



**education**

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Department:  
Education  
**REPUBLIC OF SOUTH AFRICA**

**National  
Curriculum Statement  
Assessment Guidelines**

**for**

**General Education and Training  
(Intermediate and Senior Phases)**

**Economic and Management  
Sciences**

## PREAMBLE

The Assessment Guidelines are part of a developmental process that is aimed at increasing the capacity of the education system, teachers, school management teams and departmental officials to enhance the effective implementation of the *National Curriculum Statements and the National Policy on Assessment and Qualifications for Schools in the General Education and Training Band* by developing an authentic assessment system that is congruent with outcomes based education in general and the NCS in particular.

We expect a critical engagement with these documents, as they do not reflect a "zero defect" nor a "one answer" solution and we encourage all who use these documents to alert the Department of Education to any inconsistencies, highly impractical suggestions or any other elements that may detract from the goal of establishing an effective assessment system. We also appeal to you to offer alternative solutions, ideas and suggestions you may have for dealing with issues you may have raised in your input. In particular, examples of good assessment tasks that enhance classroom teaching and learning will be valued.

We encourage you to be as rigorous and as vigorous as you can and have complete faith in your professionalism to expect that your responses, however critical, would be framed in a constructive manner that is geared towards arriving at a shared solution and is not a simplistic listing of problems and concerns.

We look forward to an exciting, growth promoting and stimulating engagement with you all.

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## 1. INTRODUCTION TO THE ECONOMIC AND MANAGEMENT SCIENCES LEARNING AREA

This document gives guidelines for assessment in Economic and Management Sciences (EMS) in the Intermediate and Senior Phases of the National Curriculum Statement (NCS). It gives you – the teachers – information on assessment, as well as ways of implementing assessment in EMS. The assessment guidelines for the Foundation Phase will be in a separate document.

You should read this document in conjunction with the following other documents: the *Economic and Management Sciences Learning Area Statement*; the *National Policy on Assessment and Qualifications for Schools in the General Education and Training Band*; *Teacher's Guide for the Development of Learning Programmes in Economic and Management Sciences*; *White paper 6*, and other current assessment policies.

## 2. ASSESSMENT IN THE NATIONAL CURRICULUM STATEMENT

Assessment in the National Curriculum Statement is not just something you do at the end of the learning process. It is an **integral part of teaching and learning** and you should consider it carefully at all levels of planning.

You can choose a variety of teaching activities to achieve the various assessment standards. Together these will achieve the various learning outcomes. You can also choose a variety of ways to assess the activities you set, depending on what you want to find out from the assessment.

Assessment does not refer simply to activities such as class tests. Assessment is a process. It is the process of discovering information about a learner's performance and then making decisions about the learner's performance and about your teaching methods, based on what you discover. It involves gathering and organising information – which is called the evidence of learning – so that you can review what learners have achieved. This informs our decision taking and helps us to work out whether learners are performing according to their full potential and making progress towards the required levels of performance, as outlined in the Assessment Standards of the NCS.

According to the National Curriculum Statement, assessment in the GET Band should achieve at least one of the following purposes:

- Develop learners' knowledge, skills and values;
- Identify the needs of learners;
- Enable teachers to reflect on their practice;
- Identify learners' strengths and weaknesses;
- Provide additional support to learners;
- Revisit or revise certain sections where learners seem to have difficulties;
- Motivate and encourage learners;
- Provide information or data to a variety of stakeholders; and
- Demonstrate the effectiveness of the curriculum or a teaching strategy

All of the above can be linked to different types of assessment. The following five types are listed in the EMS National Curriculum Statement Grades R–9 (Schools) page 48:

Type of assessment	Description and uses
<b>Baseline Assessment</b>	Baseline assessment asks the question: <b>"What does the learner know?"</b>  Baseline assessment is usually used at the beginning of a phase, grade or learning experience to establish what learners already know. It helps you to plan Learning Programmes and learning activities.
<b>Formative Assessment</b>	Formative assessment asks the question: <b>"How is the learner performing?"</b>  Formative assessment refers to assessment tasks and activities that help you to learn more about how your learners are progressing. Thus it improves teaching and learning by giving you direction and helping you to adapt to learners' needs. Formative assessment, or 'assessment for learning' involves both you and the learner in a process of continual reflection and self-assessment. Formative assessment is interactive in that you use thought provoking questions to stimulate learner thinking and discussion.
<b>Summative Assessment</b>	Summative assessment asks the question: <b>"How has the learner performed?"</b>  Summative assessment gives an overall picture of learners' progress at a given time, e.g., at the end of a term. It is usually used to make judgments about learner performance, progress and promotion. For this reason it can involve high stakes for learners, e.g., getting a Senior Certificate.
<b>Diagnostic Assessment</b>	Diagnostic assessment asks the question: <b>"Are there any problems that are preventing the learner from performing?"</b>  Diagnostic assessment is similar to formative assessment. However, it will always lead to some form of remedial action or programme. It shows up learners' strengths and weaknesses or inappropriate teaching methodology. When it is used to find out about the nature and cause of medical barriers to learning it should be administered by specialists and followed by expert guidance, support and intervention strategies.
<b>Systemic Assessment</b>	Systemic assessment asks the question: <b>"How effective is the education system?"</b>  Systemic assessment is an external way of monitoring the education system by comparing learners' performance to national indicators of learner achievement. It involves monitoring of learner attainment at regular intervals, using nationally or provincially defined measuring instruments. This form of evaluation compares and aggregates information about learner achievements so that it can be used to assist in curriculum development and in evaluating teaching and learning. For the General Education and Training Band, Systemic Evaluation will be conducted at the phase exit levels, i.e., Grade 3, Grade 6 and Grade 9.

### 3. THE NATURE OF ASSESSMENT IN THE ECONOMIC AND MANAGEMENT SCIENCES LEARNING AREA

Assessment in EMS should always be seen as integral to teaching and learning. It should reflect the Learning Area as a whole. It should focus on applying the body of knowledge, skills and values (as stipulated in the Assessment Standards) acquired through learning and teaching.

#### 3.1 Economic and Management Sciences at a Glance

EMS can be broken into the following, very broad categories of learning:

- Economic Literacy;
- Financial Literacy;
- Consumer Literacy;

- Entrepreneurial knowledge and skills;
- Managerial knowledge and skills; and
- Leadership knowledge and skills

### **3.2 Economic and Management Sciences Learning Outcomes**

Learning Outcome 1 (The economic cycle) and Learning Outcome 2 (Sustainable growth and development) deal with economic matters. That is, they explore past and recent economic history, different role players in the economy and ethics and the economy. Learning Outcome 3 (Managerial, consumer and financial knowledge and skills) and Learning Outcome 4 (Entrepreneurial knowledge and skills) deal more directly with business and entrepreneurship.

### **3.3 Knowledge and Skills included in the Economic and Management Sciences Learning Outcomes**

The knowledge and skill areas that are covered in the EMS Learning Outcomes are listed below.

- The role players in the economy – their roles, rights and responsibilities – and how the economy functions;
- Economic growth and development and how to sustain it;
- Productivity knowledge, values and attitude and its effect on economic prosperity, growth and living standards;
- Leadership and management issues within EMS include:
  - ▶ Basic aspects of leadership, such as planning and directing;
  - ▶ Negotiation, motivation, delegation and conflict management;
  - ▶ Basic aspects of management such as administration, finance and production;
  - ▶ Marketing, purchasing, public relations and human resource development; and
  - ▶ Rights and responsibilities of management and workers,
- Financial and consumer knowledge in EMS includes:
  - ▶ Accounting;
  - ▶ Personal finance;
  - ▶ Consumer knowledge and skills; and
  - ▶ Importance of savings and investments.
- Entrepreneurial skills, knowledge and attitudes included in EMS include:
  - ▶ Taking initiative;
  - ▶ Risk taking within the context of the process of:
  - ▶ Conceptualising a business;
  - ▶ Starting a business;
  - ▶ Financing a business; and
  - ▶ Running a business.
- Responsibilities of entrepreneurs within communities and business environments.

### **3.4 Weighting of the Learning Outcomes**

The suggested weighting (time allocation) per Learning Outcome below is based on the actual time it would take to teach, learn and assess the appropriate knowledge, skills and values relating to the Learning Outcome in each phase.

The following weightings are suggested for the Intermediate and Senior Phases.

Learning Outcomes	Intermediate Phase	Senior Phase
LO 1 The economic cycle	20%	20%
LO 2 Sustainable growth and development	20%	15%
LO 3 Managerial, consumer and financial knowledge and skills	20%	30%
LO 4 Entrepreneurial knowledge and skills	40%	35%

More emphasis has been placed on LO 4 in the Intermediate Phase, as it forms the basis for developing important skills needed for personal development that is related to creating jobs, wealth and alleviating poverty and unemployment in South Africa. LO 4 will play a major role in inculcating entrepreneurial attitudes, values and spirit in learners from the early years of their schooling.

More emphasis has been placed on Learning Outcome 3 and 4 in the Senior Phase, as they prepare learners to a great extent for the FET Phase and the world of work. LO 4 also offers many integration opportunities with the other EMS Learning Outcomes and Learning Outcomes of other Learning Areas. These two Learning Outcomes are interrelated, as they both address business. The activities of one Learning Outcome can have an impact on the other. Interconnectedness of the LOs is holistically dealt with in the teaching and learning of EMS.

Assessment in EMS focuses on the knowledge, skills and values necessary for informed, ethical, productive and responsible participation in the economy.

### 3.5 Implications of Weighting for Assessment in Economic and Management Sciences

Weighting in EMS shows the balance that you should maintain between the Learning Outcomes. It does not mean that one outcome is more important than another. Nor does it mean that some Learning Outcomes should be ignored. You must assess all the Learning Outcomes and the learners must achieve the minimum standards in each of them.

### 3.6 Implications of Integration of Assessment Standards in Economic and Management Sciences

In EMS, you are encouraged, where possible, to integrate Assessment Standards. Assessment Standards can be treated as units, as suggested in the Teachers' Guide, or you can design units that suit their context (pp. 32–34). You can integrate Assessment Standards from other Learning Outcomes in EMS with your units if they have a natural link to enhance learning and teaching. You can also integrate Assessment Standards from other Learning Areas with your units if there is a natural link. However, you should only **formally** assess and record Assessment Standards from EMS Learning Outcomes. You must also ensure that all Learning Outcomes of EMS will, at least once, be used as the main Learning Outcome in a lesson for learning, teaching and assessment. If you assess Assessment Standards as a unit or group in a task, it is possible to cover all of them in formal assessment.



## 4. CONTINUOUS ASSESSMENT IN THE ECONOMIC AND MANAGEMENT SCIENCES LEARNING AREA

Continuous assessment (CASS) in Economic and Management Sciences is school-based. As EMS teachers, you must manage and design your CASS programmes guided by the National Curriculum Statement Grades R to 9, as well as these national assessment guidelines. Continuous assessment implies that you should undertake assessment activities intermittently during the year, using a variety of forms of assessment. Each form of assessment you use is a different strategy for collecting the evidence of learning. This will ensure a fair and representative sampling of the Learning Outcomes and Assessment Standards covered in EMS.

The purpose of assessment in the National Curriculum Statement is to gather information about the learner's development. Since assessment is integral to teaching and learning, and since you depend on assessment to improve your practice, assessment must be continuous. Learning is also a continuous process and learners learn in different ways and at different paces. You can get a good picture of the learner's development if the learning process is assessed on an ongoing basis, both informally and formally. It is important for learners, their parents, and for you, as teachers, to find out how learning is progressing in the eight Learning Areas in terms of learners' development of skills, knowledge and values.

### 4.1 The Characteristics of Continuous Assessment

The characteristics of CASS can be found on page 49 of the Economic and Management Sciences Learning Area Statement (NCS Policy: 2002). It covers all the outcomes-based education assessment principles and ensures that assessment:

- takes place over a period of time and that it is ongoing;
- supports the growth and development of the learners;
- provides feedback from learning and teaching;
- uses strategies to cater for a variety of learner needs (language, physical, psychological, emotional, and cultural); and
- allows for summative assessment.

CASS is made up of two different, but related activities: informal daily assessment and a formal 'Programme of Assessment for Economic and Management Sciences'. Although you will use both formal and informal assessment in CASS, you will record only formal tasks or activities for progression and promotion. You will use informal assessment for formative purposes. It will form part of your daily planning and it will assist you in making professional judgements on learner performance.

### 4.2 Informal Daily Assessment

You must monitor learner progress during daily learning activities. You can do this through any of the following methods:

- Formative question and answer sessions. That is, after a learning experience, you could ask questions in such a way that would require your learners to show you what they have learned. This will help you to decide what to teach and how to teach it.
- Formative reflection. This involves getting your learners to reflect on what they have learned and how they have learned it. You can do this through one-on-one or group discussions, or through written or oral reports. Any method is acceptable, as long as it helps you and the learner to realise how they are performing.

- Observations. You should continually observe learners in all of their learning activities. This will give you a lot of valuable information on how they are performing.
- Short assessment tasks completed during the lesson by individuals, pairs or groups.
- General class work.
- General homework.

You should include these kinds of informal assessment tasks and activities in your lesson planning.

Again, you do not need to record the results of informal daily assessment tasks unless you wish to do so. (If you wish to record such results, you could use a simple checklist.) However, you may use learners' performance in these assessment tasks to give verbal or written feedback to learners, the School Management Team, parents and other stakeholders. This is particularly important if you encounter barriers to learning or poor levels of participation. And even though these results are not formally recorded for promotion purposes, you may consider them when you have to make a professional judgement about a learner's progress.

It is important for learners to learn from and reflect on their own performance. You can ensure that this happens by including self-assessment, peer assessment and group assessment in your lesson planning.

#### **4.2.1 How to implement informal assessment**

Informal assessment allows you to explore the levels of learning taking place in your classroom. For this reason it is neither unstructured, nor unplanned. You can learn a lot about how your learners are performing if you take the time to prepare your informal assessment tasks.

Questioning is one of the most common ways to assess informally. Open-ended questions lead to further questions, both from the learners to the teacher and from learners to other learners. The process results in learners and teachers:

- ▶ thinking more deeply about their own thinking and knowledge
- ▶ realising their strengths and weaknesses in their skills and knowledge;
- ▶ having dialogue and collective reflection; and
- ▶ improved self-expression.

By observing learners, you can gather important information from informal assessment. You can observe how they do their tasks and what they are struggling with. You can observe how they work together and to what extent this helps them to learn. You can also observe how you could change the tasks to maximise learning.

