the present status of product in the pipeline is obtained, verified and checked following company requirements.
• The position of product heads is plotted/captured on the detailed plan.
• The starting time of the detailed plan are communicated to all relevant parties.
• A detailed plan of product movement is drawn/created from the information obtained from the updated cycle sheets.
• The detailed plan is verified for correctness and relevant information is inserted to ensure it is up to date.
• The operations notice is captured/exported and distributed to relevant role players.
• Sub-standard conditions pertaining to the detailed planning of product movements are identified, resolved and communicated to relevant internal and external role players.

3.
• Information regarding the reconciliation of product volumes is communicated to all relevant internal and external role players.
• Product movement reports are created by utilising company specific computer software.
• Docket information captured in the company's data system is edited and verified according to recognised policy and procedure.
• Product volumes taken in and/or delivered are reconciled and volumes are adjusted according to company requirements.
• Product adjustments are performed to ensure even distribution of products to clients.

4.
• Optimal transit systems, resources and routes in relation to freight product type, time constraints and profitability are planned and alternative routing, scheduling options are generated and/or explained.
• Plans and strategies are formulated to achieve a given set of short/medium and long-term goals in a freight logistics environment.
• Legislation/regulations and customer requirements appropriate to freight logistics planning are applied at all times.

Integrated Assessment:

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 should be conducted in conjunction with other aspects and should use authentic Pipeline Operations contexts wherever possible.

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. 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 use formative and summative assessment methods and assess combinations of practical, foundational and reflective competencies (applied competence).

Assessors and moderators should use 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.

Formative Assessment:

• This kind of assessment will typically take place during training and merely serves to guide the learner towards full competence.

• Assessment can be done in any agreed upon method of assessment of the knowledge required to perform the various competencies.

• To be allowed access to the final qualifying assessment a learner must show that he/she has reached a level of overall integrated competence.

Summative Assessment:

For the learner to be certified competent against the qualification, he/she must prove overall integration of the competencies expressed in the unit standards. The elements of importance here are overall abilities, problem solving capability and safe working. In addition, assessors should be satisfied that the learner has achieved that level of competence to be able to take charge of any aspect of pipeline operations.

The learner's ability to demonstrate competence against a particular unit standard, under real-life working conditions and in the presence of an assessor, will be assessed. The summative assessment can also be used as a diagnostic assessment tool aimed at identifying the learner's skills gaps.

Workplace Assessment:

Workplaces are used for assessment purposes provided that the appropriate facilities, tools, equipment, and support systems are available and accessible to both the assessor and the learner. The pipeline operations industry agreed on the following requirements for workplace assessment:

• Assessment needs to occur in a familiar environment so that the learner is not asked to cope with different equipment and a strange environment at the time of assessment. (This will not detract from the portability of the generic skill being assessed. Portability will be supported through a short depot or region specific orientation session.).
• Assessment needs to take place at a time and venue mutually agreed to by the assessor and the learner.

INTERNATIONAL COMPARABILITY

Within the South African context a number of petrochemical pipelines exist for the transport of bulk liquid fuel to various clients. Various types of refined products (lead replacement or unleaded petrol and diesel) and volumes (relatively small batches in comparison to larger batches internationally) are transported from the various refineries to the different clients, through the pipeline networks. International role-players operate on a larger scale (monthly cycles) whereas South Africa operates on weekly cycles.

Countries such as Kuwait, Nigeria, Saudi Arabia and others extract crude from wells and transport it either to refineries or to their harbours for exporting purposes. International pipelines have one intake point to one delivery point/terminal where minor or no scheduling is required. In South Africa, however, there are different route options, where pipelines are connected from more than one supply intake point to multiple delivery points (simultaneous flow direction) thus resulting in a unique scheduling process of products. Furthermore, the maximum and minimum product flow rates achievable are influenced by the variation of internal diameter of the pipe in the pipeline network, which has a direct impact on the local scheduling process.

International role-players transport their products (e.g. crude oil, diesel, petrol, etc.) from large storage terminals of which the product is always available. In the South African context however the product is dependent on the supply pattern direct from the refineries which often results in delays which requires short notice re-scheduling of product movements by the pipeline planners. The rescheduling of product movements has a major impact on the scheduling of other pipelines due to the integration of the pipeline network.

The South African petroleum industry has adopted the American Petroleum Institute (API) standards as well as American Standards of Temperature Measurement (ASTM) and these standards are accepted internationally. South Africa, however, has generated its own identification codes for product, clients and station/depots.

Training in Pipeline Operations worldwide is done by individual Pipeline Operators using their own internal training manuals. These manuals are not available to other organisations and generally would not be applicable to the South African situation because of the differences in operations and conditions.

United States of America and Canada adhere to "Best Practice" operationally. However they have no unit standards pertaining to pipeline scheduling.

Critical Controls, a company in Calgary, have developed a scheduling tool for the South African pipeline operations planning/scheduling scenario and the same tool is currently being modified for other international pipeline companies in order to make provision for their unique scenarios. The scheduling tool was developed around the specifications supplied by Petronet (the biggest role-player in South Africa) and make provision for the specific pipeline operations of South Africa. This South African Qualification incorporates the competencies contained in the scheduling tool.

New Zealand and Australia have unit standards for gas pipeline operators which have limited overlap with the National Certificate: Pipeline Operations level 5.

Enbridge in the United Kingdom presents courses in pipeline Operations but the focus is on pipeline Controllers and Co-ordinators and technical maintenance people. They do not contain any training for pipeline operations planners. This Qualification would appear therefore to be unique.

Conclusion:

Each pipeline in South Africa is unique and the scheduling or planning of product movement in that specific pipeline is therefore also unique. The scheduler or planner therefore needs to be

trained or retrained on a continuous basis in order to efficiently plan the product movement in a specific pipeline.

ARTICULATION OPTIONS
The qualification lends itself to both horizontal and vertical articulation possibilities, which allow mobility and progression for the learner.

Horizontal articulation possibilities lie with other qualifications at the same level in the learning area of transport, freight handling, logistics and pipeline operations, for example:

• Certificate: Logistics Management, NQF Level 5.
• Diploma: Logistics Management, NQF Level 5.
• National Certificate: Transport Economics, NQF Level 5.
• National Higher Certificate: Transport Economics, NQF Level 5.
• ID 14590: National Diploma: Freight Handling Logistics, NQF Level 5.

Vertical articulation possibilities can be achieved by continuing up the learning pathway in qualifications in the following disciplines:

• Logistics.
• Transport Economics.
• Transport Management.

The following qualifications are examples of the above:

• Bachelor of Commerce: Transport Economics, NQF Level 6.
• National Diploma: Transport Economics, NQF Level 6.

MODERATION OPTIONS
• This Qualification will be assessed by an assessor and moderated by a moderator registered with the relevant accredited ETQA.

• Assessors should be in possession of a relevant qualification in Pipeline Operations or a related field that is at least one level higher than the level of this Qualification.

• Training providers must be accredited by a relevant ETQA.

CRITERIA FOR THE REGISTRATION OF ASSESSORS
Methods of Assessment:

The following methods of assessment have been identified as the preferred measurement and assessment of learner competence in the assessment criteria:

• Written tests.
• Practical tests.
• Oral assessment methods.
• In-situ (on-the-job) observations.
• Simulation.
• Structured classroom discussions and oral tests.

These methods will be selected carefully based on the purpose of the assessment. For example, the written method will be used to assess knowledge or on-the-job demonstration for practical competence. The assessment must integrate a number of different methods (no less than two of those detailed above) in order to give the assessor reliable and valid proof of competence and evidence of required attitudes.

NOTES
N/A

UNIT STANDARDS

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Core	243844	Compile a pipeline operations notice	Level 5	27
Core	243843	Perform audits of product movements in a pipeline network	Level 5	11
Core	243845	Create a product movement forecast	Level 5	45
Elective	10037	Take orders from customers to fulfil a need for goods and/or service	Level 4	10
Elective	10024	Liaise with a range of customers of a business	Level 4	4
Elective	10053	Manage customer requirements and needs and implement action plans	Level 5	8
Elective	15238	Devise and apply strategies to establish and maintain relationships	Level 5	3
Elective	8046	Communicate at an advanced level and maintaining interpersonal relations	Level 6	20
Elective	8054	Manage and implement quality assurance systems	Level 4	8
Elective	8055	Manage hazardous/dangerous goods logistics	Level 5	15
Elective	8053	Manage freight location and control	Level 5	32
Elective	8050	Administer a freight logistics office	Level 5	8
Elective	15226	Implement systems to meet the flow of information in a team, department or division	Level 5	3
Elective	10025	Handle a range of customer complaints	Level 4	4
Fundamental	9407	Communicate with clients and discuss work	Level 5	5
Fundamental	8052	Plan freight logistics	Level 5	16
Fundamental	7866	Plan, organise and monitor work in own area of responsibility	Level 5	3

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

SAQA

UNIT STANDARD:

Perform audits of product movements in a pipeline network

SAQA US ID	UNIT STANDARD TITLE		
243843	Perform audits of product movements in a pipeline network		
SGB		PROVIDER	
SGB Rail and Pipeline Operations			
FIELD		SUBFIELD	
11 - Services		Transport, Operations and Logistics	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	11
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Extract information regarding product movements to create/generate a report.

