

COVER PAGE	
Learner Name and Surname	
Learner ID	
Mine Sponsoring your training	
Company	
Date	
Learner Signature	

 PHAKAMANI LEARNING ACADEMY	<u>LEARNER WORKBOOK</u>
	<u>BUSINESS ACCELERATOR PROGRAMME:</u> <u>ALL MODULES</u>

IMPORTANT INFORMATION:

Please use only this workbook to compile your POE.

If you need to insert pages' number the page as a letter corresponding to the page number (for example I insert a page after page 20 – I number the page 20-a, then two pages after page 45 I number it 45-a & 45-b)

Sign all the documents in this workbook

When completing the Formative and Summative Assessments – USE YOUR OWN WORDS AND DO NOT COPY STRAIGHT OUT OF THE LEARNER GUIDE!!!

Plagiarism (using someone's else's work as your own or writing straight from the Learner guide) is an offence and if you commit plagiarism you will be found not yet competent!!

Your file cover must have the following:

NAME

SURNAME

SKILLS PROGRAMME NAME

STUDY SCHOOL NUMBER

ID NUMBER

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PART 1: DOCUMENTATION

LEARNER REGISTRATION FORM													
PERSONAL AND CONTACT DETAILS													
	FIELD	DESCRIPTION	INFORMATION										
1	SURNAME	AS PER YOUR ID DOCUMENT											
2	FULL NAMES	AS PER YOUR ID DOCUMENT											
3	TITLE	MS/MRS/MR/PROF/DOC											
4	RSA ID NUMBER	IF NOT COMPLETE BELOW											
5	ALTERNATIVE ID	ONLY COMPLETE IF NO RSA ID AVAILABLE. INDICATE TYPE OF ALTERNATIVE ID											
6	DATE OF BIRTH	YYYY/MM/DD											
7	GENDER	Male – M, Female – F, Other – O											
8	ETHNICITY	Black African – BA, Black Indian Asian – BI, Black Coloured – BC, White – W, Other – O (specify)											
9	SOCIO ECONOMIC STATUS	Employed, unemployed, student											
10	DISABILITY STATUS	None, hearing / sight / speech / movement, other (specify)											
11	GEOGRAPHIC LOCATION	List geographic area that you live in, i.e. Gauteng, Kwa Zulu Natal, Eastern Cape, Western Cape, Northern Cape, Limpopo, Polokwane, Free State, North West, Mpumalanga, Northern Province, Outside SA											
12	PHYSICAL ADDRESS												
13	POSTAL ADDRESS												
14	HOME NUMBER												
15	CELL NUMBER												

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16	EMAIL	
EDUCATIONAL DETAILS		
17	HIGHEST EDUCATION	
18	CURRENT OCCUPATION	
19	EXPERIENCE	
20	YEARS IN OCCUPATION	

NB THE FOLLOWING NEEDS TO BE INSERTED AFTER THIS FORM:

DOCUMENT	NUMBER AS FOLLOWS:
COPY OF CV	3-A
COPY OF MATRIC CERTIFICATE OR LATEST REPORT FROM SCHOOL	3-B
COPY OF ID OR PASSPORT	3-C
OTHER RELATED CERTIFICATES	3-C

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ASSESSMENT PREPARATION FORM			
Name of Candidate		Date	
		Time	
Name of Assessor		Venue	
HOW TO PREPARE THE CANDIDATE	DOCUMENT REQUIREMENTS	AGREE (TICK)	ACTION REQUIRED
Explain to the candidate why you are meeting and the purpose of the assessment.	NQF Framework Assessment process		
Discuss the assessment plan in detail.	Assessment strategy		
Explain assessment process, show assessment instruments to candidate and describe assessment conditions.	Assessment instruments		
Identify the role-players during assessment.	Assessors Moderator		
Describe the evidence required to be declared competent.	Examples of evidence		
Explain how evidence will be judged.			
Explain to the candidate how to prepare: Give candidate summative task description.	Summative task description		
Confirm with the candidate what he/she should bring to the assessment.	Detailed briefing on exact requirements to be given to candidate		
Ensure that candidate understands the procedures of all assessment practices.	Appeals procedure Moderation procedure Assessment policy		
Ask the candidate if he/she foresees any problems or identify any special needs.	List needs		
Check with candidate that he/she clearly understands the assessment procedure.			
Comments or questions:			

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ASSESSOR DECLARATION

I hereby declare that I have prepared the candidate for assessment, the candidate was consulted and all stakeholders have been informed and the workplace is prepared to ensure valid and fair assessment.

ASSESSOR NAME

SIGNATURE

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INTERVIEW: RPL PROCESS

The purpose of the interview is two-fold:

- ✓ A type of self-assessment for the candidate. It should assist the assessor in deciding the approach towards assessment in terms of making competence decisions where candidates are successful in proving their prior learning.
- ✓ To determine candidate preparedness for prior learning conducted and sensitize candidates to re-assessment.

QUESTIONS

Have you attended any short courses / courses that amount to prior learning before the start of the learnership / qualification? *(Note that it should be relevant to the qualification against which RPL is being conducted)*

Did you attend all modules of the learnership / qualification training?

How were you prepared for assessments?

How were assessments conducted?

Did an accredited training provider conduct the course/s?

Did you attend classroom training during the course?

What work experience do you have to prove competence against a unit standard/s for RPL purposes? (State number of years' experience)

Do you have a relevant certificate from an approved institution?

Do you have samples of work or other forms of evidence that can prove your competence?

Do you have a Grade 12 (Matric) with English and Maths, or English only?

Any evidence of competence provided during the course of the above interview must be considered during the planning phase of re-assessment and when making a judgement on candidate competence.

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LETTER OF COMMITMENT FROM THE LEARNER

Dear Learner

You have requested to be assessed through our organisation. To ensure effective assessment, there needs to be a commitment from you, that you will attend training if required and submit evidence of workplace application as required by the assessor.

Declaration of commitment:

I undertake to fulfil all the requirements of the assessment practices as specified by the assessor and service provider.

ORGANISATION NAME	LEARNER NAMES	DATE	SIGNATURE



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LEARNER DECLARATION OF AUTHENTICITY AND FULL DECLARATIONS REQUIRED FOR SPONSORED TRAINING													
STUDY SCHOOL													
FULL NAMES													
SURNAME													
ID NUMBER													
<p>I, full names stated (above) with ID number stated (above) hereby declare and state the following;</p> <ol style="list-style-type: none"> All documentation provided by myself including my ID, matric certificate, CIPC documents (where applicable), copy of highest qualification or school report and any other such document which pertains to this Portfolio of evidence is both true and correct and a true copy of the original. I am aware that plagiarism (the use of someone else's work without their permission and/or without acknowledging the original source) is wrong. I confirm that ALL the work submitted for assessment for the above course is my own unaided work except where I have explicitly indicated otherwise. I have followed the required conventions in referencing the thoughts and ideas of others. I understand that Phakamani Impact Capital may take disciplinary action against me if there is a belief that this is not my own unaided work or that I have failed to acknowledge the source of the ideas or words in my writing. I fully understand that the Business Accelerator Program is fully sponsored by the mining company _____ who has paid for the program. I do not and will not in any way whatsoever hold the mining company stated (above) responsible for my results and/or my failure to complete or be found competent on the program I am attending and its associated qualification. I am fully responsible for my Portfolio of evidence/s and it is up to me to complete the work properly with the aim to be found competent. Neither Phakamani Impact Capital, its affiliates and employees, its Directors and clients, or any other person or entity (whether private or public) is responsible for my work and my being found competent on any module. I have taken on the responsibility to complete this Portfolio of evidence and I bear full and complete responsibility for being deemed competent. 													
DATE		SIGNATURE LEARNER											
DATE		SIGNATURE WITNESS											
WITNESS NAME AND SURNAME													

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MODULE 1: SELF ASSESSMENT QUESTIONS

SELF ASSESSMENT		UNIT STANDARD 119674	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
Explain the importance of working capital to a small business venture. Highlight the consequences of lack of working capital.			
QUESTION 2			
What type of financing is a bond?			
QUESTION 3			
Write, in brief, any two points of difference between fixed capital and working capital			
WORKING CAPITAL		FIXED CAPITAL	
QUESTION 4			
Collect your own bank statement from the bank and interpret it in simple terms			
INSERT AS PAGE 9A			
QUESTION 5			

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Explain the importance of monitoring and maintenance of an accounting system

QUESTION 6

Explain why are financial statements important in business?