Informal assessment allows you to unlock and develop learners' potential in all the skills, knowledge, values and attitudes that make up EMS. It can also help you to focus on different areas for different learners. Some may need more help in one aspect of EMS than in another. Some may want greater challenges. Informal assessment allows you the flexibility to assist learners who need help. It also allows you to nurture the interest of those who are keen. And it gives you the chance to nurture a positive attitude to the Learning Area as a whole.

### 4.3 Planning Formal Assessment

Formal assessment gives you a systematic way of evaluating how well learners are progressing in a grade in EMS. Formal assessment should be recorded. Formal assessment tasks may focus on integrating Learning Outcomes and Assessment Standards. But, for enrichment or reinforcement purposes, they could be focused on a particular Learning Outcome and its Assessment Standard(s).

#### **Formal assessment tasks**

An assessment task is described as 'an assessment activity or activities that is/are designed to assess a range of skills and competencies'.

When you develop an assessment task for EMS, you will make use of more than two forms of assessment, with possibly a number of activities supporting each form. Each task should consist of more than two activities. For example, as a performance-based task, you may create a research project. This could include a questionnaire, interviews and a written report. Groups or individuals could do a number of activities that contribute to the design of the questionnaire and the preparation of the final report. It is recommended that in addition to the other forms of assessment, every term a test must be given on all Assessment Standards covered to date.

Over the year the assessment tasks in a Learning Area must reflect varied forms of assessment and assess a variety of skills (informed by the Assessment Standards in that grade). Together, all the assessment tasks must engage with all the LOs & ASs for the grade.

Assessment tasks range from being fairly short in time and content, taking a short time to complete, to being much longer and involving a number of activities that take longer to complete. These tasks should be appropriate to the Assessment Standards. It is also most important that they are appropriate for the age and grade of the learners you are assessing. You will use the results from the assessment of these tasks for formal recording of the learners' progress.

Assessment tasks give learners the chance to demonstrate their acquired competencies in EMS. Throughout the year, the assessment tasks should help you to make informed judgements about learners' performance and competence in EMS.

The Learning Outcomes of EMS can help learners to decide on their subject choice in the Further Education and Training (FET) band. You may encourage a learner to take Economics as a subject in FET if he or she does well in Learning Outcomes 1 and 2. You may suggest taking Accounting to a learner who performs well in LO 3. And you may suggest taking Business Studies to a learner who is good in LO 4. You may even encourage a learner to take all of these subjects if they want to follow the BCM field.

However, there is something more important in EMS than preparing learners for their subject choice in the FET band. EMS is a Learning Area that helps to prepare learners for life in the real world. As an EMS teacher you are able to infuse your teaching with values that are far more important to a learner than being able to explain principles of economics or to complete a balance sheet. As an EMS teacher you are able to reinforce the entrepreneurial skills, knowledge and values that will resonate throughout learners' lives and help to make them powerful players in the economy. Some of these entrepreneurial skills and values are listed below:

1. Innovation, lateral thinking, creativity and vision.
2. Self-reliance, independence and resourcefulness.
3. The ability to differentiate patterns or trends in seemingly meaningless data and details.
4. The ability to integrate ideas from completely separate contexts.
5. The ability to organise a team or build up a network and use it productively – and a love and respect for ability in others.
6. The ability to be decisive, to take action and to take risks.
7. A passion for work, excellence, perfection and professionalism.

If you can construct your assessment tasks to bring out these skills and values in your learners, then you will have given them tools that they can use for life.

#### **4.3.1 Planning for assessment at Learning Programme level**

Planning for assessment happens at all three levels of planning. That is, at the levels of the Learning Programme, the Work Schedule and the Lesson Plan.

When planning for assessment at the Learning Programme level, you should consider the overall knowledge and skills that you expect a learner in that phase to acquire. The Learning Outcomes and Assessment Standards in EMS clearly spell out what learners should know and do. The three or four formal assessment tasks will have to reflect the knowledge, skills and values to be assessed in all grades. In EMS the tasks will have to reflect all of the following:

- ▶ How the economy functions and the role players that are involved;
- ▶ Economic growth and development and how it can be sustained;
- ▶ Consumer skills;
- ▶ Financial literacy;
- ▶ Managerial and leadership knowledge and skills; and
- ▶ Entrepreneurial knowledge and skills.

In EMS Learning Programmes, the following forms of assessment are preferred, although they are not the only ones that you can use:

- ▶ Projects;
- ▶ Tests;
- ▶ Data response;
- ▶ Graph analysis;
- ▶ Structured questions;
- ▶ Examinations
- ▶ Simulations;
- ▶ Presentations (oral and written);
- ▶ Case studies;
- ▶ Demonstrations;
- ▶ Interviews;
- ▶ Questionnaires;
- ▶ Assignments;
- ▶ Posters; and
- ▶ Surveys.

The Learning Programme should also:

- ▶ List the key resources that learners are likely to need, particularly if the resources are limited and need to be shared;
- ▶ Consider the context in which the learning takes place; and
- ▶ Indicate the time that will be needed for appropriate and authentic assessment. You should ensure that tasks are fairly distributed so as not to overburden learners.

#### 4.3.2 Planning for assessment at Work Schedule level

When EMS teachers of a particular grade meet to plan their work schedules they need to plan the formal assessment tasks that the learners will do for the year as part of the work schedule. This plan is called the Assessment Programme. The number of formal assessment tasks is prescribed per grade and per Learning Area in the *National Policy on Assessment and Qualification for Schools in the General Education and Training Band*. The following three tables are reproduced here from the Policy. They show the number of formal assessment tasks that are prescribed per grade and per Learning Area.

Number of formal recorded assessment tasks for Grades 4–6					
Learning Area	Term 1	Term 2	Term 3	Term 4	Total
Language 1	2	2	2	2	8
Language 2	2	2	2	2	8
Language 3 ( <i>optional</i> )	1	1	1	1	4
Mathematics	2	2	2	2	8
Natural Sciences	1	2	1	2	6
Social Sciences	1	2	1	2	6
Technology	1	1	1	1	4
Economic and Management Sciences	1	1	1	1	4
Life Orientation	1	1	1	1	4
Arts and Culture	1	1	1	1	4

Number of formal recorded assessment tasks for Grades 7–8					
Learning Area	Term 1	Term 2	Term 3	Term 4	Total
Language 1	3	2	3	2	10
Language 2	2	2	2	2	8
Language 3 ( <i>optional</i> )	2	1	2	1	6
Mathematics	3	3	3	3	12
Natural Sciences	2	2	2	2	8
Social Sciences	2	2	2	2	8
Technology	1	1	1	1	4
Economic and Management Sciences	1	1	1	1	4
Life Orientation	1	1	1	1	4
Arts and Culture	1	1	1	1	4

Number of formal recorded assessment tasks for Grade 9					
Learning Area	Term 1	Term 2	Term 3	Term 4	Total
Language 1	3	2	3	C	8
Language 2	2	2	2		6
Language 3 ( <i>optional</i> )	2	1	2		5
Mathematics	3	3	3	T	9
Natural Sciences	2	2	2		6
Social Sciences	2	2	2		6
Technology	1	1	1	A	3
Economic and Management Sciences	1	1	1		3
Life Orientation	1	1	1		3
Arts and Culture	1	1	1		3

When you plan assessment at this level, you should consider the following six questions:

1. What is the purpose of assessment in the task?
2. Which Learning Outcomes and Assessment Standards will I be assessing with these activities?
3. Which task(s) will I do in my class?
4. What will be the focus of the assessment task?
5. Which forms of assessment will suit the content?
6. When will the assessment task be done and how long will it take?

Let's take a closer look at all the above questions.

**1. What is the purpose of assessment in the task?**

You will always want to find out how learners are progressing and how you can assist them to improve learning. For this reason all assessment is, to some extent, always formative. But you will design the formal assessment tasks for summative purposes, so that you can report to parents, the school administration, as well as to the learner on his or her progress.

**2. Which Learning Outcomes and Assessment Standards will I be assessing with these activities?**

The NCS policy document states that you must actively pursue all Learning Outcomes and Assessment Standards. That is, by the end of the year you should have taught towards all Learning Outcomes and you should have addressed all Assessment Standards. For this reason, you should assess all Assessment Standards where possible. To ensure you do this efficiently, we suggest that if you cover an Assessment Standard in a term, you should also cover it in formal assessment. You could do this in a test or exam in addition to the other forms of assessment.

**3. Which task(s) will I do in my class?**

The Assessment Programme for EMS, which is part of the Work Schedule, should have four formal assessment tasks in one year for Grades 4-8 and three formal tasks in one year for Grade 9. When conceptualising the EMS assessment tasks for the year, you should consider the full scope of content (skills, knowledge and values), the Learning Outcomes with Assessment Standards and the different forms of assessment.

**4. What will be the focus of the assessment task?**

Examine all the Learning Outcomes and the Assessment Standards of EMS and spread them over the three or four assessment tasks that you need to create. Again, we recommended that, if possible, you should formally assess and record all Assessment Standards. You must decide on what knowledge, skills and values you will focus, as you identified at the Learning Programme planning level, e.g., role players in the economy, sustainable growth and development, entrepreneurship, etc. It becomes easier when a task covers a number of Assessment Standards and uses various forms of assessment. The assessment tasks over the year should reflect the full scope of the EMS Learning

Area, capturing learner competence in the core essence of EMS. You should also consider the contexts of the school, the learners and the specific grade you're developing for when you are choosing your focus.

EMS is a practical Learning Area that equips learners with real life skills for personal development and the development of the community. The tasks you create should contribute to personal development and they should promote the idea of sustainable economic growth and the development of the community.

#### **5. Which forms of assessment will suit the content?**

You should use varied forms of assessment across the four assessment tasks for the year. Ensure that the forms you choose suit the task and learners' context. The verbs used in the Assessment Standards usually determine the form of assessment you should choose.

When you choose a form of assessment, please consider:

- ▶ That you have to use three to five different forms and they should come from the list identified at the Learning Programme planning level.
- ▶ What it is that you want to assess. The form of assessment that you choose should suit the knowledge, skills and values to be assessed.

#### **6. When will the assessment task be done and how long will it take?**

You should discuss with your colleagues when the different tasks should be done. You should consider the load on the learners, so tasks from different Learning Programmes should not take place at the same time, but should be spread over the year. Also consider the resource needs of a task when scheduling. For example, you may want to schedule a task around the National Budget presentation by the Minister of Finance. Or you may want to link tasks to other significant or special days and events. You should also allow time for research, if necessary – perhaps during holidays or long weekends – so that all learners can go to a library or interview people, or whatever the task requires. You should also consider the NCS requirements for time spent in EMS. Alternatively, you could hand out an assessment plan to the learners at the beginning of the year, just like the Higher Education Institutions (HEIs) do, and you could remind learners when the time is due for assessment tasks. This will give learners enough time to plan their work.



Example – Economic and Management Sciences – Annual Assessment Programme in the Intermediate Phase, Grade 5					
	LOs and ASs	Assessment task	Focus	Forms of assessment	Context
<b>Term 1</b> <b>Task 1</b>	<b>Grade 5 LO 3:</b> <i>Managerial, consumer and financial knowledge and skills</i> Assessment Standards: <ul style="list-style-type: none"> <li>Find out and discusses how a savings account is opened at a bank, and complete deposit and withdrawal slips</li> <li>Discusses the value of savings and thrift, and people's difficulty in saving if basic needs are not met</li> </ul>	Consumer skills	Savings, thrift and the practical use of a savings account at different savings institutions	Discussion Project Written presentation Test (all Assessment Standards covered to date)	Savings and banking
<b>Term 2</b> <b>Task 2</b>	<b>Grade 5 LO 4:</b> <i>The economic cycle</i> Assessment Standard: <ul style="list-style-type: none"> <li>The learner generates entrepreneurial actions to meet own community needs (e.g., co-operatives, loan societies).</li> </ul>	Entrepreneurial knowledge and skills	Learners learn to take entrepreneurial action to meet their own community needs.	Entrepreneurial plan Project Report Test (all Assessment Standards to date)	Learners identify needs in their community and create plans to respond to those needs.
<b>Term 3</b> <b>Task 3</b>					
<b>Term 4</b> <b>Task 4</b>					

### **4.3.3 Planning for assessment at Lesson Plan level**

When you are planning at Lesson Plan level, you must integrate assessment into your teaching and learning plan. You plan your formal assessment tasks at Lesson Plan level. To do so, you should follow these steps:

1. Develop the assessment task.
2. Gather the evidence.
3. Evaluate the evidence on learner performance.
4. Record learner performance.
5. Report on learner performance.
6. Reflect on the learning process.

#### ***4.3.3.1 Develop the assessment task***

Please read this in conjunction with the example that begins on page 18.

When you plan the formal assessment tasks for your class, you should start with the activity as stated in the Assessment Programme (from your planning at Work Schedule Level). When you develop individual tasks for formal, recorded assessment, you could use the following guidelines to help you structure them:

- ❖ Unpack the selected EMS Assessment Standards. That is, start by choosing what Assessment Standard or standards you wish to assess. Most of the information you need is contained in the Assessment Standards. They will indicate the knowledge, skills and values that you must assess. Once you have made your choice, make a list of all the associations that you can make with the standard(s). That is, list all the knowledge, skills and values that relate to the standard(s). Once you have done this, you should make a list of all the things you think your learners would associate with the standard(s). There will almost certainly be a difference between the two lists. It is up to you to make links between these two contexts. When you do so, remember to create your task around a context that will appeal to your learners. If they are interested in the context, the chances are that they will perform much better than if they find the task boring.
- ❖ After unpacking the Assessment Standards, decide on the most appropriate form of assessment. In the example on page 18, the forms suggested are a written presentation in the form of a worksheet and a project. The project would also consist of other forms, such as interviews, business documents, e.g., deposit and withdrawal slips, as well as plans, e.g., a money generation plan and a savings plan.
- ❖ Develop the teaching and learning activities that make up the assessment task. Make sure that you give clear guidelines to the learners of what they are required to do. List the resources needed for all activities. The assessment task should:
  - Be appropriate to the age of the learners,

- Consider what barriers to learning exist and how can they be optimised; and
- Consider which resources are available to learners and teachers.

The task in the example is divided into three activities: a discussion (for informal assessment purposes only), a written presentation in the form of a worksheet and a project. A test is recommended to cover all Assessment Standards addressed in this term.