SPECIFIC OUTCOME 2
Obtain and check captured docket information in the company's data system.

SPECIFIC OUTCOME 3
Edit and finalise captured docket information in the company's data system.

SPECIFIC OUTCOME 4
Perform product adjustments to reconcile product intake volumes to delivery volumes.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Compile a pipeline operations notice

SAQA US ID	UNIT STANDARD TITLE			
243844	Compile a pipeline operations notice			
SGB		PROVIDER		
SGB Rail and Pipeline Operations				
FIELD		SUBFIELD		
11 - Services		Transport, Operations and Logistics		
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL		CREDITS
Undefined	Regular	Level 5		27
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE		SAQA DECISION NUMBER
Draft - Prep for P Comment				

SPECIFIC OUTCOME 1
Prepare for the detailed planning of product movements through the pipeline network.

SPECIFIC OUTCOME 2
Plan a detailed schedule of product movements through the pipeline network.

SPECIFIC OUTCOME 3
Capture an operations notice.

SPECIFIC OUTCOME 4
Finalise the information on the operations notice.

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SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Create a product movement forecast

SAQA US ID	UNIT STANDARD TITLE		
243845	Create a product movement forecast		
SGB		PROVIDER	
SGB Rail and Pipeline Operations			
FIELD		SUBFIELD	
11 - Services		Transport, Operations and Logistics	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	45
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Prepare for the forecasting of product movements through the pipeline network.

SPECIFIC OUTCOME 2
Plan a product movement forecast.

SPECIFIC OUTCOME 3
Draw and label a product movement forecast.

SPECIFIC OUTCOME 4
Finalise the forecasting of product movements.

No. 245   **23 March 2007**

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

Aerospace Operations

registered by Organising Field 10, Physical, Mathematical, Computer and Life Sciences, publishes the following unit standards for public comment.

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

Comment on the unit standards should reach SAQA at the address *below and no later than 23 April 2007.* All correspondence should be marked **Standards Setting – Aerospace Operations** 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@saqa.org.za

DR. S. BHKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

SAQA

UNIT STANDARD:

Demonstrate an understanding of helicopter aerodynamics

SAQA US ID	UNIT STANDARD TITLE		
243737	Demonstrate an understanding of helicopter aerodynamics		
SGB		PROVIDER	
SGB Aerospace Operations			
FIELD		SUBFIELD	
10 - Physical, Mathematical, Computer and Life Sciences		Physical Sciences	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	12
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Explain the principles of rotor aerodynamics.

SPECIFIC OUTCOME 2
Explain the principles of hovering and horizontal movement.

SPECIFIC OUTCOME 3
Explain the factors involved in forward flight.

SPECIFIC OUTCOME 4
Explain autorotative flight.

SPECIFIC OUTCOME 5
Explain hazardous conditions and recovery from them.

SPECIFIC OUTCOME 6
Explain the power requirements in different flight conditions.

SPECIFIC OUTCOME 7
Explain the stability properties of a helicopter.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Perform advanced manoeuvres and procedures in a helicopter

SAQA US ID	UNIT STANDARD TITLE		
243750	Perform advanced manoeuvres and procedures in a helicopter		
SGB		PROVIDER	
SGB Aerospace Operations			
FIELD		SUBFIELD	
10 - Physical, Mathematical, Computer and Life Sciences		Physical Sciences	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	5
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Turn helicopter steeply during real and or simulated flight operations.

SPECIFIC OUTCOME 2
Perform co-ordination manoeuvres during real and or simulated flight operations.

SPECIFIC OUTCOME 3
Perform advanced ground reference manoeuvres during real and or simulated flight operations.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Perform pre-flight planning for helicopters

SAQA US ID	UNIT STANDARD TITLE		
243752	Perform pre-flight planning for helicopters		
SGB		PROVIDER	
SGB Aerospace Operations			
FIELD		SUBFIELD	
10 - Physical, Mathematical, Computer and Life Sciences		Physical Sciences	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	10
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Plan fuel requirements for a flight.

SPECIFIC OUTCOME 2
Determine helicopter performance.

SPECIFIC OUTCOME 3
Compile a contingency plan.

SPECIFIC OUTCOME 4
Compile a flight plan.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Pilot a multi-engine helicopter in IFR and VFR conditions

SAQA US ID	UNIT STANDARD TITLE		
243755	Pilot a multi-engine helicopter in IFR and VFR conditions		
SGB		PROVIDER	
SGB Aerospace Operations			
FIELD		SUBFIELD	
10 - Physical, Mathematical, Computer and Life Sciences		Physical Sciences	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 6	5
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Identify the effects of failure of an engine on the control and performance of a multi-engine helicopter.

SPECIFIC OUTCOME 2
Taxi a multi-engine helicopter.

SPECIFIC OUTCOME 3
Plan for flight in a multi-engine helicopter.

SPECIFIC OUTCOME 4
Perform take-off in multi-engine helicopter.

SPECIFIC OUTCOME 5
Fly a multi-engine helicopter.

SPECIFIC OUTCOME 6
Manage engine failure during flight.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Perform helicopter take-offs, air taxi, hovering, landings and go-arounds

SAQA US ID	UNIT STANDARD TITLE		
243756	Perform helicopter take-offs, air taxi, hovering, landings and go-arounds		
SGB		PROVIDER	
SGB Aerospace Operations			
FIELD		SUBFIELD	
10 - Physical, Mathematical, Computer and Life Sciences		Physical Sciences	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 5	8
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Perform take-offs during real and or simulated flight operations.

SPECIFIC OUTCOME 2
Perform hovering during real and or simulated flight operations.

SPECIFIC OUTCOME 3
Perform air taxi during real and or simulated flight operations.

SPECIFIC OUTCOME 4
Perform landings during real and or simulated flight operations.

SPECIFIC OUTCOME 5
Perform go-arounds during real and or simulated flight operations.

No. 246　　　　　　　　　　　　　　　　　　　　**23 March 2007**

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

registered by Organising Field 05, Education, Training and Development, 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 full qualification and unit standards can be accessed via the SAQA web-site at **www.saqa.org.za**. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the qualification and unit standards should reach SAQA at the address *below and no later than 23 April 2007.* All correspondence should be marked **Standards Setting – Development** 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@saqa.org.za

DR. S. BHIKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

SAQA

QUALIFICATION:
Further Education Training Certificate: Trade Union Practice

SAQA QUAL ID	QUALIFICATION TITLE		
58337	Further Education Training Certificate: Trade Union Practice		
SGB		PROVIDER	
SGB Development			
ETQA			
QUALIFICATION TYPE	FIELD	SUBFIELD	
Further Ed and Training Cert	5 - Education, Training and Development	Adult Learning	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUAL CLASS
Undefined	150	Level 4	Regular-Unit Stds Based
REGISTRATION STATUS	SAQA DECISION NUMBER	REGISTRATION START DATE	REGISTRATION END DATE
Draft - Prep for P Comment			

PURPOSE AND RATIONALE OF THE QUALIFICATION
Purpose:

The FETC: Trade Union Practice Qualification has been designed to meet the education and training needs of both members, employees in the trade union movement and those aspiring to become involved in trade union activities.

This Qualification will expand the skills and knowledge base of the learner and focus on competencies relating to the history and structure of the trade union movement, clarification of roles and responsibilities within the movement and the rights of workers within the legal framework of the country. The FETC: Trade Union Practice Qualification will also impact positively on social transformation and the promotion of human rights and gender equality.

Through the Elective component of the Qualification, learners will be able to specialise in specific areas related to their work or interest in the trade union sector. The Qualification provides a platform to build the foundation of learning in trade union practice as well as provide access to other related Qualifications. It will also enable learners to receive formal recognition of learning through a registered Qualification.

The Qualification aims to equip learners to:

• Organise strategies to advance trade unionism.
• Understand and advance the rights of workers.
• Understand the relationship between the economy and political power and the formation of social classes.
• Understand the history and impact of the trade union movement in South Africa.

Rationale:

The FETC: Trade Union Practice lays the foundation to formalise current trade union learning and practice. It will provide learners with the necessary knowledge, skills, values and ethos of the trade union movement and help to both build a coherent learning pathway within the trade union sector and ensure articulation with other related disciplines. More specifically, the Qualification formalises the recognition of competencies and will contribute towards developing expertise in both theory and practice in the trade union environment, particularly empowering the shop steward, who carries significant responsibilities at this level in the sector.