QUESTION 7

Compare the income statement of Keys Company and Kelly Fast Food and determine which company is financially viable – SEE LEARNER GUIDE (which company has more profit?)

QUESTION 8

Identify 3 Fixed Assets that you would have if you were running a small bakery in your neighbourhood

1

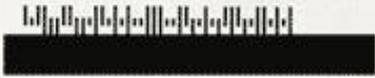
2

3



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contact tel 08457 60 60 60
see reverse for call times
text phone 08457 125 563
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www.hsbc.co.uk



Account Summary

Opening Balance	334.13
Payments In	11,562.99
Payments Out	9,233.37
Closing Balance	2,663.75

17 November to 16 December

International Bank Account Number

Branch Identifier Code

Sortcode Account Number Sheet Number

Your Business Current Account details

Date	Payment type and details	Paid out	Paid in	Balance
16 Nov	BALANCE BROUGHT FORWARD			334.13
17 Nov	CR PAYPAL TRANSFER		468.29 ✓	
	CR MDIR 3263795NOV14		168.61 ✓	
	CR MDIR 3263795NOV13		249.88 ✓	
	DD YELL LTD	107.32 ✓		1,113.59
18 Nov	CR MDIR 3263795NOV16		213.54 ✓	1,327.13
19 Nov	CR MDIR 3263795NOV17		683.61 ✓	
	TFR 403216 81656163			
	INTERNET TRANSFER	416.56 ✓		
	SWT VIKING DIRECT LTD			
	LEICESTER	66.93 ✓		1,527.25
22 Nov	CR PAYPAL TRANSFER		250.00 ✓	

1.

2.

3.

4.

5.

QUESTION 3

SO 1

AC 4

Define the following terms:

1. Start-up Capital

(2)



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II.	Working Capital	(2)
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QUESTION 4	SO 2, AC 4, SO 4, AC 1, AC2, AC 3
-------------------	--

Below is an Income and Expenditure statement for AA cc.
 Analyse the elements of the income and expenditure statement and ascertain the profit or loss.
 Tips: What is this kind of statement? How much income was received? What was income received for? What are the expenses? Was there a profit? How much was the profit?[10 marks]

Income		
Rental		100 000
Expenditure		
Bond repayment on house		30 000
Travelling		20 000
Advertising		5 000
Water & Lights	2 000	
Telephone	5 000	
Renovations	4 000	
Funds remaining		?

ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:**BAP MODULE 1 – FORMATIVE ASSESSMENTS****CANDIDATE'S NAME:**

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER "MET REQUIREMENTS" (C FOR COMPETENT) OR "DID NOT MEET REQUIREMENTS" (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS**MANAGE FINANCES FOR A NEW VENTURE****OVERALL OUTCOME:**

THE LEARNER MUST BE ABLE TO MANAGE FINANCES OF A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: EXPLAIN FINANCIAL CONTROLS FOR MANAGING A BUSINESS

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	The necessity of banking and banking accounts are discussed with examples of the consequences of not having them.			
AC 2	Skills for interpreting bank statements and operating banking accounts are explained with examples			
AC 3	The various types of accounts are identified and explained in relation to own business venture.			
AC 4	Financial concepts and principles are related to own business venture.			

SPECIFIC OUTCOME 2: IDENTIFY AND APPLY ACCOUNTING PRACTICES AND PROCEDURES

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Accounting systems are explained with reference to own venture.			
AC 2	Suitable accounting support structures are identified in accordance with own business requirements.			



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AC 3	Taxation requirements required in the administration of finances are explained in relation to own venture and controls for managing these requirements are identified to ensure that legislative regulations are adhered to.			
AC 4	The elements of an income and expenditure statement are analysed in relation to own business venture.			
AC 5	The elements of a cash flow statement are explained in relation to own business venture.			
AC 6	Payment terms and procedures relating to liabilities are identified and implemented accordingly.			

SPECIFIC OUTCOME 3: MANAGE BUSINESS ACCOUNTS AND MAINTAIN BUSINESS RECORDS

SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	Books of account are identified for interpretation purposes.			
AC 2	All records pertaining to all financial and related transactions are kept and stored for input into books of account.			
AC 3	Key issues pertaining to books of accounts are discussed and explained in relation to own business venture.			
AC 4	Books of accounts are kept on a monthly basis to ensure effective financial management of business venture.			

SPECIFIC OUTCOME 4: UTILISE FINANCIAL STATEMENTS TO IDENTIFY BUSINESS PROGRESS

SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	The elements of an income and expenditure statement are analysed in relation to own business venture.			
AC 2	Income and expenditure statement is compared to cash flow statement.			
AC 3	Profit/loss is ascertained accordingly to determine financial progress of business.			
AC 4	Financial records are compared to business plans to determine whether business objectives are being met, and problem areas are rectified accordingly.			

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OVERALL ASSESSMENT DECISION**ASSESSORS COMMENTS:**

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MODULE 1: SUMMATIVE ASSESSMENT

SUMMATIVE ASSESSMENT		UNIT STANDARD 119674	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS			
QUESTION 1	SO 2	AC 2	
Which of the following are examples of accounting support structures in a new venture (circle the correct answer/s)			(1)
A.	Double entry bookkeeping system		
B.	Invoices and cheque butts		
C.	Accounting clerks		
D.	Cask boxes		
E.	Mentors		
QUESTION 2	SO 2	AC 3	
Match definitions in column 1-3 to the different forms of taxes shown in column A-C			(3)
1.	Indirect tax based on consumption of goods and services in the economy.	A	Income tax
2.	Tax levied on gross income of an employee	B	Value added tax
3.	Tax charged against the profit of the company	C	PAYE
1 =			
2 =			
3 =			
QUESTION 3	SO 2	AC 1	
State whether the following statement is true or false (CIRCLE THE CORRECT ANSWER)			
An accounting system is comprised of accounting records (cheque books, journals, ledgers, trial balances, and financial reports) and a series of processes and procedures in order for accounting transactions to be accurate			(1)
TRUE		FALSE	
QUESTION 4	SO 1	AC 1	
Which of the following are is a type of a bank? (circle the correct answer)			(1)

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Task 2	SO 2	AC 5
Draw a projected cashflow statement for the venture (as per in the instructions above – if you don't have company or are not opening one up currently then make up the name of the company and the figures) for the next 2 months. Ensure that the key elements of the cashflow statement are shown. We have completed part of it to assist you.		(10)
DESCRIPTION	MONTH 1	MONTH 2
STARTING CASH		
CASH IN		
TOTAL CASH IN		
CASH OUT		
TOTAL CASH OUT		
ENDING CASH		
CHANGE IN FLOW		
TASK 3	SO 4	AC 1, AC 2, AC 3, AC 4
You are required to carry out a research on the differences and similarities of cash flow statements and income & expenditure statements. The results must be presented in a research report which must have introduction, findings (differences & similarities) and conclusion.		(10)
RESEARCH REPORT TITLE:		
COMPILED BY:		
DATE:		

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TASK 4			
Develop a system that you will use in the venture to keep and store financial and related transactions. We have added in some headings to assist you.			(10)
BANK STATEMENTS:			
RECEIPT BOOKS:			
PAYMENTS:			
INCOME AND EXPENDITURE STATEMENT:			
ACCOUNTS RECEIVABLE AND ACCOUNTS PAYABLE:			
TOTAL MARKS			/ 45
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:**BAP MODULE 1 – SUMMATIVE ASSESSMENTS****CANDIDATE'S NAME:**

ASSESSOR'S NAME:

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AC 3	Taxation requirements required in the administration of finances are explained in relation to own venture and controls for managing these requirements are identified to ensure that legislative regulations are adhered to.			
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OVERALL ASSESSMENT DECISION**ASSESSORS COMMENTS:**

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MODULE 2: SELF ASSESSMENT QUESTIONS

SELF ASSESSMENT		UNIT STANDARD 119712	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
What is a tender			
QUESTION 2			
State the stages in the tendering process.			
QUESTION 3			
Explain why should tender documents should be reviewed.			