Study all the different activities that make up the assessment task, and ask the following questions about each activity:

- ❖ Who assesses this activity? Is it peer-assessed, self-assessed, or teacher-assessed? Peer assessment and self-assessment should preferably only be applied in informal assessment. The teacher should assess during both informal and formal assessment.
- ❖ What is my role as the teacher in this activity? What is the role of the learners in this activity?
- ❖ What form of assessment is being used? (The form of assessment should be noted at this level as it is decided at work schedule level.)
- ❖ What type of evidence is collected? (For example: there is a discussion from the first activity, there is a written presentation for the second activity; there is a project for the third activity).
- ❖ What scoring procedure or criteria will be the most appropriate to evaluating the final product? For example, should you give the learners a rubric (where applicable) for discussion? The Assessment Standards are your most obvious sources for criteria to evaluate assessment tasks. They are the source and the focus of your content.
- ❖ What are the various contexts in which this task will be completed? (This will also already have been noted at the Work Schedule level.) That is, what barriers to learning are present? How enthusiastic and committed are the learners in the class? Where is the school situated, and what resources are accessible to learners and to you as the teacher? The more questions you ask about the issues surrounding the assessment of a task, the more accurate your assessment is likely to be.

**Note:** This planning will highlight your various roles as the teacher throughout the assessment task. You should make a list of these roles and describe your function at each stage. This should go into your teacher portfolio, as it provides important details on the task.

#### 4.3.3.2 *Gather the evidence*

You should ask the following questions about the evidence you are going to collect:

- ❖ How will I gather the evidence in a fair, reliable manner?
- ❖ Are the tools I am using to gather evidence, e.g., rubrics or memoranda, appropriate to the skills, knowledge and values being assessed?
- ❖ How much assistance will learners need?

- ❖ Will they work in pairs or groups? How will I monitor individuals?
- ❖ Who will assess? Will they assess each other in certain sections, such as their own level of cooperation in groups? Will I assess other sections, such as those involving factual correctness and effort?

#### 4.3.3.3 Evaluate evidence on learner performance

You should ask yourself the following questions about evaluating the evidence on learner performance:

- ❖ Does the evidence accurately reflect the competence of the learner in achieving the EMS outcomes, i.e., the Learning Outcomes and Assessment Standards on which the assessment task is based? Does what I know from the classroom or elsewhere agree with the evidence I have collected?
- ❖ Are there any side issues, such as presentation or language, that have crept into the task that are obscuring evidence about the learner's competence?

An example of levels used in a rubric to assess the Assessment Task	
Level	Level descriptor
1 (Not achieved)	Incorrect response or no response
2 (Partly Achieved)	Incomplete response
3 (Achieved)	Gave the expected response
4 (Outstanding)	Gave the expected response and presented supportive information

Table illustrating the link between marks and levels of performance		
Levels of performance	Marks (%)	Description
1	1–34%	Not achieved
2	35–49%	Partially achieved
3	50–69%	Achieved
4	70–100%	Outstanding/Excellent

#### 4.3.3.4 Record learner performance

You must record the learner's performance in the assessment task and comment on the knowledge, skills and values embedded in the Assessment Standards. You will only report on the Assessment Standards used in formal assessment tasks. You must record each learner's performance as a mark and/or code for the assessment task, along with an indication of the Learning Outcomes being addressed. You may write comments for support purposes when and where appropriate.

Using all the available evidence (as depicted in the example above), as well as your observations as a teacher, you will make a professional judgement about a learner's competence in the LOs and ASs assigned for the task.

Your recording sheets must include the following:

- ❖ Names of learners.
- ❖ Dates of assessment tasks.
- ❖ Forms of assessment used.
- ❖ Learning Outcomes and Assessment Standards covered in the task.
- ❖ Learner achievement in code or percentage against the assessment task.
- ❖ Support comments, which clarify and expand on the assessment. (Your comments should reflect your opinion of the learner's competence in the Assessment Standards.)

The completed tasks can be kept in any appropriate form. All evidence of learner engagement could be kept as evidence in the teachers' portfolio.

#### **4.3.3.5 Reporting on learner performance**

You are responsible for reporting on learner progress to all relevant stakeholders, i.e., learners, parents, bursary holders and any other interested parties.

You should be prepared to report on:

- ❖ the forms of assessment used;
- ❖ the levels at which learners have achieved the Learning Outcomes;
- ❖ the comments you made on learner achievement for all Learning Outcomes, i.e., comments about where the learner is competent and where there may be room for improvement;
- ❖ the time period on which you are reporting.

#### **4.3.3.6 Reflect on the learning process**

You must reflect on the learning process and follow up with interventions where necessary. If learners are experiencing serious difficulties in achieving the Assessment Standards, you may need to seek additional support with follow-up interventions. You must reflect on how the learners performed and why. Based on what you discover, you should adjust your teaching and assessment accordingly.

Follow-up interventions may include:

- ❖ Creating more opportunities for learning;
- ❖ Giving learners more examples;
- ❖ Building on prior activities; or
- ❖ Giving learners more exercises to achieve certain skills.

Reflect on your practice and consider if the form of assessment and tools you used to gather evidence were appropriate.

You should consider the following questions when reflecting on the learning process:

- ❖ Does the evidence you collected reflect learner competence?
- ❖ Was the form of assessment you used appropriate for the information you wanted to gather?
- ❖ Does your informal assessment correspond with the formal assessment?

#### 4.3.3.7 Example of Planning for Assessment at Lesson Plan level (Intermediate Phase)

<b>Learning Outcome</b> (from teacher assessment plan)	<b>LO 3:</b> Managerial, consumer and financial knowledge and skills <b>LO 4:</b> Entrepreneurial knowledge and skills
<b>Assessment Standards</b> (from teacher assessment plan)	<ul style="list-style-type: none"> <li>■ Finds out and discusses how a savings account is opened at a bank, and complete deposit and withdrawal slips.</li> <li>■ Discusses the value of savings and thrift, and people's difficulty in saving if basic needs are not met.</li> <li>■ Generates entrepreneurial actions to meet own community needs.</li> </ul>
<b>Assessment Form</b> (from teacher assessment plan)	<p>Discussion</p> <p>Written presentation in the form of a worksheet</p> <p>Project</p>
<b>Knowledge, Skills and Values</b> (derived from teacher assessment plan)	<p><b>Knowledge:</b> Thrift (economise, cut down costs); the value of savings; reasons why people may not save money; banks; banking; savings account; deposit slip; withdrawal slip.</p> <p><b>Skills:</b> Opening a savings account; completing a deposit slip; completing a withdrawal slip; entrepreneurial skills (running a business).</p> <p><b>Value:</b> Culture of saving money; attitude to be thrifty; entrepreneurial attitude.</p>
<b>Assessment Task</b>	Discuss how you would generate money and how you would go about saving the money in a bank.
<b>Activities</b> (gathering evidence)	<p><b>Instructions to the teacher</b> The extracts given (see Annexure 5) can be used for this task. Together with the learners, read the extracts given as a resource (extracts from the Financial Services Consumer Education) and engage in discussion prior to the activities or as desired.</p> <p><b>Activity 1: (to be assessed informally)</b> Learners will be asked to discuss the following in groups and take notes:</p> <ul style="list-style-type: none"> <li>■ What is the meaning of savings?</li> <li>■ Why is it necessary for people to save money?</li> <li>■ What is a savings account?</li> <li>■ Why do we have banks?</li> <li>■ What happens in a bank?</li> <li>■ Do all people save money in banks? Discuss what you think the alternatives may be.</li> <li>■ Discuss a few ways in which you as an individual could make some money and save some of it.</li> </ul> <p>You can assess this task informally by observing learners' discussions. You should try to get a feeling for what learners already know about the topic.</p>

<b>Activities (gathering evidence)</b>	<p><b>Activity 2:</b> Complete a worksheet with the following questions:</p> <p><b>Individual Work</b></p> <p><b>Tool for gathering evidence: Memorandum</b></p> <p>Name the banks you know. (3)</p> <p>Discuss reasons why people save their money in banks. (4)</p> <p>Look up the word "thrift" in the dictionary and explain why it is used with respect to using money. (2)</p> <p>If you were a bank manager, how would you encourage everybody, including school children to save their money in your bank? (2)</p> <p><i>After the learners have completed these worksheets, you will collect them and mark them.</i></p> <p><b>Activity 3: Individual work</b></p> <p><b>Tool for gathering evidence: Rubric</b></p> <p>Do the following project on generating money and saving it in a bank. Write the project in your EMS answer book.</p> <p><b>Instructions to the teacher</b></p> <p>Prior to this activity, collect deposit slips, withdrawal slips and other information from the different banks for the learners. Get as many as you can to allow for spoiled copies. Remember that there are two main lessons to be learned here. One is for learners to understand the meaning behind each slip and how they fit into the process of saving with a savings account. The other is to understand the value of saving, i.e., that having savings empowers you by giving you more choices in time.</p> <p>If possible, you can get a guest speaker from a local bank to talk to the class about saving and savings accounts.</p> <p><b>Instructions to the learners</b></p> <p>Use your answer book to do the following:</p> <ul style="list-style-type: none"> <li>■ Develop an entrepreneurial plan.</li> <li>■ Conduct an interview on opening an account.</li> <li>■ Write a savings plan.</li> <li>■ Complete a deposit slip.</li> <li>■ Complete a withdrawal slip.</li> <li>■ Write four reasons why it is important for you to start saving money now.</li> </ul> <p>Follow the instructions below:</p> <p>3.1 Design an entrepreneurial plan to make some money to save in a bank. Also indicate how much money you expect to make.</p> <p>3.2 Interview a bank clerk (or the school principal, a teacher, an adult at home, or other learners who have opened bank accounts) to find out what is needed to open a bank account and how it's done.</p> <p>3.3 Write a savings plan, indicating how much you plan to save every month and how you can sustain the plan.</p> <p>3.4 Fill in a deposit slip to bank your savings and paste it in your answer book.</p> <p>3.5 Fill in a withdrawal slip to withdraw some money and paste it in your answer book.</p> <p>3.6 Write down four reasons why you think it is important for you to start saving money now.</p> <p><i>Hand in your project to your teacher. Your teacher will mark the work.</i></p> <p><b>Activity 4: Test</b> (all Assessment Standards covered during this term)</p>
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<b>Who assesses?</b>	<ul style="list-style-type: none"> <li>You, as the teacher, will assess activity 1. This is informal assessment and the learners will use the activity to reflect on what they know about savings. It is an introductory activity to find out what the learners already know and to prepare them for the activities to follow.</li> <li>You will assess activity 2 – the learners will hand in the worksheet for you to mark.</li> <li>You will use a rubric to assess activity 3.</li> <li>You will use a memorandum to assess activity 4.</li> </ul>
<b>Barriers</b>	<p>Barriers that may exist for the learner: lack of resources; lack of knowledge; EMS terminology; lack of motivation.</p> <p>Barriers that may exist for the teacher: lack of knowledge or resources; lack of information about the background of the learners; lack of proper planning; lack of enthusiasm; lack of passion in teaching EMS; etc.</p>
<b>Resources</b>	<p>Human resources: guest speaker from a bank; a parent who works in a bank. (Learners may not have access to bank clerks and may have to interview teachers or adults at home or even peers.)</p> <p>Physical resources: banks; deposit slips; withdrawal slips; pamphlets from banks with information on the services they offer.</p>
<b>Evaluate the evidence</b>	<p>The following will be used</p> <ul style="list-style-type: none"> <li>Memorandum (Activity 2), see below.</li> <li>Rubric (Activity 3), see below.</li> </ul>

### ACTIVITY 2: MEMORANDUM

- 2.1 Names of banks
- Capitec
  - ABSA
  - Standard Bank
  - Nedbank
  - FNB
  - Any other acceptable answer. (3)
- 2.2 Reasons why people save their money in banks
- The money is safe.
  - There are rules and regulations that govern banks.
  - To accumulate money for a rainy day, i.e., for expenses that are not planned for.
  - To accumulate money to buy for cash and not on credit.
  - To accumulate money for future needs, like making big purchases like buying a car, paying for education, etc.
  - To make more money by earning interest. (3)
- 2.3 Thrift means frugality (stinginess, self denial, self-discipline, abstinence).
- It means people should be very careful when spending their money.
  - They must care for the money they earn.
  - They must have good financial management skills. (2)
- 2.4 Firstly, I would visit the school and teach learners about the advantages of saving money. I would give them money boxes to help them save some of their pocket money. I would encourage them to open savings accounts and even promise to bring a mobile bank to their school every month so that they could save what they have already accumulated in their money boxes. (Or any other acceptable answer.) (5)



**Rubric to evaluate activity 3 – example in the Intermediate Phase**

<b>Criteria</b>	<b>Level 1 Not achieved</b>	<b>Level 2 Partly achieved</b>	<b>Level 3 Achieved</b>	<b>Level 4 Outstanding</b>
Entrepreneurial plan. Explanation of a product or service to be sold. Explanation of the target market. How the money will be obtained. The total of the money to be gained.	No plan submitted. Incorrect information that shows that the learner has not understood the instruction.	Slothful work that shows no commitment. Little effort was made to do the plan. The plan is incomplete and does not show enough information on how the money will be obtained.	A complete plan showing all detail and all necessary calculations is submitted.	A detailed, complete plan with information to support all steps, calculations and a clear show of how practical it will be is submitted. The plan is clear and shows insight on the part of the learner. It also shows how it will be sustained.
Information obtained from the investigation on how to open a bank account. Procedure followed in opening a savings account.	Information obtained is incorrect to convince that there was an attempt to obtain information on how to open a savings account.	Information obtained is incomplete and shows that there was little attempt to obtain information on how to open a savings account.	Correct information obtained and given on how to open a savings account.	Correct information given on how to open a savings, account presented with supportive information to show that more than one source was used.
A monthly savings plan. Purpose for saving. Duration.	No response given. Incorrect response that shows little understanding of what was required was given. Incorrect response given due to lack of commitment to the task.	Attempt was made to draw a plan showing a monthly savings plan, the purpose for the saving and the duration. The plan provided is incomplete.	A complete plan showing monthly savings plan, the purpose for the saving and the duration.	A detailed complete plan showing monthly savings plan, the purpose for the saving and the duration. The plan shows how the monthly savings will be sustained.
Completion of deposit slip and withdrawal slip.	A mark will be given for each correct information given on the completed deposit slip and withdrawal slip. (Allocate marks)			
Reasons to save money.	A mark will be given for each reason given for saving money now: <ul style="list-style-type: none"> <li>■ Save money to buy a product cash and not incur debt.</li> <li>■ To accumulate money for the future for a certain purpose, e.g., to open own business.</li> <li>■ To grow the economy.</li> <li>■ To have money when it is needed.</li> <li>■ To earn interest or to make more money.</li> <li>■ Discipline – to not consume everything you obtain.</li> <li>■ To not be a burden to anybody in case of need.</li> <li>■ Any other acceptable answer.</li> </ul>			

**(4)**

An example of a scoring rubric					
Criteria	1	2	3	4	Score
Criterion 1				X	4
Criterion 2			X		3
Criterion 3				X	4
Criterion 4		X			2
Total					13

Example – Economic and Management Sciences – Assessment Programme in the Senior Phase, Grade 9					
	LOs and ASs	Assessment task	Focus	Forms of assessment	Context
<b>Term 1 Task 1</b>	<p><b>LO1 – Assessment Standards:</b> Explains the different flows of money, factors of production, goods and services in the economic cycle within the South African economy.</p> <p>Critically assesses the influence and actions of (strikes and stayaways) of trade unions in general and during the apartheid era on:</p> <ul style="list-style-type: none"> <li>■ The South African economy;</li> <li>■ Political, economic and social transformation;</li> <li>■ Labour issues.</li> </ul> <p><b>LO 2 – Assessment Standard:</b> Discusses productivity and its effects on economic prosperity, growth and global competition.</p> <p><b>LO3 – Assessment Standard:</b> Researches the laws affecting basic conditions of employment and non-discrimination in the workplace.</p>	Investigation of how labour impacts on the economy.	The flow of money in the economic cycle, trade unions and their influence in the economy, productivity, globalisation and economic growth.	<p>Discussion</p> <p>Investigation</p> <p>Interview</p> <p>Written presentation</p> <p>Test (all Assessment Standards covered to date)</p>	How the economy functions.