This Qualification will contribute to education and training in the trade union movement through challenging current industrial relations training by promoting a trade union perspective in line with world-wide trends and standards. It will also enable learners to promote and protect the rights of workers, and advance economic and social justice. Ultimately, the FETC: Trade Union Practice is aimed at increasing levels of efficiency, effectiveness, coordination and professionalism within the trade union movement.

The FETC: Trade Union Practice Qualification will ensure that the learners acquire the applied competencies and skills contained in the Exit Level Outcomes and will form the basis for further learning both within the sector - which is one of the largest sectors in the country - and outside of it. This Qualification will assist the trade union movement - whose role in economy of South Africa is critical - to make a more meaningful contribution in terms of redress, transformation, promotion of the culture of learning and emphasising the holistic development of learners. In essence, it will strengthen the trade union movement.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED TO BE IN PLACE
Learners must achieve a minimum 23 credits of their choice from the available Elective Unit Standards. It is recommended that learners choose a stream of Electives that link with their chosen career path or specialisation areas.

Recognition of Prior Learning:

The structure of this Qualification makes the Recognition of Prior Learning possible through the assessment of individual Unit Standards. This Qualification may therefore be achieved in part or completely through the recognition of prior learning, which includes formal, informal and non-formal learning and work experience. As part of the provision of recognition of prior leaning, providers are required to develop structured means for the assessment of individual candidates against the Exit Level Outcomes of the Qualification on a case by case basis. Such procedures, and the assessment of individual cases, are subject to moderation by independent assessors.

The same principles that apply to assessment of this Qualification also apply to recognition of prior learning.

The learner should be thoroughly briefed on the mechanism to be used and support and guidance should be provided. Care should be taken that the mechanism used provides the learner with an opportunity to demonstrate competence and is not so onerous as to prevent learners from taking up the recognition of prior learning option towards gaining this Qualification.

If the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Qualification the appropriate credits should be assigned to the learner. Recognition of Prior Learning will be done by means of Integrated Assessment as mentioned above.

This Recognition of Prior Learning may allow:

- Accelerated access to further learning at this or higher levels on the NQF.
- Gaining of credits towards the Exit Level Outcomes.
- Obtaining of this Qualification in part or in whole.

Access to the Qualification:

There is open access bearing in mind the 'Learning assumed to be in place'.

QUALIFICATION RULES
The Qualification is made up of a combination of learning outcomes from Fundamental, Core and Elective components, totalling 150 minimum credits.

- Fundamental: 56 Credits.
- Core: 71 Credits.
- Elective (Minimum): 23 Credits.
- Total: 150 Credits.

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

Fundamental Credits:

- There are 56 credits for the Fundamental component. All the Fundamental Unit Standards are compulsory.

Core:

- 71 credits have been allocated to the Core Unit Standards. All the Core Unit Standards are compulsory.

Electives:

- Learners must achieve a minimum 23 credits of their choice from the available Elective Unit Standards. It is recommended that learners choose a stream of Electives that link with their chosen career path or specialisation areas.

EXIT LEVEL OUTCOMES
On achieving this Qualification, the learner will be able to:

1. Gather and use information relating to trade unions.

2. Implement strategies to organise workers.

3. Promote the rights of workers.

4. Understand the relationship between the economy, power and the formation of social classes.

5. Understand the history and impact of the trade union movement in South Africa.

ASSOCIATED ASSESSMENT CRITERIA
1.
- Sustained oral communication is engaged in and spoken texts can be evaluated and responded to in a trade union context.
- Written reports are produced over a wide range of contexts.

• A variety of texts are read, analysed and responded to according to organisational requirements.
• Mathematics is used correctly in business calculations within a trade union environment.
• Mathematical computations are correctly used in personal everyday situations mentally and/or using a calculator.

2.
• A conceptual understanding of trade unions in South Africa is understood in terms of respective philosophy, ideological orientation and function.
• Recruitment is conducted using relevant trade union movement strategies.
• Mobilisation strategies are identified and applied appropriately to ensure that workers are fully aware of developments in the sector.
• Relevant administrative skills and resources are managed in the recruitment and mobilisation of workers.

3.
• Knowledge regarding current labour legislation is understood and applied to specific contexts.
○ Range: Legislation pertaining to labour includes but is not limited to the Labour Relations Act, Basic Conditions of Employment Act, Occupation Health and Safety Act.
• The Bill of Rights is explained in terms of how it impacts on workers.
• Workers are advised and represented in disputes in the workplace.
• Procedures are followed in dispute resolution in order to protect the interests of workers.

4.
• The concepts of politics and economy are explained within the trade union context.
• The relationship between politics and economy is explained using examples.
• Social divisions are described in terms of their origins and impact on society.
• The impact of power relations on society is explained in terms of the relationship between the state and the labour movement.

5.
• The history of the trade movement is described to illustrate its genesis, necessity and function in societies.
• Defining moments in the trade union history are identified and their impact described to show their role in the struggle for liberation.
• The relationship between the South African trade union movement and international trade unions is explored to show similarities and differences.
• The historical, cultural and traditional relationships within South African trade unions is analysed using examples.

Integrate Assessment:

The importance of integrated assessment is to confirm that the learner is able to demonstrate applied competence (practical, foundational and reflexive) and ensure that the purpose of this Qualification is achieved. Both formative and summative assessment methods and strategies are used to ensure that Exit Level outcomes and the purpose of this Qualification are achieved.

Formative assessment is an on-going process which is used to assess the efficacy of the teaching and learning process. It is used to plan appropriate learning experiences to meet the learner's needs. Feedback from assessment informs both teaching and learning. If the learner has met the assessment criteria then s/he has achieved the Exit Level Outcomes of the Qualification.

Summative assessment is concerned with the judgement of the learning in relation to the Exit Level Outcomes of the Qualification. Such judgement must include integrated assessment(s) which test the learners' ability to integrate the larger body of knowledge, skills and attitudes, which are represented by the Exit Level outcomes.

Integrated assessment must be designed to achieve the following:

• An integration of the achievement of the Exit Level Outcomes in a way that reflects a comprehensive approach to learning and shows that the purpose of the Qualification has been achieved.
• Judgement of learner performance to provide evidence ao applied competence or capability.

INTERNATIONAL COMPARABILITY

When selecting the counties in this International Comparability Study, it is noted that they were chosen, firstly, because they are all members of the International Labour Organisation (ILO) and they offer training and development which is of the highest standard. Secondly, they were selected because the programmes on offer meet international requirements for the training of trade union members and officials. Nigeria was specifically selected so comparison could be made to an African country as well as a developing nation.

Training Qualifications and Courses referred to were:

Europe:

International Training Centre (Spain, France, Italy and Portugal):

Course Title: Workers Activities.
• International Labour Standards.
• Employment Policies.
• Social Protection.
• Gender and Women Workers' Rights.
• Training Methodology.
• Information Technology.
• Sectoral Programmes for Global Union Federations.

Course Title: Trade Union Training on Collective Bargaining.
• Definition of National and Regional Contexts.
• International Labour Standards and the ILO.
• Collective Bargaining and the Role of Trade Unions.
• Collective Bargaining Levels; Enterprise/sector/regional/national.
• Information Needs.
• Collective Bargaining Techniques.
• Collective Agreements in Industrialised Countries.
• Project Work and Action Plan.

These European courses have a similar focus to the NQF level 4 South African Qualification. In particular, the content focus includes employment policies and international labour standards. However, it is aimed at a higher level than NQF Level 4. The project management module is also aimed at a higher level. The European course also includes an emphasis on information technology.

United States of America:

National Labour College:

Course Title: Organising in the Construction Industry 1:
• Working With Unrepresented Workers.
• Top-down and Bottom-up Tactics.
• Organising and the Law in Construction.
• Identifying Leaders and Building Both Employer-based and Industry-wide Worker Committees.
• One-on-one Skills.
• Communications Strategies, Framing Issues and Motivating Workers.
• Introduction to Strategic Campaigns.

Course Title: Strategic Planning for Construction Organising 2:
• Maximise the Effectiveness of Organising Abilities.
• Promote Efficient Use of Union Resources.
• Develop and apply a Comprehensive Strategy.
• Review Basic Concepts Of Planning and Strategic Targeting.
• Conduct a Power Analysis.
• Strategic Research for Construction Organising.

Course Title: Leaders and Landmark Events of 20th Century Labour History:
• Lives and Influence of Key Labour Leaders.
• Landmark Events and Locations.
• Labour History.

The course content relating to 'Organising in the Construction Industry 1' has additional content when compared to the Level 4 FETC: Trade Union Practice Qualification. For instance, it includes 'Introduction to Strategic Campaigns'. In particular, the focus relates more to the construction industry whereas the level 4 Qualification is much broader and can be applied to all trade union activities.