QUESTION 4

Have you ever been involved in a tendering process as an individual or organisation? List tender requirements that you were supposed to meet. Were you able to comply with the requirements?

QUESTION 5

What is a schedule of quantities?

QUESTION 6

Explain the importance of submitting a tender within the time, manner and criteria specified in the tender document

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MODULE 2: SELF ASSESSMENT QUESTIONS

FORMATIVE ASSESSMENT		UNIT STANDARD 119712	
Method	Written: Self-reflection. Individual Task. Complete this part of the workbook with your facilitator.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS			
QUESTION 1	SO 1	AC 1, AC 2	
Define the following terms:			(10)
I.	Tender		
II.	Tender offer		
III.	Business		
IV.	Business plan		

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V.	Tender document		
QUESTION 2		SO 1	AC 2
I.	State what must be included in a tender document.		(4)
II.	State and explain the stages in the tendering process		(8)
QUESTION 3		SO 1, AC 3; SO 2, AC 1	
I.	What are some of the things your organisation must put into consideration when determining if it is viable to pursue tender in relation to business opportunities and risks		(8)

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QUESTION 4	SO 3	AC 3	
Explain the importance of submitting a tender within the time, manner and criteria specified in the tender document. Use examples to support your answer			(5)
TOTAL MARKS			/ 50
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 2 – FORMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER "MET REQUIREMENTS" (C FOR COMPETENT) OR "DID NOT MEET REQUIREMENTS" (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

TENDER FOR BUSINESS OR WORK IN A SELECTED NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO TENDER FOR BUSINESS OR WORK IN A SELECTED NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: PROCURE AND REVIEW A TENDER DOCUMENT

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	A tender work prospecting system is identified and set up within the context of the business plan			
AC 2	The process of procuring a tender document is followed			
AC 3	Tender documents are reviewed to determine if it is viable to pursue tender in relation to business opportunities and risks			
AC 4	Where relevant the prospect of pursuing tenders on a joint-contract basis with other small enterprises is determined in order to meet tender capacity and resource requirements			
AC 5	Where relevant, external sources and expertise are sought to assist in completing tender documents			

SPECIFIC OUTCOME 2: PREPARE AND COMPLETE A TENDER DOCUMENT

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Information is extracted from bidders meetings and tender documents			

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AC 2	The tender requirements are listed and the venture's ability to comply is determined			
AC 3	A work breakdown/product itemisation is performed			
AC 4	Allowable unit costs for all work activities/product items are calculated			
AC 5	Profit mark-ups are implemented to produce selling prices			
AC 6	The schedule of quantities/products/services are completed			

SPECIFIC OUTCOME 3: SUBMIT A TENDER DOCUMENT

SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	The tender completed tender document is checked to ensure compliance to criteria outlined in tender document			
AC 2	Information relating to tender submission is extracted from the tender documents			
AC 3	The tender is submitted within the time, manner and criteria stipulated in the tender document			

OVERALL ASSESSMENT DECISION

ASSESSORS COMMENTS:

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MODULE 2: SUMMATIVE ASSESSMENT

SUMMATIVE ASSESSMENT		UNIT STANDARD 119712	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS AND COMPLETE ALL TASKS (PRACTICAL)			
Many businesses find work by tendering or bidding for jobs. Winning the right tender is a major achievement that can help launch or grow a business. Both private and public sector organisations advertise tenders, inviting businesses to offer competitive proposals for supplying their products and services. You are required to procure and review tender documents and plan, prepare and deliver winning tenders by completing the following tasks			
TASK 1		SO 1, AC 1, AC 2, AC 3, AC 4, AC 5	
You are required to procure and review a tender document by completing the following tasks. You can seek external sources and expertise to assist in completing tender documents where necessary. (Note; attach all necessary evidence where necessary).			
I.	Identify and set up a tender work prospecting system within the context of the business plan	(8)	
INSERT AFTER THIS PAGE AND MARK IT PAGE 17A			
II.	Follow the tender document procurement process	(6)	
INSERT AFTER THIS PAGE AND MARK IT PAGE 17B			
III.	Review tender documents to determine if it is viable to pursue tender in relation to business opportunities and risks	(8)	
INSERT AFTER THIS PAGE AND MARK IT PAGE 17C			
IV	Determine the prospect of pursuing tenders on a joint-contract basis with other small enterprises in order to meet tender capacity and resource requirements	(6)	
INSERT AFTER THIS PAGE AND MARK IT PAGE 17D			
TASK 2		SO 2, AC 1, AC 2, AC 3, AC 4, AC 5, AC 6	
You are now required to prepare and complete a tender document. The following guidelines will assist you. You can use an old tender and create your own names and amounts.			
1.	Extract information from bidders meetings and tender documents	(6)	
2.	List tender requirements. Also determine the venture's ability to comply with these requirements	(8)	
3.	Perform a work breakdown/product itemization	(6)	
4.	Calculate allowable costs for all work activities/product items	(6)	
5.	Implement profit mark-ups to produce selling prices	(6)	

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6.	Complete the schedule of quantities/products/services	(6)
TASK 3		SO 3, AC 1, AC 2, AC 3, AC 4
<p>You are now required to submit a tender document. Note time management is very important in the tender process.</p> <p>You are required to demonstrate your ability to;</p> <p>a) Check the completed tender document to ensure compliance to criteria outlined in the tender document.</p> <p>b) Extract information relating to tender submission from the tender documents.</p> <p>Submit the tender within the time, manner and criteria stipulated in the tender document</p>		
Performance evaluation checklist (<i>Assessor use only</i>)		(6)
No:		C/NYC
1.	Ability to check the completed tender document to ensure compliance to criteria outlined in the tender document.	
2.	Ability to extract information relating to tender submission from the tender documents.	
3.	Ability to submit the tender within the time, manner and criteria stipulated in the tender document.	
4.	Presentation skills (is the document neat?)	
TOTAL MARKS		/ 66
Learner Signature		Date
Assessor Signature		Date
Moderator signature		Date
ASSESSMENT OUTCOME	COMPETENT	NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 2 – SUMMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER “MET REQUIREMENTS” (C FOR COMPETENT) OR “DID NOT MEET REQUIREMENTS” (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

TENDER FOR BUSINESS OR WORK IN A SELECTED NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO TENDER FOR BUSINESS OR WORK IN A SELECTED NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: PROCURE AND REVIEW A TENDER DOCUMENT

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	A tender work prospecting system is identified and set up within the context of the business plan			
AC 2	The process of procuring a tender document is followed			
AC 3	Tender documents are reviewed to determine if it is viable to pursue tender in relation to business opportunities and risks			
AC 4	Where relevant the prospect of pursuing tenders on a joint-contract basis with other small enterprises is determined in order to meet tender capacity and resource requirements			
AC 5	Where relevant, external sources and expertise are sought to assist in completing tender documents			

SPECIFIC OUTCOME 2: PREPARE AND COMPLETE A TENDER DOCUMENT

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Information is extracted from bidders meetings and tender documents			