	LOs and ASs	Assessment task	Focus	Forms of assessment	Context
<b>Term 2 Task 2</b>	<p><b>LO4 – Assessment Standards:</b></p> <p>Generates through SWOT Analysis, possible business ideas to meet the need for manufactured goods and services.</p> <p>Develops a business plan (including a budget) for a manufacturing, service or tourism enterprise based on the best business opportunity from ideas generated.</p> <p>Engages in the business activity planned and discusses the reasons for choosing a particular form of ownership.</p> <p>Conducts marketing campaign to promote a product and discusses the self selected advertising media.</p> <p><b>LO3 – Assessment Standard:</b></p> <p>Completes a basic income statement and balance sheet for a service and retail business</p>	Start and run your own business. (This is the first of two businesses that learners will start and run this year. If they develop a sustainable idea, they may wish to continue running this business throughout the third term.)	SWOT Analysis Business ideas Business opportunity Budget Business plan Forms of ownership Business activity Marketing campaign Advertising media Income statement Balance sheet	Discussion Research Written presentation Demonstration Test (all Assessment Standards covered to date)	Entrepreneurial knowledge and skills.
<b>Term 3 Task 3</b>					

Planning for Assessment at Lesson Plan level: A Senior Phase example	
An example of Assessment Plan at Lesson Plan level – Grade 9	
<b>Learning Outcome</b> (from assessment programme)	<b>LO 1:</b> Economic cycle <b>LO 2:</b> Sustainable growth and development <b>LO 3:</b> Managerial, consumer and financial knowledge and skills
<b>Assessment Standards</b> (from assessment programme)	<b>LO 1: AS:</b> Explains the different flows of money, factors of production, goods and services in the economic cycle within the South African economy. <b>LO 1: AS:</b> Critically assesses the influence and actions of (strikes and stayaways) of trade unions in general and during the apartheid era on: <ul style="list-style-type: none"> <li>■ The South African economy;</li> <li>■ Political, economic and social transformation;</li> <li>■ Labour issues.</li> </ul> <b>LO 3: AS:</b> Researches the laws affecting basic conditions of employment and non-discrimination in the workplace. <b>LO 2: AS:</b> Discusses productivity and its effects on economic prosperity, growth and global competition.
<b>Assessment Form</b> (from assessment programme)	Written presentation in the form of a worksheet Project Test (all Assessment Standards covered to date)
<b>Knowledge, Skills and Values</b> (derived from assessment programme)	<b>Knowledge:</b> The flow of money in the economic cycle; the actions of trade unions in the economy; the impact of strikes and stayaways economically, politically and socially in the past and currently; the reasons why workers strike; labour laws – basic conditions of employment and non-discrimination in the work place; labour and productivity; productivity and economic growth; labour laws, productivity and global competition. <b>Skills:</b> Explaining the flow of money; collecting information from different sources (e.g., textbooks, magazines, newspapers, internet, etc.) on the economic, political and social impact of strikes and stayaways in the past and currently; analysis of labour laws on basic conditions of employment and non-discrimination; evaluating the impact of labour on productivity; discussing the impact of productivity on economic prosperity, growth and global competition. <b>Values:</b> Accountability; patriotism; appreciation of what it means to play a role in the economy; willingness to make a positive contribution to the economy.
<b>Assessment Task</b>	Investigation of how labour impacts on the economy.

<b>Barriers</b>	Barriers pertaining to both the learner (EMS terminology, disabilities, lack of interest, unwillingness to collect information, lack of resources etc.) and the teacher (lack of proper planning, lack of knowledge, lack of enthusiasm, lack of passion in teaching EMS, etc.)
<b>Resources</b>	Newspapers, books, magazines, case studies, guest speakers.
<b>Evaluate the evidence</b>	The following will be used: Memorandum for homework activity 2. Rubric and mark allocation guideline for activity 3. Memorandum for activity 4.

**ACTIVITY 1: GROUP ACTIVITY****Gathering evidence****Form of Assessment: Discussion****Informal assessment**

Learners must demonstrate prior knowledge of concepts by discussing the following in their groups:

- The economic cycle;
- Role of trade unions;
- The names of trade unions in South Africa;
- Labour laws;
- Productivity;
- Labour as a factor of production; and
- Labour and productivity.

*You can assess this task informally by observing learners' discussions. You should try to get a feeling for what learners already know about the topic.*

**ACTIVITY 2: INDIVIDUAL ACTIVITY****Form of Assessment: Written work (homework)****Tool for gathering evidence: Memorandum**

Draw a picture diagram that describes the economic cycle. Your picture diagram should clearly show the flow of money, goods and services in the economy.

*You will mark the homework and give marks for each learner.*

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**ACTIVITY 3: INDIVIDUAL ACTIVITY****Form of Assessment: Assignment****Tool for gathering evidence: Rubric and mark allocation guideline****Instructions to the learner**

1. Collect information from different sources (e.g., textbooks, magazines, newspapers, the internet, interviews,

etc.) on the impact of actions (strikes and stayaways) of trade unions on the economic, political and social environments in the past and present. You should look for information that shows the influence of trade unions and the results of their actions. You should gather at least three pieces of information about trade union action in the past, and also at least three pieces about the present. Try to vary the sources that you use.

2. Divide the information you collected into two sections: A) The past; and B) The present. You can use as much space in your books for each section as you need.
3. Analyse the information and write a report that follows the method below (Copy the **Aim** section into the start of your report; list the resources you used in the **Resource** section; follow the guidelines below for you **Method** and **Conclusions** section.):

**Aim:**

1. To investigate the impact of trade union actions on the economic, political and social environments in the past and present; and
2. To describe what is similar and what is different about the roles played by trade unions in the past and present.

**Resources:**

Information gathered from multiple sources.

**Method:**

Study your sources of information and describe paragraph what each tells you about trade unions in the past and present. Once you have described what each source tells you, you should compare them to explain what you think is similar and what is different between trade union actions in the past and in the present.

**Conclusions:**

Write a paragraph that summarises what you have concluded about what is similar and what is different between trade union actions in the past and present. (40)

*You will mark the assignment and allocate marks for each individual learner. You should give the rubric to the learners before they embark on the assignment. You will use the rubric, as well as the mark allocation guideline, to evaluate the learners' work.*

#### ACTIVITY 4: GROUP WORK AND INDIVIDUAL WORK

**Form of Assessment: Discussion (informal assessment) and worksheet**

**Tool for gathering evidence: Memorandum for the worksheet**

**Group discussion**

Facilitate a discussion with the learners, based on the extracts below. The extracts explore the following concepts:

- Labour and productivity;
- Labour laws;
- Economic growth; and
- Global competition.

Make sure that the learners discuss all the questions below. You can do this by writing the questions on the board. Or you could start by posing a single question to the class and then ask the learners to discuss the question in their groups.

You could then go from group to group posing more questions. You can use any method you wish, as long as the learners cover all the content that the questions imply.

- Why do you think Foreign Direct Investment not attracted to South Africa as was initially anticipated?
- Why do you think the labour market in South Africa not productive, but very expensive?
- What do you think is the productivity status of the country – is it a low or high productivity country? Why?
- Why do you think that manufacturers around the world would rather go to countries where labour is cheap than where labour is expensive?
- What do you think is the impact of imports on the South African economy, e.g., in the textile industry?

*You will assess the discussions informally and make your own observations*

### **Instructions to learners**

Read the article extracts below and discuss them in your groups before you do the individual work. Your teacher will pose some questions for you to consider as the basis for your discussion.

### **Extracts from articles**

In your groups critically analyse and discuss the following extracts on labour issues relating to productivity in South Africa.

#### ***Source A***

Labour is possibly the most important factor of the economy, because without labour we cannot change natural resources into goods and services. Labour is very important to the organisation's success or failure. Organisations need people to work productively. For the important work done, organisations give their workers money. Labour is often difficult to manage because people can be unpredictable.

#### ***Source B***

The Reserve Bank governor, Tito Mboweni, has expressed concern that higher wages are causing unit labour costs to rise again in South Africa, which is impacting negatively on productivity. If economic growth is to achieve the five percent target, then productivity will need to rise faster than wages.

#### ***Source C***

Labour costs and productivity also need close attention. Basic wage rates are often higher than elsewhere in Southern Africa and South East Asia, yet productivity is often low in South Africa.

#### ***Source D***

Increased productivity is a necessary condition and not an incidental element to improve standards of living in Africa, said a research analyst.

#### ***Source E***

An estimated 7000 members of the trade union took part in the march to protest against job losses all over South Africa. The trade union wants:

- Retailers to stock 75% local goods and a much greater effort to avoid job losses;
- Casual workers of more than three months to be treated as permanent staff;
- Government to put more pressure on business to save jobs and structure policy in such a way as to grow jobs;



- Government to buy locally manufactured goods; and
- Trade policies that aim to save jobs.

**Source F**

A leading Chinese trade unionist in Shanghai said that the role of the union is to encourage workers to be productive. Not to go on strike. That is partly why China's economy has grown. Foreign trade has grown by an average of 15 per cent a year from 1978.

**Source G**

Other companies have done their homework. Being in South Africa has got advantages and disadvantages. There are also times when there is labour volatility (instability, unpredictability) that can impact on the ability to deliver vehicles and components to export and domestic markets.

**Source H**

Gold miner, Gold Fields, hit by what it is calling an unprotected strike, says the tens of thousands of workers who did not report for duty yesterday had lost wages worth R7 million for the day, while the company lost R37 million. The strike was over issues including living out allowances and allegations of racism.

**Source I**

South Africa has not reached its anticipated level of Foreign Direct Investment. One of the reasons is that foreign companies are more focused on efficiency and productivity. Wages should reflect productivity.

**Source J**

Labour Minister Membathisi Mdladlana this week released the industrial action annual report. It shows 3.8 million man-days were lost following strike action last year... Because of the sheer size of the civil service, a one-day strike could easily result in the loss of 800 000 workdays

**Source K****Transnet about to strike**

The four labour unions at Transnet lodged a 48-hour notice of strike action on Friday over the group's restructuring negotiations. Transnet wants to privatize some business units and transfer others to existing ones within the stable. The unions say these changes will affect 30 000 employees as well as employment conditions and future security. The union members regret the necessity to take strike action, but consider that they have no option. The union was keen to work with Transnet until a satisfactory deal had been obtained but they have displayed a lot of arrogance resulting in the union members voting to take strike action.

**Individual activity: worksheet**

- 4.1 From what you have read, what do you think is the status of productivity in South Africa? Would you say that South Africa has high or low productivity? Elaborate. (5)
- 4.2 Discuss the reasons that may lead workers to strike. (5)
- 4.3 Discuss the responsibilities of labour to management. (5)

4.4 A business owner, who is facing difficulties because his workers are not productive, is seeking your advice. His workers display the following tendencies:

- They come to work very late.
- They abuse sick leave (they are always taking sick leave, when they probably aren't sick at all).
- They abuse resources at work, e.g., telephone bills are high and the calls are not work related, and they take home some of the tools that are the property of the company.
- When they are at work they do not do what is expected of them.
- When the owner tries to talk to them, they convene lengthy meetings threatening him with strikes.