The course content relating to 'Organising in the Construction Industry 2' compares well with the Level 4 Qualification, although the pitch in some areas is at a higher level than NQF level 4. It also includes additional modules such as 'Conduct a Power Analysis' and 'Strategic Research' which is not included at level 4. This course also focuses specifically on the construction industry and not the trade union movement in general.

The course content relating to 'Leaders and Landmark Events of 20th Century Labour History' compares well also with the competencies of the level 4 Qualification, although it is more comprehensive in detail.

United Kingdom:

National Union for Journalists:

Course Title: Trade Union Training:
• Legislative Changes.
• New Employment Rights.
• Skills to Represent Workers.
• Negotiate with Employers.
• Protect Workers Rights.
• Being a Well Informed Union Representative.

The above course compares well with the South African Level 4 Qualification as all the modules are covered in our Qualification. However, the Level 4 Qualification covers a wider range of subjects and is broader than the specific focus on the Journalism industry.

Switzerland:

Tonga.Online:

Course Title: Trade Union Training:
- Definition of Local and Regional Contexts.
- Basic Computer Training.
- International Labour Standards and the ILO.
- Main Features of Information Technology.
- Evolutions of Labour Patterns.
- Strategic Planning.
- Project Work and Development of an Action Plan Within the Trade Union.

The Tongo Online course is different in that it is an e-learning course and not practical in any way. It has a large focus on information technology and International Standards.

Nigeria:

National Union of Textile, Garment and Tailoring Workers of Nigeria:

Course Title: Trade Union Handbook for Shop Stewards & Branch Executive Officers:
- The Textile Industry.
- Understanding Trade Unionism.
- Structure and Organisation of NUTGTWU.
- Understanding the Collective (Substantive) Agreements.
- Understanding Procedural Agreement.
- Understanding the Collective Bargaining Process.
- Identifying/Tackling Health and Safety Hazards in the Mill.
- Understanding Grievance Handling Procedure.
- Workers Attitude and productivity Improvement in the Mill.
- The Role of Communication in Labour/Management Relations.
- How to make a Case as Shop Stewards and Union Representatives.

The Nigerian course is very focused on one trade union only and is not a general programme of the trade union movement. The content compares well except that more focus is spent on collective bargaining, which is pitched more at level 5 in South Africa.

In conclusion, all the above mentioned courses/programmes compare extremely well to the FETC: Trade Union Practice Qualification, Level 4 as they all form part of the international standards. However, the most notable attribute in the design of this Level 4 Qualification is that it embraces and focuses on the generic competencies for the trade union movement in South Africa as a whole whereas the above programmes are tailored more for specific trade unions. The actual subject matter and modules contained in each course are also similar in nature to the South African Qualification with minor exceptions.

ARTICULATION OPTIONS
Horizontal articulation can be found in the following Qualifications:

- ID 50063: Further Education Training Certificate: Occupational Hygiene and Safety, at NQF Level 4.
- ID 49836: Further Education Training Certificate: Gender Practice, at NQF Level 4.
- ID 49691: Further Education Training Certificate: Human Resources Management and Practices Support, at NQF Level 4.

- ID 23094: Further Education Training Certificate: Development Practice, at NQF Level 4.

Vertical articulation can be found in the following Qualifications:

- ID 23095: Higher Education and Training Certificate: Development Practice, at NQF Level 5.
- ID 49710: National Diploma: Development Practice, at NQF Level 5.
- ID 48641: National Certificate: Labour Relations Practice, at NQF Level 5.
- ID 49784: National Diploma: Labour Relations Practice: Dispute Resolution, at NQF Level 5.
- ID 49257: National Certificate: Conflict Management and Transformation, at NQF Level 5.

MODERATION OPTIONS
- This Qualification will be internally assessed and externally moderated by a moderator registered by the relevant accredited ETQA or an ETQA that has a Memorandum of Understanding with the accredited ETQA. Providers should establish or refine existing moderation procedures and systems at their institutions with a view to aligning them with the requirements of the relevant ETQA.

- The learner's performance/results should be moderated by one or more external moderators. Moderators should report not only on the standard of achievement but also on the validity and reliability of the assessment strategies, design and criteria in relation to the purpose and Exit Level Outcomes of the Qualification.

- Moderators must be competent at the level of the Qualification and registered with the relevant accredited ETQA to ensure that the standard is consistent. Moderators must also be registered assessors with the relevant ETQA. A relevant accredited ETQA will monitor and quality assure moderation and assessment according to the guidelines in the Qualification.

CRITERIA FOR THE REGISTRATION OF ASSESSORS
- Relevant Qualification at NQF level 4 or higher.
- Registration as an assessor with the relevant ETQA.

NOTES
N/A

UNIT STANDARDS

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Core	242816	Conduct a structured meeting	Level 4	5
Core	243850	Demonstrate an understanding of political economy	Level 4	10
Core	243848	Demonstrate an understanding of the trade union movement	Level 4	6
Core	243852	Demonstrate an understanding of the role and function of financial management in the trade union environment	Level 4	8
Core	243846	Demonstrate an understanding of working class theories	Level 4	6
Core	243849	Explain the current legal framework for the trade union environment	Level 4	10
Core	243853	Plan and administer trade union activities	Level 4	5
Core	243851	Promote gender equality and women's empowerment in employment	Level 4	5
Core	243847	Organise and mobilise workers	Level 4	12
Core	120344	Demonstrate knowledge and understanding of relevant current occupational health and safety legislation	Level 4	4
Elective	120300	Analyse leadership and related theories in a work context	Level 5	8
Elective	13943	Analyse new developments reported in the media that could impact on a business sector or industry	Level 4	10
Elective	120385	Apply a range of project management tools and techniques	Level 4	7
Elective	119939	Conduct negotiations in labour mediation	Level 5	6

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Elective	120366	Demonstrate understanding of the implementation of occupational health, safety and environmental legislation in the work place	Level 4	9
Elective	120384	Develop a simple schedule to facilitate effective project execution	Level 4	8
Elective	123394	Develop outcomes-based learning programmes	Level 5	10
Elective	110052	Understand and apply theories and principles of transformative development practice	Level 4	12
Elective	110054	Select and use learning support materials in development practice	Level 4	8
Elective	115414	Perform support functions for media liaison, publicity campaigns and corporate social investment programmes	Level 4	9
Elective	117156	Interpret basic financial statements	Level 4	4
Elective	116481	Identify between morally acceptable and unacceptable behaviour	Level 3	6
Elective	110000	Generate information and reports for internal and external use	Level 4	10
Elective	115823	Gather and manage information for decision-making	Level 5	5
Elective	110055	Facilitate learning in development practice	Level 4	14
Elective	120389	Explain and apply the concept, principles and theories of motivation in a leadership context	Level 4	6
Elective	117927	Use a Graphical User Interface (GUI)-based database application to solve a given problem	Level 4	6
Elective	120390	Develop and apply a service culture to a leadership role	Level 4	8
Elective	14667	Describe and apply the management functions of an organization	Level 4	10
Elective	117870	Conduct targeted training and development using given methodologies	Level 4	10
Elective	120391	Apply leadership skills to relationship management	Level 4	8
Fundamental	119472	Accommodate audience and context needs in oral/signed communication	Level 3	5
Fundamental	119457	Interpret and use information from texts	Level 3	5
Fundamental	119465	Write/present/sign texts for a range of communicative contexts	Level 3	5
Fundamental	119467	Use language and communication in occupational learning programmes	Level 3	5
Fundamental	119462	Engage in sustained oral/signed communication and evaluate spoken/signed texts	Level 4	5
Fundamental	119469	Read/view, analyse and respond to a variety of texts	Level 4	5
Fundamental	119459	Write/present/sign for a wide range of contexts	Level 4	5
Fundamental	119471	Use language and communication in occupational learning programmes	Level 4	5
Fundamental	7468	Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	Level 4	6
Fundamental	9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	Level 4	6
Fundamental	9016	Represent analyse and calculate shape and motion in 2- and 3-dimensional space in different contexts	Level 4	4

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Demonstrate an understanding of working class theories

SAQA US ID	UNIT STANDARD TITLE		
243846	Demonstrate an understanding of working class theories		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Adult Learning	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	6
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Explain the foundations that underpin working class theories.

SPECIFIC OUTCOME 2
Describe working class history and struggle and how it impacts on the trade union movement.

SPECIFIC OUTCOME 3
Describe the role and purpose of trade union organisations in advancing working class theory.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Organise and mobilise workers

SAQA US ID	UNIT STANDARD TITLE		
243847	Organise and mobilise workers		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Higher Education and Training	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	12
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Recruit and service workers.

SPECIFIC OUTCOME 2
Develop and implement organising strategies to strengthen union membership.

SPECIFIC OUTCOME 3
Represent interests of workers.