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AC 2	The tender requirements are listed and the venture's ability to comply is determined			
AC 3	A work breakdown/product itemisation is performed			
AC 4	Allowable unit costs for all work activities/product items are calculated			
AC 5	Profit mark-ups are implemented to produce selling prices			
AC 6	The schedule of quantities/products/services are completed			

SPECIFIC OUTCOME 3: SUBMIT A TENDER DOCUMENT

SPECIFIC OUTCOME 3

C

NYC

COMMENTS

AC 1	The tender completed tender document is checked to ensure compliance to criteria outlined in tender document			
AC 2	Information relating to tender submission is extracted from the tender documents			
AC 3	The tender is submitted within the time, manner and criteria stipulated in the tender document			

OVERALL ASSESSMENT DECISION

ASSESSORS COMMENTS:

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MODULE 3: SELF ASSESSMENT QUESTIONS

SELF ASSESSMENT		UNIT STANDARD 119672	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
State and explain any two selling techniques that can be used to promote a product/service			
QUESTION 2			
Sometimes it is necessary to ask for help when compiling quotes. Discuss.			
QUESTION 3			
Explain some of the common pitfalls in quoting and order taking with examples in relation to own business venture			

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QUESTION 4

In your own words define the term negotiation

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MODULE 3: FORMATIVE ASSESSMENT

FORMATIVE ASSESSMENT		UNIT STANDARD 119672	
Method	Written: Self-reflection. Individual Task. Complete this part of the workbook with your facilitator.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS			
QUESTION 1	SO 1	AC 1	
Define the following terms:			(10)
I.	Marketing		
II.	Marketing concepts		
III.	Marketing plan		
IV.	Business plan		

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TOTAL MARKS			/ 50
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 3 – FORMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER “MET REQUIREMENTS” (C FOR COMPETENT) OR “DID NOT MEET REQUIREMENTS” (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

MANAGE MARKETING AND SELLING PROCESSES OF A NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO MANAGE MARKETING AND SELLING PROCESSES OF A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IMPLEMENT MARKETING PLAN

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	Marketing concepts outlined in business plan are integrated into business activities and tasks and activities drawn up accordingly.			
AC 2	Suitable ways in which to promote product/service of new venture are determined and implemented according to marketing plan.			
AC 3	Selling techniques are utilised to promote product/service.			
AC 4	Customer relations practices are implemented to ensure customer satisfaction.			

SPECIFIC OUTCOME 2: NEGOTIATE A DEAL WITH A CUSTOMER

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Basic principles of negotiation that are utilised to secure new business are outlined and explained with examples.			
AC 2	The principles of planning for negotiations are explained and implemented according to own business context and market research.			
AC 3	Appropriate negotiation techniques are applied to own venture and business contexts.			

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SPECIFIC OUTCOME 3: OUTLINE PROCESSES AND PRINCIPLES FOR COMPLETING BASIC QUOTES					
SPECIFIC OUTCOME 3		C	NYC	COMMENTS	
AC 1	The different types of offers are explained in relation to securing business transactions.				
AC 2	Principles and procedures for compiling quotes are identified and explained in relation to own business context.				
AC 3	Support in compiling quotes is sought where necessary in order to ensure full understanding of the criteria that apply.				
AC 4	The common pitfalls in quoting and order taking are explained with examples in relation to own business venture.				
SPECIFIC OUTCOME 4: OUTLINE PROCESSES AND PRINCIPLES FOR COMPLETING TENDER DOCUMENTS					
SPECIFIC OUTCOME 4		C	NYC	COMMENTS	
AC 1	Tendering principles pertaining to commercial and public tenders are explained with examples.				
AC 2	The risks associated with tendering are identified and basic risk management procedures are implemented according to own business context.				
AC 3	The financial advantages and disadvantages of a tender are analysed to determine if it would make business sense to submit the tender.				
AC 4	Support is sought to complete tender documents where relevant in order to ensure full understanding of tendering conditions and criteria.				
OVERALL ASSESSMENT DECISION					
ASSESSORS COMMENTS:					

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MODULE 3: SUMMATIVE ASSESSMENT

SUMMATIVE ASSESSMENT		UNIT STANDARD 119672	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS AND COMPLETE ALL TASKS (PRACTICAL)			
TASK 1		SO 1, AC 1, AC 2, AC 3, AC 4	
The marketing concept holds that the key to achieving organizational goals consists of being more effective than competitors in integrating marketing activities toward determining and satisfying the needs and wants of target markets. In order to successfully manage marketing and selling processes of a new venture, you are required to implement marketing plan by completing the following tasks.			
I.	Integrate marketing concepts outlined in your business plan into business activities		(8)
INSERT AFTER THIS PAGE AND MARK IT PAGE 17A			
II.	Determine and implement suitable ways in which to promote product/service of new venture		(8)
INSERT AFTER THIS PAGE AND MARK IT PAGE 17B			
III.	Utilise selling techniques to promote product/service		(6)
INSERT AFTER THIS PAGE AND MARK IT PAGE 17C			
IV	Implement customer relations practices to ensure customer satisfaction		(6)
INSERT AFTER THIS PAGE AND MARK IT PAGE 17D			
TASK 2		SO 2, AC 2, AC 3	
You are now required to negotiate a deal with a customer. The following guidelines will assist you			
I.	Explain and implement the principles of planning for negotiations according to own business context and market research		(8)

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TASK 4		SO 4, AC 1, AC 2, AC 3, AC 4	
I.	Explain tendering principles that pertain to commercial and public tenders using examples.	(2)	
II.	Identify risks associated with tendering. Describe the basic risk management procedures that you will implement to your own business.	(2)	
III.	Analyse the financial advantages and disadvantages of a tender. (Note; Clearly indicate if it would be sensible to submit the tender after your analysis).	(2)	
IV.	Explain the importance of seeking for support when completing tender documents	(2)	
TOTAL MARKS		/ 73	
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:**BAP MODULE 3 – SUMMATIVE ASSESSMENTS****CANDIDATE'S NAME:**

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER "MET REQUIREMENTS" (C FOR COMPETENT) OR "DID NOT MEET REQUIREMENTS" (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS**MANAGE MARKETING AND SELLING PROCESSES OF A NEW VENTURE****OVERALL OUTCOME:**

THE LEARNER MUST BE ABLE TO MANAGE MARKETING AND SELLING PROCESSES OF A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IMPLEMENT MARKETING PLAN

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	Marketing concepts outlined in business plan are integrated into business activities and tasks and activities drawn up accordingly.			
AC 2	Suitable ways in which to promote product/service of new venture are determined and implemented according to marketing plan.			
AC 3	Selling techniques are utilised to promote product/service.			
AC 4	Customer relations practices are implemented to ensure customer satisfaction.			

SPECIFIC OUTCOME 2: NEGOTIATE A DEAL WITH A CUSTOMER

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Basic principles of negotiation that are utilised to secure new business are outlined and explained with examples.			
AC 2	The principles of planning for negotiations are explained and implemented according to own business context and market research.			
AC 3	Appropriate negotiation techniques are applied to own venture and business contexts.			