Write a note to the business owner in which you give him five pieces of advice that will help to solve his problem. (5)

#### ACTIVITY 5: INDIVIDUAL WORK

##### **Form of Assessment: Test**

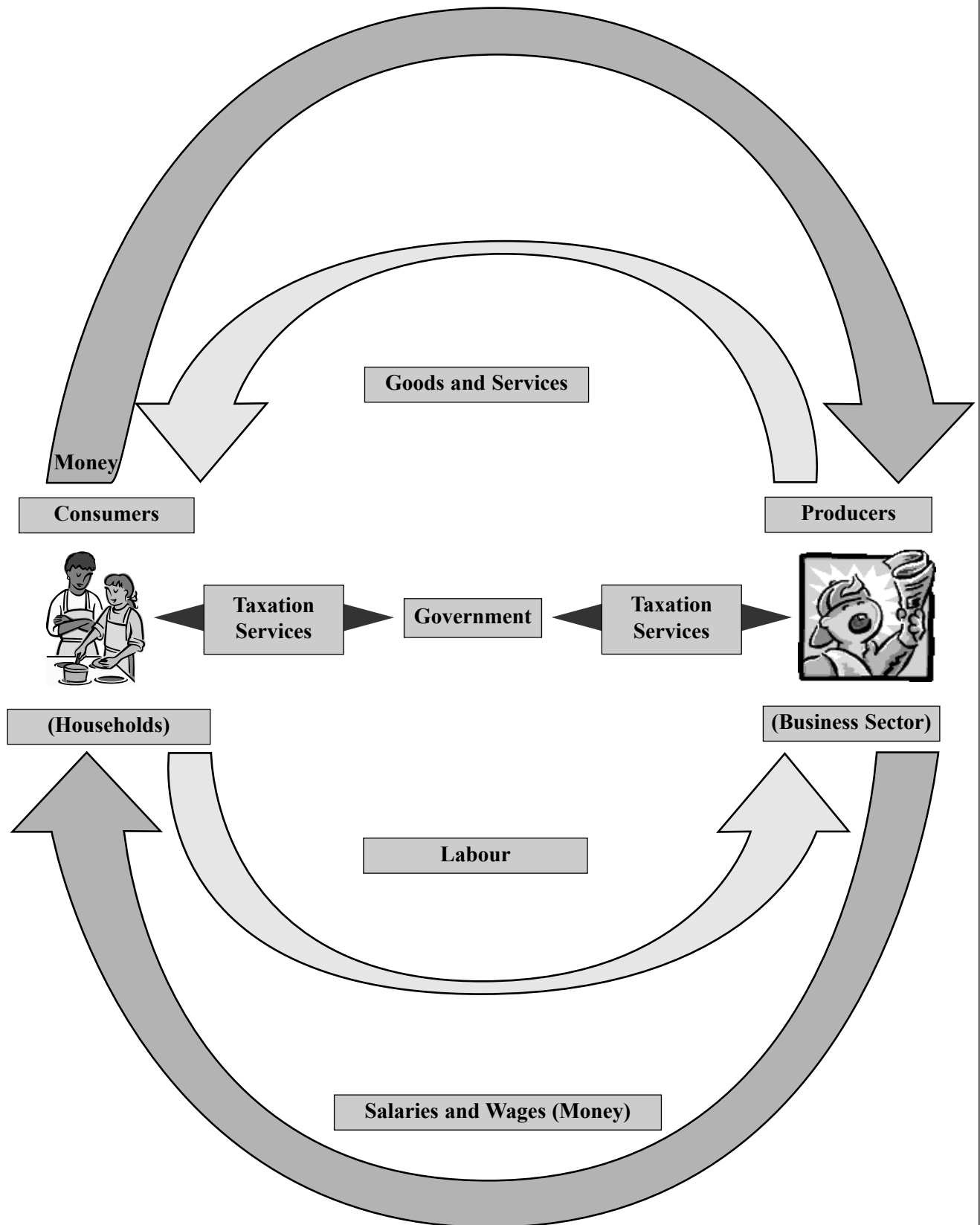
This test should cover all the work done during the term, i.e., all the Assessment Standards that were assessed both formally and informally.

##### **Tool for gathering evidence: Memorandum**

*You will set the question paper and mark the answer sheets/books.* (32)

## Example given as memorandum for activity 2

The flow of money in picture form



Rubric to mark activity 3: Grade 9 example in the Senior Phase				
Criteria	Level 1 Not achieved	Level 2 Partly achieved	Level 3 Achieved	Level 4 Outstanding
Information obtained from different sources on the past and in the present.	Information obtained is incorrect and irrelevant. Does not convince that there was an attempt made to obtain information.	Information obtained is incomplete and shows that there was little attempt to obtain information.	Correct, relevant and accurate information obtained and given.	Correct, relevant and accurate information obtained and given with supportive information to show that much effort was put into the work done.
Impact of actions of trade unions (strikes and stayaways) on the economic, political and social environment in the past and present (findings and conclusions).	Information obtained is used in an incorrect, irrelevant manner. Conclusions and findings do not show understanding or are not given at all.	Information obtained is not used correctly and findings and conclusions are incomplete and show little understanding.	Correct, relevant and accurate information obtained is used correctly and findings and conclusions are convincing.	Correct, relevant and accurate information obtained is used correctly and given with supportive information that shows clear understanding and is convincing enough to show that much effort was put into the work.

### Mark allocation guideline

In addition to using the rubric above, you could use the following mark allocation guideline:

Content	Marks
Sources of information.	6 x 2 marks = 12
For the description of what each source explains.	6 x 3 marks = 18
For comparing the differences between trade union actions in the past and in the present.	6 marks
Conclusion	4 marks
<b>Total</b>	<b>40 marks</b>

**MEMORANDUM TO MARK ACTIVITY 4: WORKSHEET**

- 4.1 South Africa generally has low productivity. This is linked to the fact that we have a high unemployment rate. Unemployed people have a zero level of productivity. Another reason for low productivity is that frequent striking by workers causes massive losses of working hours to businesses. Large union membership means that strikes and stayaways can have a crippling effect on industry.
- 4.2 Any of the following reasons for strikes are acceptable, as well as any other logical reasons the learner can think of:
- Mistreatment of workers, both permanent and casual.
  - Wage disputes and other remuneration disputes.
  - Disagreement with government policy affecting workers, e.g., policies over imports and exports that affect how local businesses can compete on an international scale.
  - The bad attitudes of management towards workers' grievances.
  - Racism or any other prejudice against workers, such as religious prejudice.
- 4.3 Any of the following responsibilities are acceptable, as well as any other reasonable responsibilities that the learner can think of. Workers should:
- Come to work on time.
  - Come to work in a state that is fit for the job.
  - Use sick leave responsibly, i.e., only when sick.
  - Request permission to take company property home with them.
  - Fulfil all the duties in their job description to the best of their ability.
- 4.4 Any of the following suggestions to the business owner are acceptable, as well as any other logical suggestions that the learner can think of:
- Call a meeting with the workers' union officials and the shop steward. Urge them to encourage the workers to change their attitudes.
  - Start a penalty system for unacceptable behaviour. Get the union to buy into the system, by asking them for guidelines as to what is and what is not acceptable behaviour.
  - Start an incentive system for positive, productive behaviour.
  - Identify the few individuals that are inciting others to be unproductive and issue them with letters of warning for their behaviour.
  - Separate individuals who may be a bad influence on each other and those around them.

**4.3.3.8 Example of how more than one activity can be developed from one Assessment Standard in the Senior Phase**

When you unpack an Assessment Standard, you are mining it for all its learning potential. A single Assessment Standard carries hundreds of associations that represent a huge amount of knowledge.

**Grade 9: LO 4**

Assessment Standard: Generates, through SWOT Analysis, possible business ideas to meet the need for manufactured goods and services.

**Activity 1 (Group)**

In the next five minutes, brainstorm as many business ideas as you can think of for manufactured goods or services that you could sell in your community. Then choose the best three ideas and write the titles of the businesses in your books.

**Activity 2 (Individual)**

In your books, write short paragraphs to describe each idea.

**Activity 3 (Individual)**

Which of the three businesses you have thought of do you think is most closely suited to your own skills, knowledge, values and interests? Choose one of the three now and write the title of the business in your books.

**Activity 4 (Group)**

Imagine that you could use your school as the location to open just one of your businesses. Which one do you think would best suit the location, and why? Discuss this in your groups for a minute or two before going on to the next activity.

**Activity 5 (Individual)**

Imagine that your school is moving to a new location. Now you have the opportunity to buy the land and buildings for a very low price. You want to use the land to open one of the three businesses you have been thinking about, but you're not completely sure which one. As a location for any of your businesses, your school has certain strengths and weaknesses. There are also opportunities surrounding the location, as well as threats.

Do a SWOT Analysis of your school's location for each of the three businesses. This will help you to compare the three businesses to decide which would be the best to open in your school's location. Copy the table below into your books and then complete the SWOT Analysis.

	Business 1	Business 2	Business 3
<b>Strengths</b> <i>How do I capitalise on strengths?</i>			
<b>Weaknesses</b> <i>How do I address weaknesses?</i>			
<b>Opportunities</b> <i>How do I maximise opportunities?</i>			
<b>Threats</b> <i>How do I minimise threats?</i>			

**Activity 6 (Individual)**

Based on your SWOT Analysis, compare all three business ideas and choose the one that you think is best suited to your school's location. Make your choice now and write the title of the business in your books.

**Activity 7 (Individual)**

Is the business you chose in Activity 3 the same as the one you chose in Activity 5? If so, write a short paragraph explaining all the reasons why it is the best choice of business you could make for yourself and for the location.

If you did not choose the same business in activities 3 and 6, then write a short paragraph that explains whether you would like to make a compromise and open just one of the businesses, or whether you think it is best for you not to open either business. Give reasons for your choice.

**4.4 Continuous Assessment in Grades 4–8**

In Grades 4–8, CASS makes up 100% of the final Economic and Management Sciences mark or level of achievement. You will use formal, recorded tasks to determine if learners progress to the next grade.

Formal recorded assessment for Grades 4–8					
Term	1	2	3	4	<b>Total CASS</b>
Task (No)	1	1	1	1	4

CASS consists of 1 formal recorded assessment task per term, which means that there will be four formally recorded assessment tasks in a year in Grade 4–8. The four assessment tasks over the year should give learners the chance to explore all the Learning Outcomes and Assessment Standards in EMS.

Examinations or controlled tests may be used in addition to the other forms of assessment planned for each term in EMS. The reason for this is to cover Assessment Standards that cannot be included in the planned assessment tasks.

**4.5 Continuous and External Assessment in Grade 9**

In Grade 9, the CASS component consists of tasks undertaken during the school year, which count for 75% of the final Grade 9 mark or level of achievement. The other 25% is made up of externally set assessment tasks called Common Tasks for Assessment (CTA). Within EMS, CASS will consist of three tasks, with one task per term for the first three terms. The CTA will be administered during the fourth term.

Table showing formal recorded assessment for Grade 9				
Term	1	2	3	4
Task	1	1	1	CTA
				Performance-based task and Pen-and-paper task (controlled)
	75%			25%

#### **4.5.1 Common Tasks for Assessment in CTA Grade 9**

The CTA in EMS is conducted under a central idea, or theme, that is relevant to the current economic environment. It covers the knowledge and skills required of a grade 9 learner as described in the EMS Learning Area Statement.

The CTA is an external assessment tool intended to sample learner performance against the learning outcomes. The CTA, in all Learning Areas, should consist of both performance-based tasks and pen-and-paper tasks.

The pen-and-paper task will be conducted under controlled examination conditions such as prevail for the National Senior Certificate and schools will follow a national timetable. The pen and paper task will cover almost all the Assessment Standards in Grade 9 that is the work that was done throughout the year.

The performance-based tasks should be designed in such a way that they are completed or administered over a period of time and not as a once-off event. The performance based task will cover a group of Assessment Standards that are relevant to the topic selected for the particular year, e.g. Financial Literacy, Globalisation; Tourism , Proudly South African and Entrepreneurship .

Performance-based tasks can be done in the classroom or as homework. These tasks can include projects, oral, or pen-and-paper activities. Learners can be required to do tasks as individuals, in pairs or in groups. Groups are more for discussions and most of the work will be done by the individual learners.

Performance-based tasks will cover almost all of the broad categories of learning of EMS namely:

- ▶ Economic Literacy;
- ▶ Financial Literacy;
- ▶ Consumer Literacy;
- ▶ Entrepreneurial knowledge and skills;
- ▶ Managerial knowledge and skills; and
- ▶ Leadership knowledge and skills.

Weighting of the EMS Learning Outcomes will be taken into consideration in the CTA.

ALL Grade 9 learners in all schools will be assessed through the CTA in all the eight Learning Areas, including the Additional Language, during the fourth term.

##### **4.5.1.1 Administering the CTA**

It is important that the administration of the CTA is planned carefully. It should form an integral part of the normal teaching and learning school programme and it should be aligned to the school's timetable. This means that the school should not stop teaching because it is time for CTA administration. Again, a new school timetable is not required.

The CTA usually consists of two books, the teacher's and the learner's guide.



Learning Area-specific guidance is included in the teacher's guide. These give detailed information needed to administer each task of the CTA and you should read them before you start administering the CTA. This will enable you to integrate and find opportunities in the timetable for this integration.

The learners' guide has clear instructions and activities for the learners to do.

#### 4.5.1.2 Roles and responsibilities of the teacher

Learners bring valuable experiences into the classroom. Your role is to initiate discussion and reflection, in which learners' prior knowledge is acknowledged, and then valued. You also need to challenge learners with new ways of making meaning through the EMS.

##### *In a CTA, you will:*

- ❖ Contextualise the CTA;
- ❖ Discuss the flow chart with the learners;
- ❖ Explain the criteria for assessment to all learners before commencing each activity;
- ❖ Guide brainstorming sessions;
- ❖ Organise manageable groups;
- ❖ Help allocate group roles;
- ❖ Ensure that activities are completed within specified time frames;
- ❖ Supervise the process;
- ❖ Intervene and troubleshoot where and when necessary;
- ❖ Be responsible for including tasks and the various forms of assessment in the learners' portfolios;
- ❖ Engage interactively with learners;
- ❖ Distribute the worksheets provided to learners per activity; and
- ❖ Mark the relevant sections of the CTA.

#### 4.5.1.3 Writing of CTA

Example of an Economic and Management Sciences CTA Assessment Task				
Activity 1.2 The Productivity Concepts and Entrepreneurship				
≡ Group work	† Individual Activity	⌚ Time: 120min	✓ Marks: 25	
<b>Form of Assessment: Written presentation</b> <b>Learning Outcome:</b> <b>LO 4 AS 2:</b> Develops a business plan (including a budget) for a manufacturing, service or tourism enterprise based on the best business opportunity from the ideas generated. <b>LO 2 AS 4:</b> Discusses productivity and its effects on economic prosperity, growth and global competition. <b>In this activity you are going to be assessed on your ability to:</b> <ul style="list-style-type: none"> <li>■ Draw a business plan incorporating productivity concepts and to conclude whether all entrepreneurs are productive or not?</li> </ul>				

**Instructions:**

- Refer to the glossary at the back of your Learners' Book to familiarise yourself with the terms related to productivity. Discuss the concepts together as a class. The teacher will lead the discussions. Make sure that you understand these concepts so that you can apply them to your business plan (productivity, input, output, effectiveness, efficiency, quantity, quality, customer/targetmarket, machines (capital), production).

**See Annexure 3**

- Apply these concepts in drawing up your business plan.
- Draw a business plan by answering all questions in a poster format. You can use a double page of your answer book. Use the first page of your double page to write your name and title, e.g., business plan of ... and write the name of your business and contact details, as a cover page. Make sure it is attractive and legible. Use any creative or innovative ideas that you can think of. However, do not take too much of your time being creative and not going to the questions. On the second, third and fourth pages, write the answers. First write the number, e.g., '1.2.1' and then write the answer. Present the written work to your teacher for marking.