SPECIFIC OUTCOME 4
Manage a plan of action.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Demonstrate an understanding of the trade union movement

SAQA US ID	UNIT STANDARD TITLE		
243848	Demonstrate an understanding of the trade union movement		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Adult Learning	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	6
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Describe the history of the trade union movement.

SPECIFIC OUTCOME 2
Analyse trade union culture and practice.

SPECIFIC OUTCOME 3
Describe the structures and roles of the trade union movement.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Explain the current legal framework for the trade union environment

SAQA US ID	UNIT STANDARD TITLE		
243849	Explain the current legal framework for the trade union environment		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Adult Learning	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	10
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Identify and describe current legislation relevant to workers' rights in South Africa.

SPECIFIC OUTCOME 2
Explain how legislation is applied in the workplace.

SPECIFIC OUTCOME 3
Explain the impact of labour law in relation to trade unions in the workplace.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Demonstrate an understanding of political economy

SAQA US ID	UNIT STANDARD TITLE			
243850	Demonstrate an understanding of political economy			
SGB		PROVIDER		
SGB Development				
FIELD		SUBFIELD		
5 - Education, Training and Development		Adult Learning		
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL		CREDITS
Undefined	Regular	Level 4		10
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE		SAQA DECISION NUMBER
Draft - Prep for P Comment				

SPECIFIC OUTCOME 1
Describe elementary concepts of economics in relation to political economy.

SPECIFIC OUTCOME 2
Compare contemporary economic systems.

SPECIFIC OUTCOME 3
Describe how property ownership influences the formation of social classes.

SPECIFIC OUTCOME 4
Understand political economy of South Africa and the global context.

SAQA

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Promote gender equality and women's empowerment in employment

SAQA US ID	UNIT STANDARD TITLE		
243851	Promote gender equality and women's empowerment in employment		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Higher Education and Training	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	5
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Explain and use terminology related to gender equality and women's empowerment.

SPECIFIC OUTCOME 2
Demonstrate an understanding of the relationships between race, class and gender and how they impact on gender inequality and discrimination in the workplace.

SPECIFIC OUTCOME 3
Collect and prepare information on gender issues in a workplace.

SPECIFIC OUTCOME 4
Identify strategies and techniques to transform discriminatory practices in the workplace.

SPECIFIC OUTCOME 5
Negotiate collective agreements that aim to transform discrimination and promote women's empowerment.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

SAQA

UNIT STANDARD:

Demonstrate an understanding of the role and function of financial management in the trade union environment

SAQA US ID	UNIT STANDARD TITLE		
243852	Demonstrate an understanding of the role and function of financial management in the trade union environment		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Adult Learning	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	8
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Analyse and interpret basic financial statements in a trade union context.

SPECIFIC OUTCOME 2
Interpret financial statements in a range of contexts from a trade union perspective.

SPECIFIC OUTCOME 3
Explain the meaning and practice of social accounting in an organisation.

SPECIFIC OUTCOME 4
Use the evidence in financial statements to inform decision-making and future action.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Plan and administer trade union activities

SAQA US ID	UNIT STANDARD TITLE		
243853	Plan and administer trade union activities		
SGB		PROVIDER	
SGB Development			
FIELD		SUBFIELD	
5 - Education, Training and Development		Higher Education and Training	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	5
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Perform operational functions in a trade union.

SPECIFIC OUTCOME 2
Manage information regarding storage and retrieval.

SPECIFIC OUTCOME 3
Manage the day-to-day operations in a trade union.

No. 247   **23 March 2007**

SAQA

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

HET Accountancy and Financial Management

registered by Organising Field 03 – Business, Commerce and Management, 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 full qualification and unit standards can be accessed via the SAQA web-site at **www.saqa.org.za**. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the qualification and unit standards should reach SAQA at the address below and *no later than 23 April 2007.* All correspondence should be marked **Standards Setting – HET Accountancy and Financial Management** 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@saqa.org.za

DR. S. BHIKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:
Further Education and Training Certificate: Bookkeeping

SAQA QUAL ID	QUALIFICATION TITLE		
58376	Further Education and Training Certificate: Bookkeeping		
SGB		**PROVIDER**	
SGB HET Accountancy and Financial Management			
ETQA			
QUALIFICATION TYPE	**FIELD**	**SUBFIELD**	
Further Ed and Training Cert	3 - Business, Commerce and Management Studies	Finance, Economics and Accounting	
ABET BAND	**MINIMUM CREDITS**	**NQF LEVEL**	**QUAL CLASS**
Undefined	130	Level 4	Regular-Unit Stds Based
REGISTRATION STATUS	**SAQA DECISION NUMBER**	**REGISTRATION START DATE**	**REGISTRATION END DATE**
Draft - Prep for P Comment			

PURPOSE AND RATIONALE OF THE QUALIFICATION
Purpose:

The purpose of this qualification is to:

• Provide the learner with the knowledge, understanding, skills and experience to become a Bookkeeper to Financial Statements. This will aid individual development and enhance the employment prospects of the learner, as well as social transformation through the formal acknowledgement of competencies, skills and knowledge.
• Equip the learners with a Qualification that can be used in the field of Accounting. Successful completion of this qualification will give the learner the knowledge and skills required not only to perform his/her Accounting job efficiently, but also to proceed on a path of life-long learning with Qualifications at a higher level.
• Provide employers and others with an adequate basis for assuring that those learners gaining the Qualification are competent to act as Bookkeepers, providing Accounting and Financial Management support in medium to large organisations or to act as the senior Bookkeeper in a smaller organisation under the supervision of an outsourced Chartered Accountant or Accounting Officer.
• Encourage the widest possible access to the Accounting profession and Accounting Qualifications by making it possible for the following learners to obtain a bookkeeping qualification:
○ Those who have performed an Accounting and/or Bookkeeping function in their organisation for some time without a formal Qualification in Accounting.
○ Those who were previously disadvantaged and who were unable to continue their learning in the Further Education Band.
○ Those who have recently taken up a position as a support staff member in an Accounting section of a medium to large organisation.
○ Those who have not acquired the skills and competencies required for learning as Technical Financial Accountants.

Qualifying learners will be able to apply for Associate membership of the Institute of Certified Bookkeepers Ltd.

Rationale:

There is a need for adequate control to be maintained over the financial affairs of companies, which sometimes fail due to inadequate preparation of Financial Statements with costs being allowed to exceed budget and income. This Qualification aims at equipping learners to perform the Accounting function in small organisations and to provide support to Accountants and Financial Managers in medium and large organisations so that the Accounting and Financial Management functions can be performed effectively. As all organisations need to employ people with this knowledge, Bookkeepers to Financial Statements are in short supply.

The nature of the Qualification and the integrated work-place assessment requirements will reduce the amount of non-productive time traditionally associated with workplace training when learners enter the world of work as Bookkeepers in medium to large organisations and as senior Bookkeepers in small organisations.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED TO BE IN PLACE
Learning Assumed to be in Place:

It is assumed that the learners, accessing this qualification are competent in:

- Communication at NQF Level 3.
- Mathematical Literacy at NQF Level 3.
- Computer Literacy at NQF Level 3.

Recognition of Prior Learning:

This Qualification may be obtained in whole or in part through a process of RPL. Recognition of prior learning means the comparison of the previous learning and experience of a learner howsoever obtained, against the learning outcomes required for this Qualification in terms of the Specific Outcomes and the Exit Level Outcomes of the Qualifications as a whole and crediting the learner with the knowledge and skills and competencies already mastered. The learner will be credited with the Unit Standards already mastered and will not need to prove competence in them again. If competence can be shown in all the outcomes, the complete qualification can be awarded to the candidate.

The assessor applying RPL could use any of the following tools and techniques to assess competence:

- Performance of an accounting task in the workplace.
- Questioning the learner about the task.
- Written evidence that the learner is able to undertake the task in terms of previous work experience.
- Simulation of an accounting task.
- Case studies.
- Preparation of written reports.
- Evidence from workplace appraisal.
- Interpretation of accounting information.
- Evidence of minutes, notes and working papers relating to meetings.
- Verification of completed work.
- Training records.
- Testimonials.
- In-company short courses.
- Certificates and qualifications.

The learner could be required to prepare a portfolio, which will comprise a collection of evidence of prior learning.

Access to the qualification:

Access to the qualification is open, bearing in mind the "learning assumed to be in place" and that the learner must has access to a work environment where bookkeeping functions can be fulfilled.

QUALIFICATION RULES
Fundamental component:

• All Unit Standards in the Fundamental section are compulsory. They total 56 credits. They include unit standards of twenty credits for Communication in a first South African Language and unit standards of twenty credits in a second South African language. Sixteen credits are allocated to Mathematical Literacy.

Core component:

• The Unit Standards in the Core section totalling 38 credits are compulsory.