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SPECIFIC OUTCOME 3: OUTLINE PROCESSES AND PRINCIPLES FOR COMPLETING BASIC QUOTES					
SPECIFIC OUTCOME 3		C	NYC	COMMENTS	
AC 1	The different types of offers are explained in relation to securing business transactions.				
AC 2	Principles and procedures for compiling quotes are identified and explained in relation to own business context.				
AC 3	Support in compiling quotes is sought where necessary in order to ensure full understanding of the criteria that apply.				
AC 4	The common pitfalls in quoting and order taking are explained with examples in relation to own business venture.				
SPECIFIC OUTCOME 4: OUTLINE PROCESSES AND PRINCIPLES FOR COMPLETING TENDER DOCUMENTS					
SPECIFIC OUTCOME 4		C	NYC	COMMENTS	
AC 1	Tendering principles pertaining to commercial and public tenders are explained with examples.				
AC 2	The risks associated with tendering are identified and basic risk management procedures are implemented according to own business context.				
AC 3	The financial advantages and disadvantages of a tender are analysed to determine if it would make business sense to submit the tender.				
AC 4	Support is sought to complete tender documents where relevant in order to ensure full understanding of tendering conditions and criteria.				
OVERALL ASSESSMENT DECISION					
ASSESSORS COMMENTS:					

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MODULE 4: SELF ASSESSMENT QUESTIONS

SELF ASSESSMENT		UNIT STANDARD 119670	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
Identify and explain any 5 legal registrations that an entrepreneur intending to start a construction company must comply with			
1.			
2.			
3.			
4.			
5.			
QUESTION 2			
Which type of business plan does one need when looking for money to finance a new venture?			
QUESTION 3			
Explain why it is important to be honest in a business plan aimed at attracting investors to a new venture			

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QUESTION 4

Identify important things that must be there before one starts to compile a business plan for a new venture

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MODULE 4: FORMATIVE ASSESSMENT

FORMATIVE ASSESSMENT		UNIT STANDARD 119670	
Method	Written: Self-reflection. Individual Task. Complete this part of the workbook with your facilitator.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS			
QUESTION 1		SO 1, AC 1, SO 3, AC 3	
Which of the following is an example of a business type?			(1)
A.	Pick-and-Pay		
B.	Partnership		
C.	Mine		
D.	Department of Health		
QUESTION 2		SO 1	AC 2
SARS is responsible for;			(1)
A.	Collecting skills development levy		
B.	Company tax		
C.	COIDA		
D.	Regional Services Council fees		
QUESTION 3		SO 1	AC 3
State whether the following statement is true or false			(1)
A business plan is composed of business, financial, marketing, and operational plans.			
TRUE		FALSE	
QUESTION 4		SO 1	AC 5, AC 6
Which of the following are the purposes of a business plan?			(1)
A.	Used to when paying taxes to SARS		
B.	To source capital		
C.	Instrument for disciplining employees		
D.	It is a blueprint used when running the business		
SECTION B – ANSWER ALL QUESTIONS			

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TASK 1	SO 1	AC 4
Why is it important for an entrepreneur to be honest when writing a business plan to attract customers and investors?		(3)
TASK 2	SO 2	AC 2
Kaphela is a young man aged 26. He intends to start a business of lending money to people in his community. Suggest the broad functions that must exist in his organisational chart		(5)
TASK 3	SO 2	AC 3
Using the diagram below, explain the term line of authority and responsibility (4 marks)		
<pre> graph TD CEO[CEO] --- Marketing[Marketing] CEO --- Operations[Operations] CEO --- Finance[Finance] Marketing --- Sales[Sales] Marketing --- Distribution[Distribution] Finance --- HR[Human Resources] Finance --- BS[Business Support] Finance --- ICT[ICT] </pre>		

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 4 – FORMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER “MET REQUIREMENTS” (C FOR COMPETENT) OR “DID NOT MEET REQUIREMENTS” (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

PRODUCE A BUSINESS PLAN FOR A NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO PRODUCE A BUSINESS PLAN FOR A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IDENTIFY AND DEMONSTRATE UNDERSTANDING OF THE ELEMENTS OF A BUSINESS PLAN

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	Legal business types for new ventures are identified and explained with examples.			
AC 2	Legal registrations and any legislative compliance in relation to new venture are explained and included in business plan.			
AC 3	A business plan is explained in terms of business, financial, marketing and operations plans.			
AC 4	The codes of ethics pertaining to a business plan are identified and explained with examples.			
AC 5	The business plan for the purpose of a management tool for new venture is explained with examples.			
AC 6	The business plan for the purpose of funding a new venture is explained with examples.			

SPECIFIC OUTCOME 2: COMPILER AN ORGANISATION STRUCTURE FOR ONE'S OWN BUSINESS TO DETERMINE HOW A BUSINESS PLAN CAN BEST BE INTEGRATED

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	A business organogram is drawn up for own business.			

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AC 2	The broad functions required to effectively complete business activities are described according to overall business goals.			
AC 3	Lines of authority and responsibility are designated in relation to organogram.			
AC 4	Any relevant human resources needs are determined accordingly.			
SPECIFIC OUTCOME 3: IDENTIFY RESOURCES AND INFORMATION REQUIRED TO COMPLETE OWN BUSINESS PLAN				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	Coaches/mentors are identified to assist in compiling business plan (where relevant).			
AC 2	Information on the resources needed and procedures to be followed to achieve the plan is compiled in order to effectively execute business plan.			
AC 3	The type of business ownership is decided upon and registration completed accordingly.			
AC 4	The industry specific and legal requirements for own venture are identified and explained in terms of how they will affect the venture.			
AC 5	All relevant information is gathered for the completion of the business plan.			
SPECIFIC OUTCOME 4: COMPILE BUSINESS PLAN				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	The structure and layout of the business plan is designed to be compatible with the nature of own venture.			
AC 2	Business and operational goals are identified and procedures for the effective implementation thereof are outlined in business plan.			
AC 3	Marketing plans are included in business plan.			
AC 4	Financial and cash flow plans are included in business plan.			
AC 5	An outline of how business will operate and achieve marketing and financial objectives are included in business plan.			
AC 6	A vision statement that represents the goals and objectives of the new venture is outlined and integrated into overall business activities			

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ASSESSORS COMMENTS:

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MODULE 4: SUMMATIVE ASSESSMENT

SUMMATIVE ASSESSMENT		UNIT STANDARD 119670	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS AND COMPLETE ALL TASKS (PRACTICAL)			
Work on the following tasks, gathering evidence and attaching all documentation used. Be as practical as possible and use current and past projects to answer the questions asked.			
Instructions			
You are required to think of a business venture that you intend to run in the foreseeable future. In addition, you must have a good understanding of the venture in terms of its inputs, processes and outputs. Using that venture answer the following tasks.			
TASK 1		SO 2, AC 1, AC 4	
I.	Draw an organogram for the business venture.		(5)

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TASK 3		SO 4, AC 1, AC 2, AC 3, AC 4, AC 5, AC 6	
Prepare a detailed business plan using the layout and structure guidelines specified in the learner guide. Note the following; <ul style="list-style-type: none"> ▪ The structure and layout of the business plan must be compatible with the nature of the venture. ▪ Business and operational goals are clearly stated in the plan ▪ Include the marketing plan of the venture ▪ Include the financial and cash flow plans ▪ Include an outline of how the business will operate and achieve marketing and financial objectives. ▪ Include mission and vision statements [40 MARKS]			
COMPLETE THIS TASK AND INSERT AS PAGE 19A			
TOTAL MARKS			/ 62
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 4 – SUMMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER “MET REQUIREMENTS” (C FOR COMPETENT) OR “DID NOT MEET REQUIREMENTS” (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

PRODUCE A BUSINESS PLAN FOR A NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO PRODUCE A BUSINESS PLAN FOR A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IDENTIFY AND DEMONSTRATE UNDERSTANDING OF THE ELEMENTS OF A BUSINESS PLAN

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	Legal business types for new ventures are identified and explained with examples.			
AC 2	Legal registrations and any legislative compliance in relation to new venture are explained and included in business plan.			
AC 3	A business plan is explained in terms of business, financial, marketing and operations plans.			
AC 4	The codes of ethics pertaining to a business plan are identified and explained with examples.			
AC 5	The business plan for the purpose of a management tool for new venture is explained with examples.			
AC 6	The business plan for the purpose of funding a new venture is explained with examples.			

SPECIFIC OUTCOME 2: COMPILE AN ORGANISATION STRUCTURE FOR ONE'S OWN BUSINESS TO DETERMINE HOW A BUSINESS PLAN CAN BEST BE INTEGRATED

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	A business organogram is drawn up for own business.			