You entered a business plan competition and you could win R20, 000. You are required to draw a business plan for a manufacturing business, by answering the following questions:

- |        |   |     |
|--------|---|-----|
| 1.2.1  | State the name of your business (it must be original, use your creativity, it should not be the name of a business that you already know) | (1) |
| 1.2.2  | Describe your business opportunity  | (2) |
| 1.2.3  | Define the machinery that you will need for the production of goods.  | (2) |
| 1.2.4  | Determine the input in your production process  | (2) |
| 1.2.5  | Describe your output in detail  | (2) |
| 1.2.6  | Calculate the quantity of goods and services you can produce with the quantity of input you have given                                    | (2) |
| 1.2.7  | How many products do you plan to produce per hour and how many hours will you have?   | (2) |
| 1.2.8  | Describe how you will ensure effectiveness as an entrepreneur.  | (2) |
| 1.2.9  | Determine how you will ensure efficiency in your business   | (2) |
| 1.2.10 | Evaluate your products and give a description of how you will ensure the quality of the products you aim at your customers                | (2) |
| 1.2.11 | Give the reasons that you need to evaluate the quality of your products.  | (2) |
| 1.2.12 | Identify your target market and describe it also in terms of age and geographical location.   | (2) |
| 1.2.13 | Drawing from your experience, conclude whether or not you think that all entrepreneurs are productive or not?                             | (2) |

#### 4.5.1.4 Marking of CTA

As learners complete tasks, teachers at the school should mark these and provide immediate feedback to the learners. Therefore teachers would have enough time to finalise the CTA and provide final results before the end of the school year. Note that the CTA constitutes 25% of the final result.

Different tools can be used for marking a CTA. These are some of the tools that are mostly used:

INFORMATION SHEET	
Tools for judging evidence	
Checklists	These are useful for assessing products and processes against a list of criteria.
Rating scales	Allow you to assess and record the level of achievement quickly and accurately. Numbers, symbols or words can be used. Rating scales are often combined with a checklist of criteria and are also used in rubrics.
Rubrics	Consists of criteria and levels of competency (performance). Each level has clear descriptors against each criterion.
Marking memoranda	Marking memoranda set 'model answers' which can be used as baseline information against which learners' work is assessed.
Observations sheets (with criteria)	Observation sheets are similar to checklists, but they are used when observing learners. Observations allow the teacher to focus on what the learners are doing and how they are behaving in a particular activity or context.

Example of a memorandum for activity 1.2: The Productivity Concepts and Entrepreneurship		
	Question	Possible Answers
1.2.1	Name of business	4 U Quality Suppliers ✓
1.2.2	Description of business	Business manufacturing quality fashion for the teens ✓✓
1.2.3	Machines (capital)	One Industrial sewing machine, one overlocker, one industrial iron and ironing board, a table, chairs, pair of scissors, measuring tapes, pins, needles, drafting paper ✓✓
1.2.4	Input	For making fashion designer tops: <ul style="list-style-type: none"> <li>■ Labour</li> <li>■ Capital/machines (mentioned above)</li> <li>■ Materials (10 metres of colourful materials: 2 metres each for the tops, 25 buttons, one sewing cotton, 1 metre iron-on, 1 pattern)</li> </ul> ✓✓
1.2.5	Output	Sleeveless or short sleeved summer tops in bright colours (yellow, lime, orange, royal blue, red) with a big embroidered "4 U" on the front of the top and with buttons. ✓✓
1.2.6	Quantity	Five tops ranging from size 28–36. To complete each top, the following are needed: <ul style="list-style-type: none"> <li>■ 2 metres of material</li> <li>■ 5 buttons</li> <li>■ 1 sewing cotton</li> <li>■ 20 cm iron on</li> </ul> ✓✓

1.2.7	Hours needed	15 hours needed to produce five tops. Each top takes three hours to produce. ✓✓
1.2.8	Effectiveness	<ul style="list-style-type: none"> <li>Study the market of teens and ensure producing tops that they like (that will be in demand).</li> <li>Will improve on already existing patterns that teens like, e.g., well-known brands they associate themselves with but at a cheaper price. ✓✓</li> </ul>
1.2.9	Efficiency	Ensure maximum use of the three hours allocated to cut and to sew one top. The off cuts will be used to decorate other tops. ✓✓
1.2.10	Quality	<p>Make sure that the standards set are met. The correct size, the correct design, quality of material is good.</p> <p>In future when the business grows, I will ensure quality through South African Bureau of Standards. ✓✓</p>
1.2.11	Reason for evaluating the quality of goods	<ul style="list-style-type: none"> <li>There is a lot of competition. Producing quality goods that your customers need puts you at an advantage compared to your competitors.</li> <li>Customers will be loyal to the brand if it is of quality. ✓✓</li> </ul>
1.2.12	Target market	Girls of the age 8–20, who are brand conscious and fashionable. ✓✓
1.2.13	Conclusion on whether all entrepreneurs are productive or not	<ul style="list-style-type: none"> <li>Not all entrepreneurs are productive. Some entrepreneurs produce goods that will not meet the needs of the target market (i.e., goods which they do not have a market for or customers do not prefer and this will be a waste of resources, labour and materials) because the cash is locked in the stock that is not moving.</li> <li>Some entrepreneurs do not really check the quality, effectiveness, efficiency and the quantity in their production.</li> <li>Entrepreneurs need to be exposed to productivity programmes to be more productive. ✓✓</li> </ul>
<i>The learners will hand in the written presentation for marking</i>		

#### 4.5.1.5 Recording of CTA

This sheet on the following page is an example of an EMS CTA Recording Sheet. Schools can make up their own documents. The final mark can be converted according to the 7 scale for reporting.

#### 4.5.1.6 Reporting in Grades 7–9

The national codes, together with either the descriptors or percentages provided in the table below, should be used for recording and reporting learner performance in Grades 7–9. Comments should be used to qualify learner performance.

**Table: Codes and percentages for recording and reporting in Grades 7–9**

Rating code	Description of competence	Percentage
7	Outstanding achievement	80–100
6	Meritorious achievement	70–79
5	Substantial achievement	60–69
4	Adequate achievement	50–59
3	Moderate achievement	40–49
2	Elementary achievement	30–39
1	Not achieved	0–29

Schools should issue learner reports to the parents by the end of the last day of the fourth term. The completed progression schedule should then be submitted to the District Office at the end of the year. When learners qualify for condonation, the school will make a recommendation to the District Manager who will grant final approval.

CTA RECORDING SHEET	
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**Grade 9**                      **Date:** \_\_\_\_\_                      **School:** \_\_\_\_\_

Date: \_\_\_\_\_

**School:** \_\_\_\_\_

[illegible]

## 4.6 Management of Assessment

### 4.6.1 Progression in Grades 4–8

Ideally all learners in Grades R–8 should progress with their age cohort.

Any decision about progression should be based on the evidence of a learner's performance against the recorded assessment tasks.

Where a learner needs more time to demonstrate achievement, decisions shall be made based on the advice of the relevant role-players: teachers, learners, parents and education support services (ESS).

No learner should stay in the same phase for longer than four years (or five years in the case of the Foundation Phase where Grade R is offered), unless the provincial Head of Department has given approval based on specific circumstances and professional advice.

If a learner needs more time to achieve the Learning Outcomes, s/he need not be retained in a grade for a whole year. It is important that a learner support strategy be put in place to support such learners.

### 4.6.2 Promotion in Grade 9

A learner is promoted from Grade 9 on the basis of demonstrating competencies that reflect a balanced spread over all eight learning areas, and which have been assessed through a continuous assessment programme and an external summative assessment component.

A learner will be promoted to Grade 10 only if s/he has satisfied the following achievement requirements:

- a) At least a 'moderate achievement' or level 3 rating in one of the Languages offered and Mathematics;
- b) At least an 'elementary achievement' or level 2 rating in the other language; and
- c) At least a 'moderate achievement' or level 3 rating in four other Learning Areas

All eight Learning Areas are compulsory and the assessment of all eight is compulsory, but awarding of the qualification will be based on Languages, Mathematics and four other Learning Areas.

The learner will be promoted only if s/he satisfies the requirements of both the Continuous Assessment (75%) and the External Assessment components (25%).

### 4.6.3 Condonation in Grade 9

The minimum requirements in terms of offering eight Learning Areas, a minimum of two languages, and evidence of performance in CASS and CTA should be met before condonation may be considered.

A learner's results will be condoned only once in either of the following cases:

- a) When he/she achieves elementary achievement or level 2 in Mathematics;
- b) When he/she achieves elementary achievement or level 2 in Languages;
- c) When he/she achieves elementary achievement or level 2 in only one of the four other Learning Areas required for promotion;

Grade 9 signifies an exit point in the education system. All accredited examining bodies must meet assessment in terms of the provision of the Quality Assurance Council for General and Further Education and Training (Umalusi).

#### **4.6.4 Managing the Assessment Plan**

Each school must have a **School Assessment Plan**, which outlines how CASS is planned and implemented. It includes:

- ▶ How records are kept, stored and accessed;
- ▶ Assessment codes;
- ▶ Internal verification;
- ▶ Moderation;
- ▶ Frequency and method of reporting;
- ▶ Monitoring of assessment process; and
- ▶ Training of staff.

Each school should also have a **School Assessment Programme**, which is a compilation of all grade assessment plans

Each teacher must have an **Annual Assessment Programme**, which is derived from the Work Schedule and indicates the details of formal assessment per grade.

## **5. PORTFOLIO**

### **5.1 Teachers' Portfolio**

- All teachers are expected to keep a portfolio containing all documents related to assessment. It is teachers' responsibility to ensure that the information in their assessment portfolios is kept up to date.
- A teacher assessment portfolio may be a file, a folder, a box, or any other suitable storage system and should include the following:
  - ▶ Policies and supporting documents
  - ▶ National Curriculum Statements
  - ▶ Learning Programme Guidelines
  - ▶ EMS Teachers Guide and Assessment Guidelines
  - ▶ Annual Assessment Plan
- Teachers' portfolios should contain the tasks for assessment as well as the planning that informs the development of these tasks and the records of assessment of the formal tasks, assessment tools and the record sheets.
- Teachers should as part of their planning provide assessment planning at all levels of planning.



- The formally recorded assessment tasks should be clearly marked or indicated in the teacher's portfolio. Stickers, coloured paper, etc. may be used for this purpose.
- Teachers' portfolios should be available on request at all times for moderation and accountability purposes.

## **5.2 Evidence of Learner Performance**

Evidence of learner performance is proof of a learner's knowledge, skills and values. Evidence of learner performance is collected and the competence level is evaluated to prove learner progress in the learning progress.

Collection of evidence of learner performance is a way of tracking learner progress using a variety of forms of assessment throughout the year.

Evidence of learner performance (conceptual progression and achievement) is collected to make decisions about the progress of learners and the teaching and learning process.

Evidence of learner performance can include

- A completed assessment tool which reflect learner achievement e.g. checklist, rubric, criteria list on which performance is indicated
- A completed assessment task e.g. test, essay
- A product e.g. Business plan
- A recording of a performance, e.g. market day, in a relevant format e.g. video tape, cassette tape, DVD, electronic storage device – especially in situations where the teacher will not have a product to assess after the performance

Evidence of learner performance collected can be stored in

- Exercise books, including Ledger, Cash and Journal books for EMS and Accounting/file for each learner for written activities/exercises with marked assessment tools/boxes clearly marked, envelopes computers etc. Note: Assessment Tasks must be clearly indicated/flagged e.g. stickers or separate section in file

In the case of E-Accounting/EMS keyboard skills evidence can be stored in

- Electronic storage medium, e.g. flash disk or folder on the server – regular backed up.
- Marked assessment tools filed in electronic file
- Continuously – learner folders are written to CD to be filed



## ANNEXURES

### **ANNEXURE 1**

Glossary

### **ANNEXURE 2**

Various Forms or Types of Assessment

### **ANNEXURE 3**

Glossary

### **ANNEXURE 4**

Extracts from Financial Services Consumer Education: Plan your financial future

### **ANNEXURE 5**

Example of a Learning Area Recording Sheet

### **ANNEXURE 6**

Example of a Progression Schedule

## ANNEXURE 1

### Glossary

**Criterion-referenced assessment** – Criterion-referenced assessments measure how well a student performs against a standard or criterion rather than another student.

**Authentic assessment** – Authentic assessment refers to assessment aims to assess knowledge, skills, values and attitudes in contexts that closely resemble actual situations in which those knowledge, skills, values and attitudes are used.

**Assessment Forms** – The most appropriate means of assessing and determining how well learners are learning

**Assessment Standard** – Describes the minimum level at which learners should demonstrate the achievement of a Learning Outcome and the ways or range (breadth and depth) of demonstrating the achievement. It is grade-specific.

**Assessment Strategies** – The approaches taken to assess a learner's performance that use a number of assessment forms appropriate to the task and level of the learners' understanding.

**Assessment Task** – This is an assessment activity that is designed to assess a range of skills and competencies. For example, 1 task is: an assignment' a test, an exam which may include 1, 2 or 3 papers

**Common Tasks for assessment** – A series of tasks that is intended to obtain information about a learner's demonstrated achievement. These tasks must cover a range of assessment activities e.g. practical/project/classroom/homework/oral/presentations/paper and pencil tests/etc.

**Continuous assessment** – An ongoing process that measures a learner's achievement during the course of a grade or level, providing information that is used to support a learner's development and enable improvements to be made in the learning and teaching process.

**External assessment** – Any assessment activity, instrument or programme where the design, development and implementation has been initiated, directed and, coordinated by Provincial Education Departments and the Department of Education either collectively or individually

**Moderation** – The process of verifying results of continuous assessment and the external assessment

**Pen-and-paper task** – A task written under controlled conditions that requires a written response and measures a learner's understanding and performance across a range of competencies.

**Performance-based task** – This type of assessment emphasises the learner's ability to use their knowledge and skills to produce their work. It requires demonstration of a skill or proficiency by asking the learners to create , produce or do something often a setting that involves real world applications,

**Programme of assessment** – A yearlong grade-specific formal plan of assessment for a Learning Programme/ Learning Area/ Subject.

**Record Sheet** – Record of learner performance in formally assessed tasks expressed as national codes, marks and/or percentages. May or may not include comments. The use of comments is essential in the Foundation Phase.

**Schedule** – Quarterly record of learner performance which is kept at the school. The end-of-year schedule is submitted to the district at the end of the year.

**School Assessment Plan** – A plan of assessment which includes the formal tasks for all Learning Programmes/Learning Areas/Subjects to be undertaken during the school year.

**Teacher Portfolio** – Collection of all planning for assessment, including the assessment tasks and assessment tools for both formal and informal assessment. It should include the record sheet(s).