Elective component:

• Unit Standards with total weighting of 75 credits have been included in this component. The learner is required to select Unit Standards of a minimum of 36 credits to complete the qualification.

EXIT LEVEL OUTCOMES
1. Finalise and interpret accounts.

2. Interpret and draft financial statements.

3. Maintain financial records and prepare general ledger accounts.

4. Calculate and record Value Added Tax transactions and complete VAT returns.

5. Establish, maintain and use a computerised bookkeeping system.

Critical Cross-Field Outcomes:

The learner who acquires this qualification should be able to demonstrate ability to:

• Identify and solve problems by thinking and making responsible decisions.
• Work with others as a member of a team.
• Organise and manage him/herself and his/her activities responsibly and effectively.
• Collect, analyse, organise and critically evaluate performance.
• Communicate well using mathematical and language skills.
• Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving situations do not exist in isolation.
• Benefit by full personal development, thus contributing to the social and economic development of South African society at large.

ASSOCIATED ASSESSMENT CRITERIA
1.

• Adjustments to total expenses and purchases of assets are made according to organisational requirements.
• Trading, profit and loss account and balance sheets for a small business are prepared according to legislative requirements.
• A distinction is made between gross profit, net profit and cash in hand in accordance with legislative and organisational regulations.
• Basic liquidity and profitability ratios are calculated according to organisational requirements.

2.
• The basic characteristics of the business and accounting environment are explained with examples.
• Financial statement information is identified and interpreted in relation to organisational goals and objectives.
• Year end financial statements are drafted according to legislative and organisational requirements.
• Informed financial decisions are made using evidence from financial statements.

3.
• Records relating to capital acquisition and disposal are maintained following organisational policies and procedures.
• Records on income and expenditure are kept and maintained according to organisational policies and procedures.
• Information for the preparation of general ledger accounts is collected and collated according to organisational requirements.
• Extended trial balance is prepared according to organisational procedures.

4.
• VAT concepts are defined in relation to legislative policies and procedures.
• The current rules and rates of VAT are applied according to legislative and organisational requirements.
• VAT for cash and credit transactions are calculated and recorded following legislative and organisational procedures.
• VAT records are set up and maintained according to legislative and organisational requirements.
• Complete VAT returns are prepared according to legislative requirements.
• The relevant documentation for submission to the Receiver of Revenue is completed in accordance with legislative requirements.

5.
• Issues associated with data integrity and security are understood and explained with examples.
• Elementary tasks associated with preparing a computerised accounting system are undertaken.
• Practical measures needed to assure accuracy, completeness and confidentiality of data in the computerised bookkeeping system are explained.
• A year-end and reconciliation procedures, interpreting the data and making necessary adjustments to financial data and period end procedures are run.

Integrated Assessment:

Integration implies that theoretical and practical components are assessed together. It also implies that learning in different unit standards could and should be assessed in an integrated way where possible. Integrative assessment techniques may be used to assess multiple specific outcomes within multiple unit standards within the learner's work context. Within each unit standard, the specific outcomes and associated assessment criteria guide the learning process. The assessment determines whether the outcomes have been attained.

Assessments should be flexible and must cater for a wide range of options and contexts. Assessment must be fair, transparent, valid and reliable and should ensure that no learner is disadvantaged.

Assessment of Communication and Mathematical Literacy should be contextually based in accordance with the specialisation and context chosen and applied. Assessment has a formative monitoring function. Formative assessment should be used to assess gaps in the learner's skill and knowledge level. Its goal is to assess the learner's competence providing feedback to both learner and facilitator for further learning. It is continuous and is used to plan appropriate learning experiences to meet the learner's needs. It provides information about problems experienced at different stages in the learning process.

Assessment must also have a summative component. Summative assessment may be used on completion of a unit standard, but should not be the only form of assessment.

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. Where it is not possible to assess all competencies in the workplace, simulations, case studies and other techniques should be used to provide a context appropriate to the assessment.

INTERNATIONAL COMPARABILITY
International benchmarking took place throughout the project in:

- The standards writing approach.
- The contents of the standards themselves.
- The appropriateness of the chosen standards format.

Benchmarking was done on qualifications from Britain, Mozambique, Malawi, Bahamas, Namibia and New Zealand.

In Britain there are two qualifications, which closely match the outcomes of this FETC, namely the Level 3 Certificate in Bookkeeping (100/2872/9) and the Level 3 Diploma in Accounting and Advanced Bookkeeping (100/2873/0) registered with the Qualifications Curriculum Authority and awarded by the International Association of Bookkeepers (IAB). In addition this qualification is being offered in the following countries: Russia, Estonia, Latvia, Lithuania, Kazakhstan, Ukraine and Sri Lanka.

A review of qualifications in Bookkeeping offered in the Bahamas showed that the accounting outcomes of this qualification fairly represent the outcomes of the qualification "Certified Professional Bookkeeping" offered by Galilee College which is registered with the Bahamas Ministry of Education and approved by the Bahamas Department of Public Personnel.

The Eastern Central and Southern African Federation of Accountants (ECSAFA) is a regional body whose objects, inter alia, are to co-ordinate development of the accountancy profession and the promotion of internationally recognised standards of professional competence and conduct within the region.

The following unit standards were mapped against the "Occupational Standards for Accounting Technicians in the ECSAFA region and found to be a total match:

Unit Standard No; Title; ECSAFA Unit No:

- 13015; Draft Financial Statements; Unit 11.
- 12995; Maintain financial records and prepare general ledger accounts; Unit 5.
- 12994; Supply cost information for management control; Unit 4.
- 12996; Record, analyse and prepare cost information; Unit 6.

• 1300; Contribute to the planning and allocation of resources within an accounting framework; Unit 9.

This qualification and its unit standards compare favourably with similar qualifications offered internationally.

ARTICULATION OPTIONS
This Qualification articulates horizontally with the following Qualification:

• ID 48736: National Certificate: Small Business Financial Management, NQF Level 4.

The Qualification articulates vertically with the following Qualifications:

• ID 36213: National Diploma: Technical Financial Accounting, NQF Level 5.
• ID 23618: Certificate: Office Administration, NQF Level 5.
• ID 24418: Certificate: Business Accounting, NQF Level 5.
• Certificate: Accounting Technician, NQF Level 5.

MODERATION OPTIONS
• Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with a relevant ETQA or 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 Association with the relevant ETQA.

• Assessment and moderation of assessment will be overseen by the relevant ETQA or by an ETQA that has a Memorandum of Understanding with 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.

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

Formative assessment will be conducted internally by the provider with moderation being done by the relevant ETQA.

CRITERIA FOR THE REGISTRATION OF ASSESSORS
Anyone performing assessment to determine competence for this Qualification should:

• Hold a qualification in Bookkeeping that is registered at NQF Level 5 or above.
• Be registered as an assessor with the relevant ETQA.
• Be currently employed in the Accounting field.

NOTES
N/A

UNIT STANDARDS

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Core	13015	Draft financial statements	Level 5	12

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Core	12995	Maintain financial records and prepare general ledger accounts	Level 5	12
Core	120106	Compile elementary accounting reports	Level 3	10
Core	117156	Interpret basic financial statements	Level 4	4
Elective	12994	Supply costing information for management control	Level 5	8
Elective	243943	Maintain data integrity and security	Level 4	3
Elective	243942	Run year end and reconciliation procedures	Level 4	5
Elective	10022	Comply with organisational ethics	Level 4	4
Elective	114735	Perform Value Added Tax calculations and complete returns	Level 4	5
Elective	110528	Compile and control a budget for a range of office supply requirements	Level 5	4
Elective	13000	Contribute to the planning and allocation of resources within an accounting framework	Level 5	10
Elective	116940	Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem	Level 3	6
Elective	117927	Use a Graphical User Interface (GUI)-based database application to solve a given problem	Level 4	6
Elective	114733	Complete PAYE documents	Level 4	7
Elective	243945	Setting up the system	Level 4	3
Elective	243944	Administer accounts receivable and accounts payable on the system	Level 4	4
Elective	12996	Record, analyse and prepare cost information	Level 5	10
Fundamental	119472	Accommodate audience and context needs in oral/signed communication	Level 3	5
Fundamental	119467	Use language and communication in occupational learning programmes	Level 3	5
Fundamental	119457	Interpret and use information from texts	Level 3	5
Fundamental	119465	Write/present/sign texts for a range of communicative contexts	Level 3	5
Fundamental	9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	Level 4	6
Fundamental	119462	Engage in sustained oral/signed communication and evaluate spoken/signed texts	Level 4	5
Fundamental	7468	Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	Level 4	6
Fundamental	119469	Read/view, analyse and respond to a variety of texts	Level 4	5
Fundamental	9016	Represent analyse and calculate shape and motion in 2- and 3-dimensional space in different contexts	Level 4	4
Fundamental	119471	Use language and communication in occupational learning programmes	Level 4	5
Fundamental	119459	Write/present/sign for a wide range of contexts	Level 4	5

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Run year end and reconciliation procedures

SAQA US ID	UNIT STANDARD TITLE		
243942	Run year end and reconciliation procedures		
SGB		PROVIDER	
SGB HET Accountancy and Financial Management			
FIELD		SUBFIELD	
3 - Business, Commerce and Management Studies		Finance, Economics and Accounting	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	5
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Deal with recurring payments and receipts and adjust accounts for accruals, pre-payments and depreciation using automated facilities where available.