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AC 2	The broad functions required to effectively complete business activities are described according to overall business goals.			
AC 3	Lines of authority and responsibility are designated in relation to organogram.			
AC 4	Any relevant human resources needs are determined accordingly.			
SPECIFIC OUTCOME 3: IDENTIFY RESOURCES AND INFORMATION REQUIRED TO COMPLETE OWN BUSINESS PLAN				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	Coaches/mentors are identified to assist in compiling business plan (where relevant).			
AC 2	Information on the resources needed and procedures to be followed to achieve the plan is compiled in order to effectively execute business plan.			
AC 3	The type of business ownership is decided upon and registration completed accordingly.			
AC 4	The industry specific and legal requirements for own venture are identified and explained in terms of how they will affect the venture.			
AC 5	All relevant information is gathered for the completion of the business plan.			
SPECIFIC OUTCOME 4: COMPILE BUSINESS PLAN				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	The structure and layout of the business plan is designed to be compatible with the nature of own venture.			
AC 2	Business and operational goals are identified and procedures for the effective implementation thereof are outlined in business plan.			
AC 3	Marketing plans are included in business plan.			
AC 4	Financial and cash flow plans are included in business plan.			
AC 5	An outline of how business will operate and achieve marketing and financial objectives are included in business plan.			
AC 6	A vision statement that represents the goals and objectives of the new venture is outlined and integrated into overall business activities			

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MODULE 5: SELF ASSESSMENT QUESTIONS

SELF ASSESSMENT		UNIT STANDARD 113924	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
List 5 values that are the most important to you.			
1.			
2.			
3.			
4.			
5.			
QUESTION 2			
How can one's personal ethics influence the use of language?			

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SELF ASSESSMENT		UNIT STANDARD 119713	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
QUESTION 1			
Define the term disciplinary procedures			
QUESTION 2			
Identify and explain legislation that applies to employment			

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III.	Your realised that one of the messengers in your organisation is taking company envelopes and reselling at his tuck shop at home.	(2)
TASK 2	SO 4	AC 3
What would you do to deal with the following situations where employee rights were undermined?		
Scenario 1:	Faizel lost his job. He was dismissed without any notice and paid no money in lieu of notice. He was also not paid any leave pay that he believes was owing to him. He does not want to get his job back. He only wants to claim the notice and leave money that is owing to him	(4)
Scenario 2:	Shezi is employed by a sub-contracting labour broking company. A labour broker ('temporary employment service') is someone who supplies labour to the farmer to assist with the picking or pruning requirements of the farm. The company has hired her services out to a farmer where she works as a picker. After two weeks of working on the farm, Shezi has not been paid for any of the overtime she has worked. When she asks the farmer for her overtime money, he tells her he agreed to pay a flat rate to the sub-contractor and he does not have to pay any overtime. He tells her to go to the sub-contractor. She goes to the sub-contractor who tells her that the overtime has got nothing to do with him – she must get payment from the farmer.	(4)

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Scenario 3 : For the past year Gadija has worked every Saturday and Sunday as a casual shelf-packer for Shoprite. She works up to 20 hours on a weekend. She had a bad flu' over one weekend, informed her manager that she was too ill to work and stayed in bed at home. Even though she provided a doctor's certificate, Shoprite refused to pay her for the days she was ill.			(2)
TOTAL MARKS			/ 58
Learner Signature		Date	
Assessor Signature		Date	
Moderator signature		Date	
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT

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ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER "MET REQUIREMENTS" (C FOR COMPETENT) OR "DID NOT MEET REQUIREMENTS" (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS**APPLY BASIC BUSINESS ETHICS IN A WORK ENVIRONMENT****OVERALL OUTCOME:**

THE LEARNER MUST BE ABLE TO APPLY BASIC BUSINESS ETHICS IN A WORK ENVIRONMENT

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: REFLECT ON OWN VALUES AND BELIEF SYSTEMS AND HOW THEY INFLUENCE OWN BEHAVIOUR

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	The concepts of values, belief systems and ethics are explained with examples.			
AC 2	The source(s) of values and belief systems are identified and an indication is given of how an individual's ethics and values affect behaviour.			
AC 3	Ways in which an individual may change his/her belief or value system are identified with examples.			

SPECIFIC OUTCOME 2: DISCUSS HOW AN INDIVIDUAL'S ETHICS IMPACT ON THE PEOPLE AROUND HIM/HER.

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Ways in which an individual's ethics impact on behaviour and interpersonal relationships are indicated with examples.			
AC 2	The impact of personal ethics on the use of language is explained with examples.			
AC 3	The importance of respecting confidentiality is explained in own context.			



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AC 4	Ways in which an individual can influence the behaviour of others are identified and an indication is given of how this can impact on ethical conduct.			
SPECIFIC OUTCOME 3: EXPLAIN HOW AN INDIVIDUAL CAN BEHAVE ETHICALLY IN A BUSINESS ENVIRONMENT				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	The concept of ethical business practice is explained with examples.			
AC 2	Adherence to company policy and confidentiality are discussed in terms of ethical conduct			
AC 3	Ethical ways of receiving and giving gifts and favours in a business context are discussed with reference to an organisation`s code of conduct.			
AC 4	The importance of honesty in business dealings is explained with examples.			
AC 5	The deliverables in own work situation are identified and an indication is given of the importance of productivity, accountability, attendance and delivery of work on time.			
SPECIFIC OUTCOME 4: DEMONSTRATE TECHNIQUES FOR DEALING WITH SITUATIONS WHERE OWN ETHICS AND VALUES CONFLICT WITH WORK				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	Methods for dealing with unethical behaviour are demonstrated for three different situations.			
AC 2	Methods of dealing with unethical business conduct are demonstrated for three scenarios.			
AC 3	Own values and beliefs are compared to company practice and an indication is given of how an employee can deal with a situation where there is a conflict of an ethical nature.			
AC 4	Ways of dealing with instances where an employee`s rights are undermined are demonstrated for three case studies.			
OVERALL ASSESSMENT DECISION				
ASSESSORS COMMENTS:				

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FORMATIVE ASSESSMENT		UNIT STANDARD 119713	
Method	Written: Self-reflection. Individual Task. Complete this part of the workbook with your facilitator.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS			
QUESTION 1		SO 1, AC 1; SO 2, AC 1; SO 3, AC1	
Define the following terms			(10)
I.	Human resources		
II.	Recruitment		
III.	Selection		
IV.	Planning		
V.	Disciplinary procedures		

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II.	Which steps should be followed when conducting performance reviews?	(2)
IV.	Describe the role of trade unions in the workplace.	(4)
TOTAL MARKS		/ 50
Learner Signature		Date
Assessor Signature		Date
Moderator signature		Date
ASSESSMENT OUTCOME	COMPETENT	NOT YET COMPETENT

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PRACTICAL ASSESSMENT

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MARKS: THE LEARNER IS EITHER "MET REQUIREMENTS" (C FOR COMPETENT) OR "DID NOT MEET REQUIREMENTS" (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

APPLY BASIC HR PRINCIPLES IN A NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO APPLY BASIC HR PRINCIPLES IN A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IDENTIFY AND PLAN FOR THE HUMAN RESOURCES NEEDS OF A NEW VENTURE

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	A basic skills survey is undertaken to determine the skills requirements of a new venture.			
AC 2	The human resources capacity requirements in new venture are determined.			
AC 3	The cost implications for employing staff are determined.			
AC 4	A decision is taken regarding employment possibilities and a basic profile of each person to be employed is drawn up for interviewing purposes.			

SPECIFIC OUTCOME 2: IMPLEMENT THE HUMAN RESOURCES NEEDS OF A NEW VENTURE

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Selection and recruitment of new staff is undertaken where relevant according to a basic recruitment and selection plan.			
AC 2	Employment contracts are drawn up.			