## ANNEXURE 2

### Various Forms or Types of Assessment

The following section describes the various forms/types of assessment that could be used by the teachers to assess learning achievement. The different learning areas have identified a variety of these forms.

#### **Tests**

Tests could be used for summative or formative purposes. They usually consist of a range of questions. Learners are required to respond to questions within a specified time. Tests are usually used to assess the recall of information and cognitive skills such as problem solving or analyses etc. For a paper and pencil test, objective tests and essay tests could be used.

The objective tests could include multiple choice, matching, true or false, short answer, completion etc.

Alternative response questions

- True/False; Yes/No questions
- Possible uses:
  - ▶ Recall of information
  - ▶ Ability to discriminate

#### **Multiple-choice questions**

Multiple-choice questions consist of an incomplete statement or a question, followed by plausible alternative responses from which the learner has to select the correct one. Outcomes involving higher order analytical skills are probably more validly assessed by means of free-response assessment instruments such as extended response questions, but multiple choice questions can be useful if carefully constructed.

#### ***Possible uses:***

- Recall of information
- Check understanding; analyses

#### **Assertion/reason questions**

These questions consist of an assertion and supporting explanation. The learner has to decide whether the assertion and explanation are true, and if true, whether the explanation is a valid reason for the assertion. One possible use is to assess learners' ability to weigh up options and to discriminate.

#### **Essay response items**

These items require that learners a response that would be several sentences to several pages in length.

**Hints for the teacher**

The following suggestions would strengthen the construction of essay items:

- ▶ Construct the item to elicit the identified skills to be assessed. For example if the purpose is to assess reasoning the following item stems could be used; *Compare, indicate the cause and effect, Summarise, Generalise, Make inferences, Classify, Create, Apply, Analyse, Synthesize, Evaluate etc.*
- ▶ Write the item so that learners clearly understand the task i.e. avoid ambiguity. Another way to clarify to the learners the nature of the task is to indicate the scoring criteria. This indicates to the learners what you will be looking for when grading the answers.

Avoid giving learners options as to which essay questions they will respond to.

The following is a checklist for scoring essays:

- Is the answer outlined prior to testing learners
- Is the scoring method (i.e. whether it is holistic or analytical) appropriate?
- Is the role of writing mechanics clarified? i.e. it should be made clear to the learners whether they will be penalised for spelling errors, incorrect sentence structure etc.
- Are items scored one at a time?

**Performance-based assessment**

This type of assessment emphasises the learners' ability to use their knowledge and skills to produce their work. This includes presentations, research papers, investigation, projects, demonstrations, exhibitions, singing, athletics, speeches, musical presentations, etc.

Learners are required to demonstrate a skill or proficiency by asking the learners to create, produce or do something, often in a setting that involves real world applications. The educators should not only assess the end product but also the process that the learners used to complete the task.

When learners are required to complete a task, the description of a task should:

- Include outcomes to be assessed
- Include description of what the learners are required to do
- Indicate group or individual help that is allowed
- Indicate the resources needed
- Indicate the role of the teacher
- Indicate the administrative process
- Indicate the scoring procedure or the criteria that will be used to evaluate the final product

The following checklist could be used to evaluate the design of performance-based tasks

- Does the task include an integration of knowledge, skills and values?
- Does it address a variety of outcomes?
- Is the task based on real life context?
- Is the task do-able?
- Are multiple solutions possible?
- Is the nature of the task clear?
- Is the task challenging and stimulating to the learners?
- Are criteria for scoring included?

**Interviews**

An interview is probably the oldest and best-known means of eliciting information directly from learners. It combines two assessment methods, namely observation and questioning. An interview is a dialogue between the assessor and the learner, creating opportunities for learner questions.

**Possible uses:**

- A range of applications using different forms of questions, particularly open-ended questions

**Questionnaires**

A questionnaire is a structured written interview consisting of a set of questions relating to particular areas of performance. Unlike a personal interview, it is administered and judged under standard conditions.

**Possible uses:**

- Assessment of outcomes particularly concerned with attitudes, feelings, interests and experiences

**Structured questions**

A structured question consists of a stem (which describes a situation), followed by a series of related questions. The stem can be text, a diagram, a picture, a video, etc.

**Possible uses:**

- Recall of information
- Application of knowledge and understanding
- Analyses
- Debates
- Arguments

**Assignments**

Assignments are problem-solving exercises with clear guidelines and a specified length. More structured and less open-ended than projects, but they do not necessarily involve strict adherence to a prescribed procedure and they are not concerned exclusively with manual skills.

**Possible uses:**

- Problem-solving around a particular topic.

**Case studies**

A case study is a description of an event concerning a real-life or simulated situation, usually in the form of a paragraph or text, a video (description of the picture for the blind/captions for the deaf), a picture or a role-play exercise. This is followed by a series of instructions to elicit responses from learners. Individuals or small groups may undertake case studies.

**Possible uses:**

- Analyses of situations
- Drawing conclusions
- Reports on possible courses of action

**Practical exercises/demonstrations**

This is an activity that allows learners to demonstrate manual and/or behavioural skills. The assessment may be based on the end-result of the activity (the product), or the carrying-out of the activity (the process), or a combination of both.



**Possible uses:**

- Demonstration of skill

**Project**

A project is any exercise or investigation in which the time constraints are more relaxed.

Projects are:

- Practical
- Comprehensive and open-ended
- Tackled without close supervision, but with assessor guidance and support
- Projects can involve individuals or a group of learners. The assessor directs the choice of the project, usually by providing the learner with a topic or brief for the investigation.

**Possible uses:**

- Comprehensive range of skills can be assessed
- Integration of activities

**Role-plays**

Learners are presented with a situation, often a problem or an incident, to which they have to respond by assuming a particular role. The enactment may be unrehearsed, or the learner may be briefed in the particular role to be played. Such assessments are open-ended and are person-centred.

**Possible uses:**

- Assessment of a wide range of behavioural and inter-personal skills

**Simulations**

Simulations mirror actual activities or conditions. They are suitable for assessments where demonstrations and observation will provide reliable and valid results, but where, for a number of reasons, it is difficult or not practicable to assess under actual conditions.

**Possible uses:**

- Assessments of actions under 'safe' conditions, e.g. operating machines which could be dangerous or where the breakdown of such a machine will cause a halt in production or endanger lives.

**Aural/Oral Questions**

These are mainly used to generate evidence on learners' ability to listen/sign, interpret, communicate ideas and sustain a conversation in the language of assessment. Oral questions include oral examinations, interviews, conferences and other conversations in which information is obtained about student's learning.

Oral questions can be used to assess:

- Interpretation of ideas
- Expression of ideas
- Completion questions/short answer questions
- Accommodations for the Deaf, Blind, LD, etc.

**Observations**

This is the type of assessment that is commonly used by the teachers without consciously thinking about it. The teachers constantly observe learners informally to assess their understanding and progress. Teachers watch learners as they respond to questions or as they study. The teacher listens to them as they speak and discuss with others. Observation is also used extensively in performance based assessment and other formal techniques.

**Self-report assessment**

In self assessment learners could be asked to complete a form or answer questions to reveal how they think about themselves, or how they rate themselves. Attitude surveys, socio-metric devices, self-concept questionnaire, interest inventory are some of the examples that are used in self-report assessment.

The teacher's choice of methods/technique depends highly on what is to be assessed. The following are some of the forms of assessment:

- Project work
- Collage
- Tests
- Research project
- Assignment
- Investigation
- Survey
- Debate/argument
- Role-play
- Interview
- Drama
- Presentation
- Panel discussion
- Practical demonstration
- Construction
- Music/songs
- Poetry/Rhymes
- Story telling
- Model making/plans/designs
- Brainstorming/Mind mapping
- Game design
- Physical activities
- Maps
- Posters
- Charts
- Tables
- Written presentation e.g. reports, essays
- Oral presentation
- Worksheets
- Questionnaires
- Cassettes
- Exhibitions
- Self-reporting and answers by learners
- Conferencing
- Drawings/graphs
- Sculpture/paintings

## ANNEXURE 3

### Glossary

**Balance Sheet** – A statement which reflects the financial position of a business (assets, liabilities and equity) on a certain date

**Capital (*machines*)** – Means/tools/machines used by people to manufacture goods and services. They are not meant for human consumption.

**Current Assets** – Those assets that can be converted into cash within the next accounting period e.g. stock, debtors etc.

**Economic growth** – It is the relationship between input (all what is necessary to produce goods and services i.e. labour, natural resources, materials and capital) and output (the number of finished goods and services produced)

**Efficiency** – Doing things in the right way (working correctly, within time and without waste. Working to standard rate)

**Effectiveness** – Doing the right thing. Producing exactly what the customer needs

**Fixed Assets** – Assets that are tangible or fixed in nature. These assets form the infrastructure of the business, and enable it to operate e.g. property, equipment, land and buildings

**Gross profit** – The total mark-up on all goods sold in a business throughout a certain period

**High productivity** – Is when a high level of output is obtained from little input. This implies that it is cheap to produce goods and services, which in turn can be affordable by everybody. It generates economic growth in a country.

**Income Statement** – A statement which reflects the result of the activities or operations of a business for a certain period of time

**Input** – Whatever is needed to produce goods and services

**Labour** – This is the mental and physical effort of people involved in the production. Wages and salaries are a compensation/reward for labour.

**Liabilities** – Those debts incurred by the business and are still to be paid

**Low productivity** – Is when large inputs produce only a small quantity of goods and services? This implies that it is very expensive to produce goods and services and this results in high prices.

**Market/customer** – At whom the goods or services are aimed. People who buy goods and services produced

**Multinationals** – Businesses that are operating internationally e.g. McDonalds, KFC, BMW etc.

**Net profit** – The final profit earned by a business after deducting all expenses for a certain period

**Organised labour/Trade unions** – Workers organise themselves into labour unions, which in turn protect them from unfair labour practices, negotiate salary increases etc

**Output** – The results of the production process. Goods and services produced when the factors of production or resources are combined

**Production** – The process of combining resources/input to produce goods and services

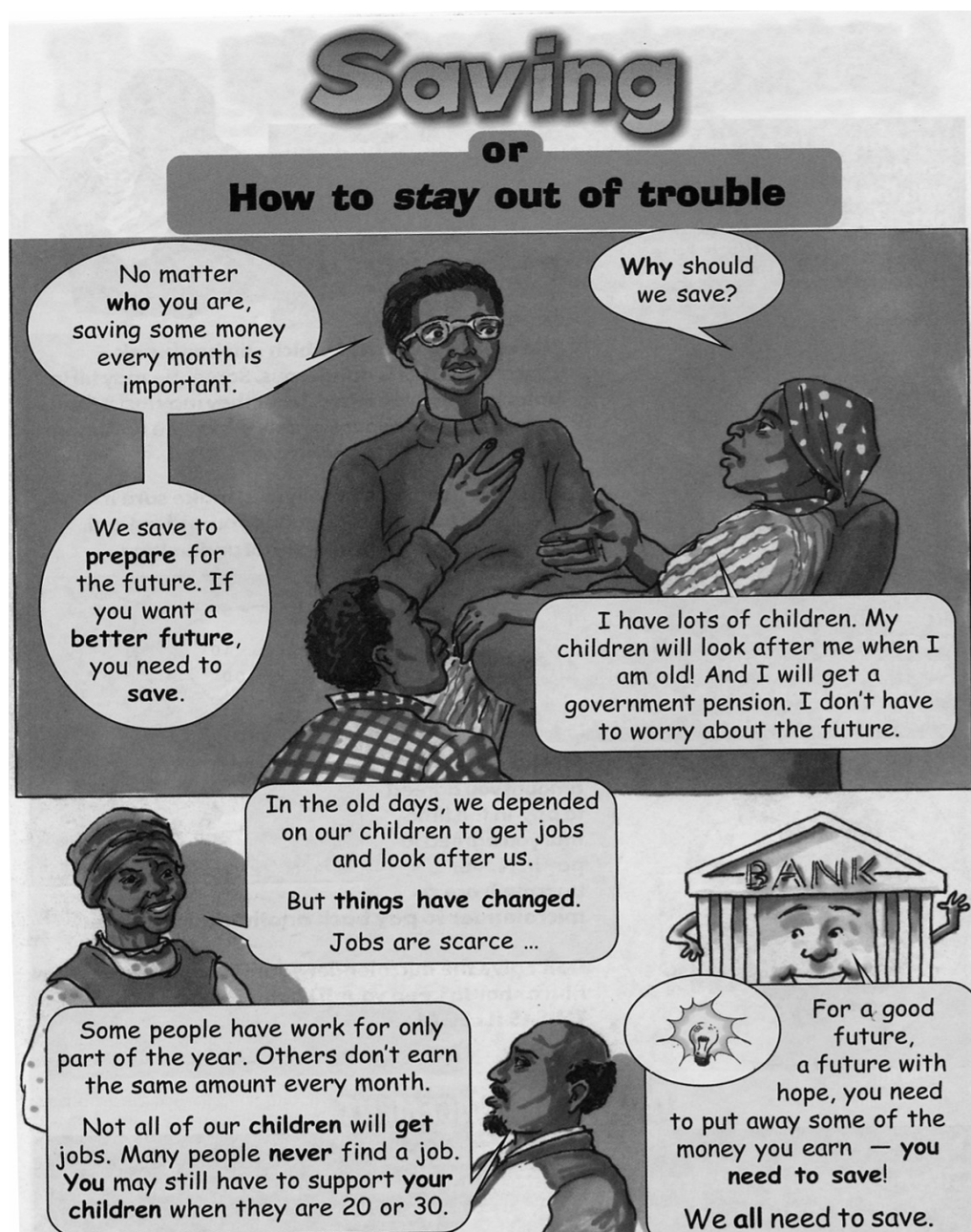
**Productivity** – Means completing a task/or producing goods and services efficiently and effectively with optimum utilisation of resources (human, capital and physical) continuously