SPECIFIC OUTCOME 2
Complete other period end adjustments.

SPECIFIC OUTCOME 3
Complete period end procedures such as Bank Reconciliation.

SPECIFIC OUTCOME 4
Produce reports of the Profit and Loss Account, Balance Sheet and VAT using correct selection criteria and parameters.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Maintain data integrity and security

SAQA US ID	UNIT STANDARD TITLE		
243943	Maintain data integrity and security		
SGB		PROVIDER	
SGB HET Accountancy and Financial Management			
FIELD		SUBFIELD	
3 - Business, Commerce and Management Studies		Finance, Economics and Accounting	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	3
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Identify the threats to security, data integrity and processing capability.

SPECIFIC OUTCOME 2
Describe the processes designed to maintain the accuracy, completeness and confidentiality of data and continuity of provision.

SPECIFIC OUTCOME 3
Describe recover procedures after loss of security, data integrity or processing capability.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Administer accounts receivable and accounts payable on the system

SAQA US ID	UNIT STANDARD TITLE		
243944	Administer accounts receivable and accounts payable on the system		
SGB		PROVIDER	
SGB HET Accountancy and Financial Management			
FIELD		SUBFIELD	
3 - Business, Commerce and Management Studies		Finance, Economics and Accounting	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	4
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment		.	

SPECIFIC OUTCOME 1
Enter details from sales and purchases invoices and credit notes, including VAT transactions.

SPECIFIC OUTCOME 2
Allocate cheques and cash paid and received to the relevant debtor or creditor account.

SPECIFIC OUTCOME 3
Compile account for discounts received and allowed.

SPECIFIC OUTCOME 4
Update accounts and records.

SPECIFIC OUTCOME 5
Produce account history reports, aged debtor and creditor printouts, statements, remittance advices, cheques and overdue letters.

SPECIFIC OUTCOME 6
Produce all routine and non-routine reports using correct selection criteria and parameters.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Setting up the system

SAQA US ID	UNIT STANDARD TITLE		
243945	Setting up the system		
SGB		PROVIDER	
SGB HET Accountancy and Financial Management			
FIELD		SUBFIELD	
3 - Business, Commerce and Management Studies		Finance, Economics and Accounting	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 4	3
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Draft - Prep for P Comment			

SPECIFIC OUTCOME 1
Initialise the system with the company parameters.

SPECIFIC OUTCOME 2
Maintain up to date and accurate master and account details by creating, amending and deleting master as necessary.

SPECIFIC OUTCOME 3
Create records accurately and speedily.

SPECIFIC OUTCOME 4
Produce routine and non-routine reports using correct selection criteria and parameters.

No. 248   **23 March 2007**

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

HET Accountancy and Financial Management

registered by Organising Field 03 – Business, Commerce and Management, 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 full qualification and unit standards can be accessed via the SAQA web-site at **www.saqa.org.za**. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the qualification and unit standards should reach SAQA at the address below and *no later than 23 April 2007.* All correspondence should be marked **Standards Setting – HET Accountancy and Financial Management** 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@saqa.org.za

DR. S. BHIKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:
National Certificate: Bookkeeping

SAQA QUAL ID	QUALIFICATION TITLE		
58375	National Certificate: Bookkeeping		
SGB		PROVIDER	
SGB HET Accountancy and Financial Management			
ETQA			
QUALIFICATION TYPE	FIELD	SUBFIELD	
National Certificate	3 - Business, Commerce and Management Studies	Finance, Economics and Accounting	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUAL CLASS
Undefined	120	Level 3	Regular-Unit Stds Based
REGISTRATION STATUS	SAQA DECISION NUMBER	REGISTRATION START DATE	REGISTRATION END DATE
Draft - Prep for P Comment			

PURPOSE AND RATIONALE OF THE QUALIFICATION
Purpose:

The purpose of this qualification is to:

• Provide the learner with the knowledge, understanding, skills and experience to become a Bookkeeper. This will aid individual development and enhance the employment prospects of the learner, as well as social transformation through the formal acknowledgement of competencies, skills and knowledge.
• Equip the learner with a Qualification that can be used as an introduction to the field of Accounting. Successful completion of this qualification will give the learner the knowledge and skills required not only to perform his/her Accounting job efficiently, but also to proceed on a path of life-long learning with Qualifications at a higher level.
• Provide employers and others with an adequate basis for assuring that those learners gaining the Qualification are competent to act as Bookkeepers, providing accounting support and recording the day-to-day financial transactions of the business for companies and other organisations.
• Encourage the widest possible access to the Accounting profession and Accounting Qualifications by making it possible for the following learners to obtain a bookkeeping qualification:
○ Those who have performed an Accounting and/or Bookkeeping function in their organisation for some time without a formal Qualification in Accounting.
○ Those who were previously disadvantaged and who were unable to continue their learning in the Further Education Band.
○ Those who are contracted in a learnership agreement in the Accounting sector.
○ Those who have recently taken up a position as a support staff member in an Accounting section of a medium to large organisation.

Rationale:

There is a need for adequate control to be maintained over the financial affairs of companies, which sometimes fail due to inadequate record keeping of creditors and debtors with costs being

allowed to exceed budget and income. This Qualification aims at equipping learners to perform the Accounting function in small organisations and to provide support to Financial Administrators, Accounting Technicians, Accountants and Financial Managers in medium and large organisations so that the Accounting and Financial Management functions can be performed effectively.

The nature of the Qualification and the integrated work-place assessment requirements will reduce the amount of non-productive time traditionally associated with workplace training when learners enter the world of work in the Bookkeeping field.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED TO BE IN PLACE
Learning Assumed to be in Place:

It is assumed that the learner is competent in:

- Communication at NQF Level 2.
- Mathematical Literacy at NQF Level 2.
- Computer Literacy at NQF Level 2.

Recognition of Prior Learning:

This Qualification may be obtained in whole or in part through a process of RPL. The learner will be credited with the Unit Standards already mastered and will not need to prove competence in them again. If competence can be shown in all the Exit Level Outcomes of the Qualification and the Specific Outcomes of the constituent Unit Standards, the complete Qualification can be awarded to the candidate.

The assessor applying RPL could use any of the following tools and techniques to assess competence:

- Performance of an accounting task in the workplace.
- Questioning the learner about the task.
- Written evidence that the learner is able to undertake the task in terms of previous work experience.
- Simulation of an accounting task.
- Case studies.
- Preparation of written reports.
- Evidence from workplace appraisal.
- Interpretation of accounting information.
- Evidence of minutes, notes and working papers relating to meetings.
- Verification of completed work.
- Training records.
- Testimonials.
- In-company short courses.
- Certificates and qualifications.

The learner could be required to prepare a portfolio, which will comprise a collection of evidence of prior learning.

Access to the qualification:

Access to the qualification is open, bearing in mind the requirements of "learning to be in place" and that the learner must have access to a work environment where bookkeeping function can be fulfilled.

QUALIFICATION RULES
Fundamental component:

• All Unit Standards in the Fundamental Component, totalling 36 credits are compulsory.

Core component:

• The Unit Standards in the Core Component totalling 57 credits are compulsory.

Elective component:

• Unit Standards totalling 38 credits have been included in this component. The learner is required to select Unit Standards totalling a minimum of 27 credits to complete the qualification.

EXIT LEVEL OUTCOMES
1. Administer credit purchase and credit sales transactions.

2. Apply knowledge of income, receipts, payments and expenses.

3. Administer Value Added Tax (VAT) transactions.

4. Complete reconciliation statements, general ledger accounts and trial balances.

5. Administer petty cash.

6. Apply knowledge and understanding of personal taxation.

7. Apply knowledge of business taxation.

8. Record business financial transactions.

Critical Cross-Field Outcomes:

The learner who acquires this qualification should be able to demonstrate ability to:

• Identify and solve problems by thinking and making responsible decisions.
• Work with others as a member of a team.
• Organise and manage him/herself and his/her activities responsibly and effectively.
• Collect, analyse, organise and critically evaluate performance.
• Communicate well using mathematical and language skills.
• Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving situations do not exist in isolation.
• Benefit by full personal development, thus contributing to the social and economic development of South African society at large.