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AC 3	Job descriptions are compiled and new recruits/employees informed of their duties.			
AC 4	Employees are managed on an ongoing basis and regular performance reviews are conducted to ensure that overall job criteria and development needs are being addressed.			
SPECIFIC OUTCOME 3: IDENTIFY AND COMPILE BASIC EMPLOYMENT POLICIES AND PROCEDURES				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	Disciplinary procedures are established.			
AC 2	Grievance procedures are established.			
AC 3	Recruitment and retrenchment procedures are implemented.			
AC 4	Basic development plans to further develop the skills of employees are compiled and implemented.			
AC 5	The role of employees, trade unions and employers in the workplace are understood.			
SPECIFIC OUTCOME 4: COMPLY WITH RELEVANT HUMAN RESOURCES LEGISLATION				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	Legislation that applies to employment is identified and explained.			
AC 2	Employment conditions are interpreted and applied for own venture.			
AC 3	Policies are implemented to ensure equity in new venture.			
AC 4	Plans that relate to legislative matters are communicated to staff and relevant stakeholders.			
OVERALL ASSESSMENT DECISION				
ASSESSORS COMMENTS:				

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MODULE 5: SUMMATIVE ASSESSMENT

SUMMATIVE ASSESSMENT		MODULE 1: UNIT STANDARD 113924	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS AND COMPLETE ALL TASKS			
SECTION 1		SO 1	AC 2
I.	List your personal values and beliefs		(6)
II.	What are the sources of the values and beliefs you identified above?		(4)
QUESTION 2		SO 1	AC 3
I.	List all the values that are the most important to you		(5)
1.			
2.			
3.			
4.			
5.			
II.	Write the answers to this series of questions, for each of these values to determine which ones you want to change		(10)
<ul style="list-style-type: none"> ▪ Is this something that's important to you? 			

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- Do you feel good about this being important to you?
- Would you feel good if people you respect knew this was important to you?
- Have you ever done anything that indicates that this is important to you?
- Is this something you would stand by even if others made fun of you for it?
- Does this fit with your vision of who you are?

COMPLETE THIS TASK ON A SEPARATE PAPER AND NUMBER IT PAGE 24A

III.	Divide your list of values into two columns to separate the values you want to keep from those you would like to change, based on the questions you just answered. Amend these values or add new ones so they reflect what you now believe	(6)
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QUESTION 3	SO 3, AC 5; SO 4, AC 4
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I.	Describe the job that you do or shall do in the future	(1)
----	--	-----

--	--

II.	List and 4 deliverables for the job you identified	(4)
-----	--	-----

III.	What ethical standards are you expected to abide by when discharging your job deliverables	(8)
------	--	-----

SECTION B COMPLETE ALL TASKS**TASK 1****SO 4****AC 3**

List the values for your company and compare them with your personal values. Identify conflicting values and explain how you can resolve them

(10)**TASK 2****SO 4****AC 2**

Fred Khumalo is the internal auditor for about 10years of a major insurance company that has both a short and long term portfolio. He enjoys all the perks offered to him and has been nominated to the board as a regional director. However, he had become aware that the CEO was processing claims that were redundant and siphoning funds into various accounts. When he questioned these transactions he was told to ignore the issue and merely sign off the audit records. He broached the issue with the CFO who told him to ignore it and pretend it did not exist. Even the COO and other members also shrugged and some did not even wish to comment, instead mumbling incoherent sentences and excusing themselves.

Khumalo finally decided to approach the CEO directly and informed him that if he does not come clean, he will inform the shareholders. The CEO asked Khumalo to give the matter careful thought and not to jeopardize his position – adding that if Khumalo seeks employment elsewhere, it will be impossible to find alternate employment or even start out on his own.

Two weeks later, without prior warning Khumalo was transferred to another branch where a position was created for him. In effect, Khumalo had been fired.

I. Discuss Khumalo’s right to blow the whistle on the CEO?

(5)

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II.	What can be done to deal with this ethical issue	(2)
TASK 4	SO 4	AC 2
<p>Jane Goodall always worked well with people. So when she opened her fast food outlet Good Grub, she anticipated that managing her employees would be the easy part. She had after all for the past 20years with many different personalities. Her business flourished and she opened four additional outlets in nearby suburbs.</p> <p>Jamie Oliver was her chief chef and he was very good, resulting in the customers loving one of his specialities – JO – a pitta bread filled with roasted vegetables and lamb strips topped with a delectable sauce – all prepared by Jamie. Because Jamie was enthusiastic even putting in his share working at the sales counter, Jane was considering making him a shareholder and even said so to him. This she looked at as a strategic ploy since it would cut down on any wastage if he knew it was his business too. A few weeks later Jamie’s wife Cruella visited Good Grub, saying that she felt like eating a JO. After making small talk with Jane for almost 10 minutes, she awkwardly told Jane that Jamie has AIDS. She told Jane that she felt that Jane ought to know – and as Jamie’s employer she was entitled to know.</p> <p>Shortly thereafter Cruella left the store, leaving Jane to recover from the staggering news.</p> <p>Jane was still concerned and upset when she saw Jamie the next day. “Perhaps he did look thinner and more tired during the last few months”, thought Jane and dismissed it as being due to his heavy workload. Jamie was his usual upbeat self and this confused Jane. She also wanted to discuss Cruella’s visit but could not get herself to do it. She liked Jamie, but face it, she thought, he is my employee not my friend. Later she thought perhaps it is her business because there were talks that customers had stopped going to a local bakery because the chief confectioner had AIDS.</p> <p>Jane did not want her business to suffer the same fate as the bakery where the confectioner stayed but the customers did not. She was after all running a business. Jane knew it was illegal to fire Jamie for having AIDS, and in any case that was not the type of person she was. But she realised that she could not skirt the problem in the same way as some big companies did, by simply sending the employee home at full pay. That deprives the employee of meaningful employment, but it removes any difficulties in the workplace, and the employee has no legal grounds for complaint if left on the payroll. Then there is also the issue of Jamie’s future work performance. Putting the question of the partnership aside, if he is really so ill his performance could decline. Shouldn’t Jane be developing some plan for dealing with that?</p>		
I.	What are the moral issues in this case?	(2)

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II.	Is it ethical for Jane to ask Jamie about his AIDS status?	(2)
III.	How can this ethical issue be resolved assuming you got to discover it.	(6)
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Learner Signature		Date
Assessor Signature		Date
Moderator signature		Date
ASSESSMENT OUTCOME	COMPETENT	NOT YET COMPETENT

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ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD:

BAP MODULE 5 – SUMMATIVE ASSESSMENTS

CANDIDATE'S NAME:

ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

I DECLARE THAT THIS ASSESSMENT IS MY OWN DEMONSTRATION.

MARKS: THE LEARNER IS EITHER “MET REQUIREMENTS” (C FOR COMPETENT) OR “DID NOT MEET REQUIREMENTS” (NYC FOR NOT YET COMPETENT). IF THE LEARNER IS DID NOT MEET REQUIREMENTS IN AN AREA, THEN HE OR SHE MUST BE REASSESSED.

LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

APPLY BASIC BUSINESS ETHICS IN A WORK ENVIRONMENT

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO APPLY BASIC BUSINESS ETHICS IN A WORK ENVIRONMENT

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: REFLECT ON OWN VALUES AND BELIEF SYSTEMS AND HOW THEY INFLUENCE OWN BEHAVIOUR

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	The concepts of values, belief systems and ethics are explained with examples.			
AC 2	The source(s) of values and belief systems are identified and an indication is given of how an individual's ethics and values affect behaviour.			
AC 3	Ways in which an individual may change his/her belief or value system are identified with examples.			

SPECIFIC OUTCOME 2: DISCUSS HOW AN INDIVIDUAL'S ETHICS IMPACT ON THE PEOPLE AROUND HIM/HER.