**Quality** – A certain standard set/required for goods produced or services rendered

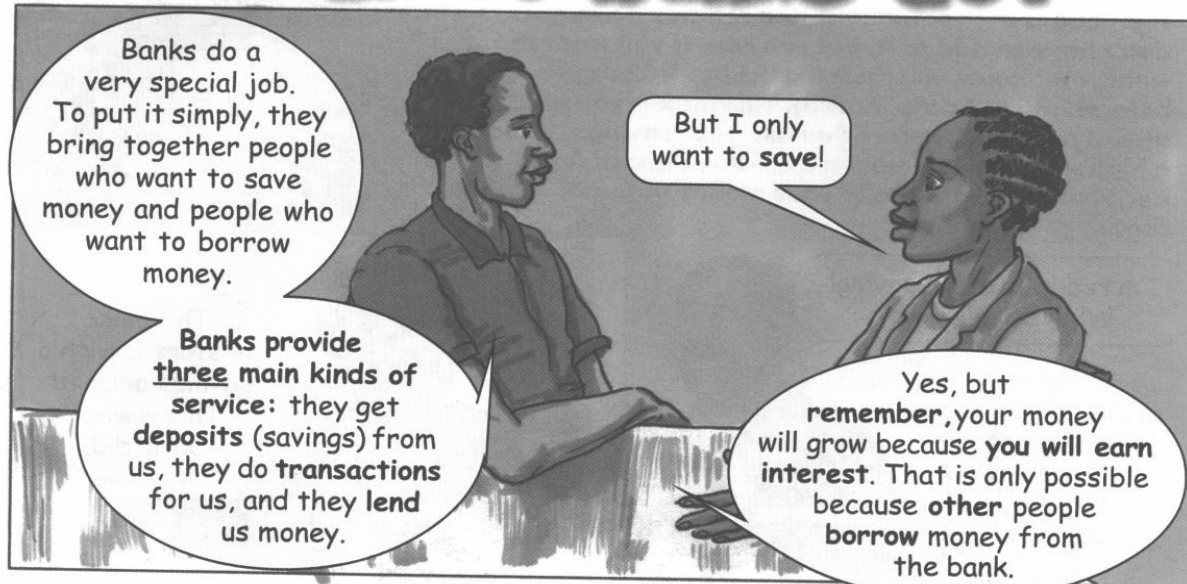
**Quantity** – The amount of goods and services produced

## ANNEXURE 4

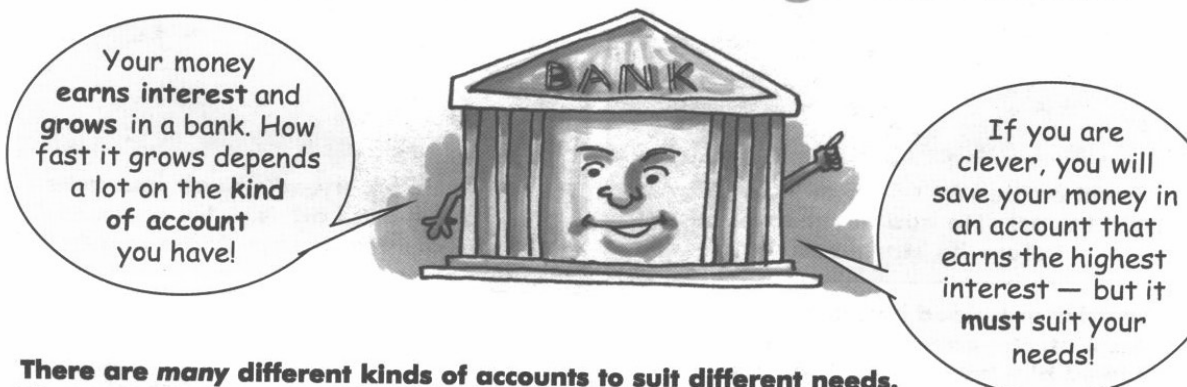
## Extracts from Financial Services Consumer Education: Plan your financial future



# What do banks do?



## Different kinds of savings accounts



**There are many different kinds of accounts to suit different needs. These are the two you are likely to use if you are starting to save, but be sure you understand the costs involved.**

### Savings Account

Savings Accounts are simple and easy to manage. You can put money into your account or withdraw it (take it out) whenever you like. If you use an ATM (Automatic Teller Machine) the bank doesn't even have to be open. Banks are all slightly different, but you will need a small amount to open the account and you must keep a minimum amount in it. Check this with the customer adviser at the bank you choose. A Savings Account earns interest — how much this will be depends on your balance. (See page 30 to find out more about interest.)

## An example of a Report Card for the Intermediate Phase

Explanation of National Codes			
1	2	3	4
Not Achieved	Partially Achieved	Satisfactory Achievement	Outstanding/Excellent Achievement
1–34	35–49	50–69	70–100

Learning Areas	Result	Comments
English – Home Language		
Afrikaans – First Additional Language		
Sesotho – Second Additional Language		
Technology		
Natural Sciences		
Technology		
Life Orientation		
Economic and Management Sciences		
Social Sciences		
Arts and Culture		

Signature	Date	Comments	School stamp
Principal			
Teacher			
Parent			

## ANNEXURE 5

An example of a Learning Area recording sheet																
Learning Area: _____ Grade: ____ Class: ____																
Date of recording																
Learning Outcome(s)																
	Learner's result												Comments	Final rating		
Name of learner																
1																
2																
3																
4																
5																
6																
7																
8																
9																
10																
11																
12																
13																
14																
15																

Level 1 = 1–34%; Level 2 = 35–49%; Level 3 = 50–69%; Level 4 = 70–100%



## ANNEXURE 6

[illegible]

Date: .....

Number placed in next grade: .....

**Certified correct:**

Date: .....

**Approved:**

Date: .....

## ANNEXURE 7

An example of a Grade 9 Work Schedule – Economic and Management Sciences										
Term 1										
Weeks	1	2	3	4	5	6	7	8	9	10
<b>LOs and ASs</b>		9.4.1 9.4.3 9.4.2		9.4.2		9.1.5 9.2.1		9.3.2 9.4.4	9.3.6 9.2.3	
<b>Context</b>	Entrepreneurial Knowledge and skills			Entrepreneurial Knowledge and skills		National Budget SA – national budget		Business and Organisations Marketing	Sole Trader Forms of credit purchases Different means of payments The advantages of cash purchases Sustainable growth/ context of the learners/community banking environment	
<b>Content</b>	<b>9.4.1</b> SWOT analysis Business ideas to meet the need for manufactured or service goods <b>9.4.3</b> Forms of ownership Characteristics of different forms of ownership Advantages and disadvantages Choosing a suitable form of ownership			<b>9.4.2</b> Generating ideas for business opportunities Distinguish between manufacturing, service or tourism enterprises Budgeting Business Plans Develop business plan from the best idea		<b>9.1.5</b> Effect of national budget on the economy, Rights and responsibilities, government collection and expenditure <b>9.2.1</b> Regional and international agreements Economic growth and development policy of South Africa		<b>9.3.2</b> Concepts: Public relations, Social responsibility, Environmental responsibility; Different types of businesses and organisations; Steps taken by businesses to ensure good public relations; Strategies and actions of businesses towards social and environmental responsibility; <b>9.4.4</b> Design a questionnaire; Conduct the interview; Collect information; Analyse information; Types of advertising media; Developing the marketing campaign	Differentiate between the forms of credit purchase The use of the credit card Cost of using credit cards Explain and assess the use of different means of payment in the economy Advantages of cash purchases Concepts of savings Concept of investment Concept of economic growth Concept of prosperity Relationships of savings and economic growth Effects of savings and investments on economic growth	

Weeks	1	2	3	4	5	6	7	8	9	10
<b>Resources</b>	Textbooks Internet Resource material Financial magazines			Textbooks Internet Resource material Financial magazines		Textbooks Internet Bank Pamphlets Standard Bank financial literacy program Newspapers, Budget speeches National Treasury website Television			Textbooks Bank pamphlets/Internet Other resource material	
<b>Teaching and learning activities</b>										
<b>Assessment Task(s)/ Class work</b>	Class test									
<b>Formal Assessment</b>				Assessment Task 1: <b>Activity 1 – Business Plan</b>		Assessment Task 1: <b>Activity 2 – Case Study</b>		Assessment Task 1: <b>Activity 3 – Simulation</b>		
<b>Term 2</b>										
Weeks	1	2	3	4	5	6	7	8	9	10
<b>LOs and ASs</b>	9.3.1			9.3.1 9.3.3 9.3.4		9.3.1 9.3.3 9.3.4		9.3.1 9.3.3 9.3.4 9.3.5	<b>June Examinations</b>	
<b>Context</b>	Service/Retail Business – Sole Trader			Basic income statement and balance sheet for a service and retail business Cash and credit transactions in the books of service and retail businesses Posting to the general ledger	Basic income statement and balance sheet for a service and retail business Cash and credit transactions in the books of service and retail businesses Posting to the general ledger	Basic income statement and balance sheet for a service and retail business Cash and credit transactions in the books of service and retail businesses Posting to the general ledger		Basic income statement and balance sheet for a service and retail business Cash and credit transactions in the books of service and retail businesses Posting to the general ledger		

## ANNEXURE 7 (continued)

An example of a Grade 9 Work Schedule – Economic and Management Sciences									
Term 2									
Weeks	1	2	3	4	5	6	7	8	9
LOs and ASs	9.3.1			9.3.1 9.3.3 9.3.4	9.3.1 9.3.3 9.3.4	9.3.1 9.3.3 9.3.4 9.3.5			June Examinations
Context			Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	Drawing up trial balance Keyboard skills and function keys in developing, storing, retrieving and editing business documentation	
Content	9.3.1 Format of Income Statement and Balance Sheet Concepts: Sales Cost of sales Gross Profit Operating income Operating expenses Net profit Liability Equity - Capital + Net Profit - Drawings Fixed (Tangible) Assets Fixed Deposit Current Asset Inventory Debtors Cash and cash equivalents Drawings Loans		Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %	Service/Retail business – Sole trader and concepts Cash, Credit, CRJ, CPJ, DJ, CJ, Analysis of receipts, Bank, Sales, Cost of sales, Debtors Control, Creditors Control, Source documents, Income, Expenses, Assets, Owners' Equity Accounting Equation Entering transaction into CRJ and CPJ Double entry principle Posting to the general ledger Balancing and totaling of accounts Drawing up of trial balance Parts of computer Switching computer on and off Opening a document on Ms word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents Ratio's: gross profit %, net profit %

Weeks	1	2	3	4	5	6	7	8	9	10
<b>LOs and ASs</b>	9.3.1		9.3.1 9.3.3 9.3.4	9.3.1 9.3.3 9.3.4	9.3.1 9.3.3 9.3.4		9.3.1 9.3.3 9.3.4 9.3.5		<b>June Examinations</b>	
<b>Content</b>	Current Liabilities Creditors Bank Overdraft Short term loans		Parts of computer Switching computer on and off Opening a document on MS Word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents	Parts of computer Switching computer on and off Opening a document on MS Word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents	Parts of computer Switching computer on and off Opening a document on MS Word Use of keyboard Home Keys Storing of documents Retrieving of documents Editing of documents		Current ration, Acid test ratio Return on owners' equity Comment and decision taking			
<b>Resources</b>	Textbooks Internet Templates of financial statements		Textbooks Templates: CRJ, CPI, DJ and trial balance Ledger eight column journals Computer discs/flash discs Rewritable CD	Textbooks Templates: CRJ, CPI, DJ and trial balance Ledger eight column journals Computer discs/flash discs Rewritable CD			Textbooks Templates: CRJ, CPI, DJ and trial balance Ledger eight column journals Computer discs/flash discs Rewritable CD Case studies			
<b>Teaching and learning activities</b>										
<b>Assessment Task(s)/ Class work</b>			Accounting class work exercises		Accounting case studies					
<b>Formal Assessment</b>					<u>Assessment Task 2</u> Including June test examination <b>Activity 1 – Financial Statements</b> <b>Activity 2 – Subsidiary Journals</b> <b>Activity 3 – General Ledger and Trial Balance</b>				<b>June Control Test/Exam</b>	

## ANNEXURE 7 (continued)

An example of a Grade 9 Work Schedule – Economic and Management Sciences									
Term 3									
Weeks	1	2	3	4	5	6	7	8	9
LOs and ASs	9.2.3 9.2.4								
Context	Sustainable Growth SA Economic environment and global environments			9.1.1 9.1.2 9.1.3	9.1.3 9.2.2 9.4.5	9.1.4 9.3.7 9.2.2			School Assessment weeks
Content	<p>9.2.3 Concepts of savings, investment, economic growth, prosperity; Relationship of savings and economic growth; Effects of savings and investments on economic growth;</p> <p>9.2.4 Concept of productivity, globalisation, economic growth; Strategies to improve economic growth; Productivity and its effects on economic growth and global competition; Effects on globalisation on SA economy</p>	<p>9.1.1 Flow of money from the consumer to the economy; The role of financial institutions in the flow of money; Need for savings and investments; Factors of production and their rewards; The benefits of economic development to a country; Productivity;</p> <p>9.1.2 Foreign markets; Reasons for foreign exchange; Advantages and disadvantages; Benefits for the economy</p>	<p>9.1.3 Graphs, Tables, Equilibrium prices Petrol price – causes of changes Changes in demand and supply Impact on the economy</p> <p>9.2.2 The concept of RDP The reasons for RDP The role of RDP in the economy Differentiating shortcomings from strengths of RDP</p> <p>9.4.5 Small, medium and micro enterprises play in the process of wealth and job creation</p>	<p>9.1.4 Role of trade unions; Reasons for formation; Regulations and rights; Rights and responsibilities of workers; Effect on the economy; Effect on labour issues; Role in the transformation;</p> <p>9.3.7 Researches laws affecting basic conditions of employment; Non-discrimination in the workplace</p> <p>9.2.2 The concept of RDP; The reasons for RDP; The role of RDP in the economy; Differentiating shortcomings from strengths of RDP</p>					

Weeks		3	4	5	6	7	8	9	10	
		9.1.3 Graphs; Tables; Equilibrium prices; Petrol price – causes of changes; Changes in demand and supply; Impact on the economy								
Resources	Textbooks Bank pamphlets Newspaper Internet	Textbook Internet Bank Pamphlets on Bank literacy Marketing journals International pamphlets Case studies Statistics Economic reports		Textbooks Statistics Case studies Financial magazines		Labour relations act Case studies Textbooks Constitution Newspaper articles Posters Trade union publications Case studies Financial reports				
Teaching and learning activities								School Assessment		
Assessment Task(s)/ Class work						Case Studies Newspaper articles				
Formal Assessment	Assessment Task 3: Activity 1: discussion	Assessment Task 3: Activity 2: Presentation	Assessment Task 3: Activity 3: Project	Assessment Task 3: Activity 3: Test						
Term 4										
Weeks	1	2	3	4	5	6	7	8	9	10
LOs and ASs	CTA		CTA	CTA	CTA	CTA	CTA	CTA	Progression and Promotion	
Context										
Content										
Resources										