ASSOCIATED ASSESSMENT CRITERIA
1.
• Source documents are identified and used in compliance with organisational and legislative requirements.
• Credit Purchase Transactions and Credit Sales Transactions are recorded in the appropriate journals.
• Credit-related transactions are recorded in the General Journal.
• Creditors' and debtors' accounts are maintained according to organisational procedures and requirements.

2.
- Source documents are identified for the relevant functions.
- Income, receipts, payments and expenses are recorded in the relevant books of account.
- Credit Sales Transactions and Routine Income Transactions are recorded in the appropriate journals.
- Other credit-related transactions, as well as non-routine related income transactions are recorded in the General Journal.
- Receipts are received and recorded according to general bookkeeping practice.
- Payments are recorded according to legislative and organisational requirements.

3.
- VAT concepts are understood and defined using accepted business terminology.
- The current rules and rates of VAT are applied in accordance with legislation.
- VAT for cash and credit transactions is calculated and recorded according to legislative requirements.
- VAT records are set up and maintained following the relevant legislative policies and procedures.
- VAT returns are completed in accordance with legislative regulations.
- Relevant documentation for the Receiver of Revenue is compiled according to legislative requirements.

4.
- Receipts and payments are compared to bank statements according to organisational procedures.
- Bank reconciliation statements are compiled in accordance with organisational requirements.
- A basic Debtors and Creditors Reconciliation Statement is prepared according to organisational and legislative policies and procedures.
- General ledger accounts are prepared following relevant organisational and legislative requirements.
- Ledger balances and control accounts are prepared according to organisational requirements.
- Initial trial balances are drafted relevant to the organisational policies and procedures.

5.
- Money for Petty Cash transactions is disbursed according to internal regulations.
- Petty Cash transactions are recorded in accordance with organisational requirements.
- Imprest amount is restored according to organisational requirements.

6.
- Gross wages and salaries from time records or a productivity scheme are calculated.
- Making and recording the correct deductions calculate net wages and salaries.
- Payslips, PAYE documents and other forms, showing Income Tax deductions are completed.
- Money for wages is disbursed according to organisational requirements.
- IRP 5 forms and documentation for the Receiver of Revenue are completed according to legislative requirements.

7.
- The main business expenses, not allowable for income tax purposes are distinguished from expenses that are tax allowed.
- Capital allowances are understood and calculated according to relevant legislation.
- The figures required for the completion of an income tax return are calculated according to relevant legislation.
- The tax payable by an individual who is a sole trader is calculated according to relevant legislation.
- Tax payable by a small business is calculated according to legislative requirements.
- The concepts of limited liability and incorporation is understood and applied in accordance with legislative requirements.

8.

- Receipts and Payments are processed according to organisational procedures.
- Records are entered in an analysed cashbook for both cash and bank entries.
- Check invoices are received against orders according to organisational procedures.
- Quotations and invoices are produced in accordance with organisational requirements.
- Debtors and creditors are recorded according to organisational procedures.
- Suppliers' statements are reconciled in accordance with organisational requirements.
- Bank reconciliation statement is prepared according to legislative and organisational requirement.

Integrated Assessment:

Integration implies that theoretical and practical components are assessed together. It also implies that learning in different unit standards could and should be assessed in a integrated way where possible. Integrative assessment techniques may be used to assess multiple specific outcomes within multiple unit standards within the learner's work context. Within each unit standard, the specific outcomes and associated assessment criteria guide the learning process. The assessment determines whether the outcomes have been attained.

Assessments should be flexible and must cater for a wide range of options and contexts. Assessment must be fair, transparent, valid and reliable and should ensure that no learner is disadvantaged.

Assessment of Communication and Mathematical Literacy should be contextually based in accordance with the specialisation and context chosen and applied. Assessment has a formative monitoring function. Formative assessment should be used to assess gaps in the learner's skill and knowledge level. Its goal is to assess the learner's competence providing feedback to both learner and facilitator for further learning. It is continuous and is used to plan appropriate learning experiences to meet the learner's needs. It provides information about problems experienced at different stages in the learning process.

Assessment must also have a summative component. Summative assessment may be used on completion of a unit standard, but should not be the only form of assessment.

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. Where it is not possible to assess all competencies in the workplace, simulations, case studies and other techniques should be used to provide a context appropriate to the assessment.

INTERNATIONAL COMPARABILITY
International benchmarking took place throughout the project in:

- The standards writing approach.
- The contents of the standards themselves.

Benchmarking was done on qualifications from Britain, Mozambique, Malawi, Bahamas, Namibia and New Zealand. In terms of the Australian and New Zealand approach to qualifications the unit standards were either non-existent or hard to find.

Reviewing the Namibian Qualifications Authority (NQA) website and meeting with representatives from the NQA highlighted a need to develop supporting qualifications for the Accounting Sector, which is lacking in Namibia at present.

This qualification is directly comparable to the Level 2 Certificate in Bookkeeping (100/2870/5) registered with the Qualifications Curriculum Authority and awarded by the International Association of Bookkeepers (IAB). In addition to this qualification being offered in the United Kingdom, it is also offered in Russia, Estonia, Latvia, Lithuania, Kazakhstan, Ukraine and Sri

Lanka. The accounting outcomes of this qualification fairly represent the outcomes of the qualification "Certified Professional Bookkeeping" offered by Galilee College, which is registered with the Bahamas Ministry of Education and approved by the Bahamas Department of Public Personnel.

In Britain there is a qualification which closely matches the outcomes in the Level 3 Certificate in Bookkeeping (100/2872/9) and the Level 3 Diploma in Accounting and Advanced Bookkeeping (100/2873/0) registered with the Qualifications Curriculum Authority and awarded by the International Association of Bookkeepers (IAB). In addition this qualification is being offered in the following countries: Russia, Estonia, Latvia, Lithuania, Kazakhstan, Ukraine and Sri Lanka.

A review of qualifications in Bookkeeping offered in the Bahamas showed that the accounting outcomes of this qualification fairly represent the outcomes of the qualification "Certified Professional Bookkeeping" offered by Galilee College which is registered with the Bahamas Ministry of Education and approved by the Bahamas Department of Public Personnel.

ARTICULATION OPTIONS
This Qualification articulates horizontally with the following Qualifications:

• ID 23655: National Certificate: Business Administration Services, NQF Level 3.

The Qualification articulates vertically with the following Qualifications:

• ID 58376: FETC Bookkeeping, NQF Level 4.
• ID 48736: National Certificate: Small Business Financial Management, NQF Level 4.
• ID 23953: FETC: New Venture Creation, NQF Level 4.

Learners will be able to apply for Certificate membership of the Institute of Certified Bookkeepers Ltd, the largest professional body in the world offering Qualifications at NQF Levels 3, 4 and 5.

MODERATION OPTIONS
• Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with a relevant ETQA or 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 or by an ETQA that has a Memorandum of Understanding with 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.

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

CRITERIA FOR THE REGISTRATION OF ASSESSORS
Anyone performing assessment to determine competence for this Qualification should:

• Hold a qualification in Bookkeeping that is registered at NQF 4 or above.

- Be registered as an assessor with the relevant ETQA.
- Be employed or have previous experience in the accounting field.

NOTES
N/A

UNIT STANDARDS

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Core	117423	Administer credit purchase transactions	Level 3	3
Core	117422	Administer credit sales transactions	Level 3	3
Core	117419	Administer income and receipts	Level 3	4
Core	117420	Administer payments and expenses	Level 3	4
Core	117424	Calculate and record value added tax transactions	Level 3	5
Core	117421	Demonstrate basic accounting concepts	Level 3	12
Core	117425	Compile reconciliation statements	Level 3	6
Core	117427	Prepare general ledger accounts and initial trial balance	Level 3	5
Core	117418	Understand the Petty Cash system	Level 3	3
Core	114735	Perform Value Added Tax calculations and complete returns	Level 4	5
Core	114733	Complete PAYE documents	Level 4	7
Elective	117426	Prepare salaries	Level 3	9
Elective	117417	Prepare Wages	Level 3	6
Elective	114742	Calculate tax payable by a small business	Level 4	6
Elective	114736	Record business financial transactions	Level 4	5
Elective	116940	Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem	Level 3	6
Elective	117927	Use a Graphical User Interface (GUI)-based database application to solve a given problem	Level 4	6
Fundamental	119472	Accommodate audience and context needs in oral/signed communication	Level 3	5
Fundamental	119457	Interpret and use information from texts	Level 3	5
Fundamental	119465	Write/present/sign texts for a range of communicative contexts	Level 3	5
Fundamental	9012	Investigate life and work related problems using data and probabilities	Level 3	5
Fundamental	7456	Use mathematics to investigate and monitor the financial aspects of personal, business and national issues	Level 3	5
Fundamental	9013	Describe, apply, analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts	Level 3	4
Fundamental	119467	Use language and communication in occupational learning programmes	Level 3	5
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