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Ways in which an individual's ethics impact on behaviour and interpersonal relationships are indicated with examples.			
AC 2	The impact of personal ethics on the use of language is explained with examples.			
AC 3	The importance of respecting confidentiality is explained in own context.			

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AC 4	Ways in which an individual can influence the behaviour of others are identified and an indication is given of how this can impact on ethical conduct.			
SPECIFIC OUTCOME 3: EXPLAIN HOW AN INDIVIDUAL CAN BEHAVE ETHICALLY IN A BUSINESS ENVIRONMENT				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	The concept of ethical business practice is explained with examples.			
AC 2	Adherence to company policy and confidentiality are discussed in terms of ethical conduct			
AC 3	Ethical ways of receiving and giving gifts and favours in a business context are discussed with reference to an organisation`s code of conduct.			
AC 4	The importance of honesty in business dealings is explained with examples.			
AC 5	The deliverables in own work situation are identified and an indication is given of the importance of productivity, accountability, attendance and delivery of work on time.			
SPECIFIC OUTCOME 4: DEMONSTRATE TECHNIQUES FOR DEALING WITH SITUATIONS WHERE OWN ETHICS AND VALUES CONFLICT WITH WORK				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	Methods for dealing with unethical behaviour are demonstrated for three different situations.			
AC 2	Methods of dealing with unethical business conduct are demonstrated for three scenarios.			
AC 3	Own values and beliefs are compared to company practice and an indication is given of how an employee can deal with a situation where there is a conflict of an ethical nature.			
AC 4	Ways of dealing with instances where an employee`s rights are undermined are demonstrated for three case studies.			
OVERALL ASSESSMENT DECISION				
ASSESSORS COMMENTS:				

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SUMMATIVE ASSESSMENT		UNIT STANDARD 119713	
Method	Written: Self-reflection. Individual Task.		
Resources	Learner Guide and Slides		
SECTION A: ANSWER ALL QUESTIONS AND COMPLETE ALL TASKS (PRACTICAL)			
You have been working for a Government Department for the past ten years. Recently, you heard from a friend that the Company's Act 2008 makes it easier for individuals to open businesses of their choice provided certain policies and procedures are followed accordingly. You have decided to open your own enterprise and your friend told you that you must first of all understand human resources principles that you will need to apply in your new venture. The following tasks will help you to do this. Take time to complete each task, remember, the success of your new venture directly depends on this. (Note: attach all the necessary evidence).			
TASK 1		SO 1, AC 1, AC 2, AC 3, AC 4	
You are required to identify and plan for the human resource needs of a new venture. The following guidelines will help you			
I.	Undertake a basic skills survey in order to determine the skills requirements of the new venture	(8)	
II.	Determine the human resources capacity requirements in your new venture	(5)	
III.	Determine the cost implications for employing staff	(5)	
IV.	Draw up a job profile for each person you are going to employ for interviewing purposes. (Note; make sure you include all the relevant information)	(15)	
COMPLETE THIS TASK ON A SEPARATE PAPER AND INSERT AS PAGE 36A			
TASK 2		SO 2, AC 1, AC 2, AC 3, AC 4	
You have successfully identified and planned for the human resources needs of your new venture, now you must move on to implementing these human resources needs by completing the following tasks.			
I.	Undertake recruitment and selection of new staff using a basic recruitment and selection plan.	(8)	

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II.	Compile an employment contract for an employee in your new venture. Include all the working conditions outlined in the Basic Conditions of the Employment Act.	(10)
COMPLETE THIS TASK ON A SEPARATE PAPER AND INSERT AS PAGE 37A		
III.	Compile job descriptions and inform new recruits/employees of their duties	(10)
COMPLETE THIS TASK ON A SEPARATE PAPER AND INSERT AS PAGE 37B		
IV.	Identify and explain methods and procedures that you can use to manage employees on an ongoing basis.	(6)
V.	Conduct performance reviews to ensure that overall job criteria and development needs are being addressed	(6)
COMPLETE THIS TASK ON A SEPARATE PAPER AND INSERT AS PAGE 37C		
TASK 3		SO 3, AC 1, AC 2, AC 3, AC 4, AC 5
You are now required to identify and compile basic employment procedures using the following guidelines		
<ul style="list-style-type: none"> ▪ Establish disciplinary procedures in your new venture. ▪ Establish grievance procedures in your new venture. ▪ Implement recruitment and retrenchment procedures in your new venture. ▪ Compile and implement basic development plans. Clearly explain the importance of basic skills development plans. ▪ Clearly describe the role of employees, trade unions and employers in the workplace 		
COMPLETE THIS TASK ON A SEPARATE PAPER AND INSERT AS PAGE 37D		
TASK 4		SO 4, AC 1, AC 2, AC 3, AC 4
I.	Identify and explain legislation that applies to employment	(6)

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II.	How would you communicate legislative matters to your staff?			(4)
TOTAL MARKS				/ 83
Learner Signature		Date		
Assessor Signature		Date		
Moderator signature		Date		
ASSESSMENT OUTCOME	COMPETENT		NOT YET COMPETENT	

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BAP MODULE 5 – SUMMATIVE ASSESSMENTS

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ASSESSOR'S NAME:

PRACTICAL ASSESSMENT

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LEARNER ACHIEVED: MET REQUIREMENTS/MET REQUIREMENTS

APPLY BASIC HR PRINCIPLES IN A NEW VENTURE

OVERALL OUTCOME:

THE LEARNER MUST BE ABLE TO APPLY BASIC HR PRINCIPLES IN A NEW VENTURE

NOTE: WHEN LEARNER DO PRACTICAL ASSESSMENTS ENSURE THAT THEY MEET THE OVERALL OUTCOME.

SPECIFIC OUTCOME 1: IDENTIFY AND PLAN FOR THE HUMAN RESOURCES NEEDS OF A NEW VENTURE

SPECIFIC OUTCOME 1		C	NYC	COMMENTS
AC 1	A basic skills survey is undertaken to determine the skills requirements of a new venture.			
AC 2	The human resources capacity requirements in new venture are determined.			
AC 3	The cost implications for employing staff are determined.			
AC 4	A decision is taken regarding employment possibilities and a basic profile of each person to be employed is drawn up for interviewing purposes.			

SPECIFIC OUTCOME 2: IMPLEMENT THE HUMAN RESOURCES NEEDS OF A NEW VENTURE

SPECIFIC OUTCOME 2		C	NYC	COMMENTS
AC 1	Selection and recruitment of new staff is undertaken where relevant according to a basic recruitment and selection plan.			
AC 2	Employment contracts are drawn up.			

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AC 3	Job descriptions are compiled and new recruits/employees informed of their duties.			
AC 4	Employees are managed on an ongoing basis and regular performance reviews are conducted to ensure that overall job criteria and development needs are being addressed.			
SPECIFIC OUTCOME 3: IDENTIFY AND COMPILE BASIC EMPLOYMENT POLICIES AND PROCEDURES				
SPECIFIC OUTCOME 3		C	NYC	COMMENTS
AC 1	Disciplinary procedures are established.			
AC 2	Grievance procedures are established.			
AC 3	Recruitment and retrenchment procedures are implemented.			
AC 4	Basic development plans to further develop the skills of employees are compiled and implemented.			
AC 5	The role of employees, trade unions and employers in the workplace are understood.			
SPECIFIC OUTCOME 4: COMPLY WITH RELEVANT HUMAN RESOURCES LEGISLATION				
SPECIFIC OUTCOME 4		C	NYC	COMMENTS
AC 1	Legislation that applies to employment is identified and explained.			
AC 2	Employment conditions are interpreted and applied for own venture.			
AC 3	Policies are implemented to ensure equity in new venture.			
AC 4	Plans that relate to legislative matters are communicated to staff and relevant stakeholders.			
OVERALL ASSESSMENT DECISION				
ASSESSORS COMMENTS:				

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