

No. 1207

15 December 2005

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

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

Wholesale and Retail

Registered by Organising Field 11, Services, publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the **SAQA** web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the **SAQA** offices, **Hatfield Forum West, 1069 Arcadia Street, Hatfield, Pretoria**.

Comment on the qualification and unit standards should reach **SAQA** at the address **below and no later than 20 January 2006**. All correspondence should be marked **Standards Setting – SGB for Wholesale and Retail** and addressed to

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SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:

Further Education and Training Certificate: Wholesale and Retail Store Administration

SAQA QUAL ID	QUALIFICATION TITLE		
50061	Further Education and Training Certificate: Wholesale and Retail Store Administration		
SGB NAME	ORGANISING FIELD ID	PROVIDER NAME	
SGB Retail and Wholesale	11		
QUAL TYPE	ORGANISING FIELD DESCRIPTION	SUBFIELD	
Further Ed and Training Cert	Services	Wholesale and Retail	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUALIFICATION CLASS
Undefined	120	Level 4	Regular-Unit Stds Based

PURPOSE AND RATIONALE OF THE QUALIFICATION

Purpose:

This qualification is a step in a learning pathway that underpins a career in the Wholesale and Retail arena. This qualification is rooted in actual practice and the learner is expected to be part of a public or private organisation and/or company operating in the area. It was designed specifically to meet the needs of the major chain stores who require trained individuals specialising in administration relevant to the industry.

As a result, the **FETC** in Wholesale and Retail Store Administration, NQF Level 4, is designed to meet the needs of the learners **who** are already employed and involved in the Wholesale and Retail field.

The Certificate will form part of a learning pathway that currently stretches from NQF Level 2 to a National Certificate at NQF Level 5.

Specifically, the purpose of this Certificate qualification is to equip learners to understand and acquaint themselves with the principles of administration within the Wholesale and Retail sector. The Certificate further aims to build capacity and improve skills in the Wholesale and Retail sector thus ensuring the development of competence 2nd increased service delivery in this field.

Rationale:

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

All those individuals who aspire to pursuing a career in the Wholesale and Retail Sector may benefit from this Qualification.

The development of competence in this field may lead to world-class service delivery and company longevity. Application of the learning achieved in completing this qualification may also assist persons to enter other industries where they may be able to apply their management skills in a different context.

This qualification reflects the needs of the Wholesale and Retail Sector both now and in the future. It gives accessibility and flexibility to learners employed at the appropriate level desiring learning and growth opportunities, especially those individuals wishing to enter the management level.

The added value of the **skills**, knowledge and understanding developed by the Certificate should result in greater productivity arising from the improved performance by the learner, due to the integration of the learning, which may have taken place in the workplace.

RECOGNIZE PREVIOUS LEARNING?

Y

LEARNING ASSUMED TO BE IN PLACE

It is assumed that learners are already competent in the following:

- > Mathematical Literacy at Level 3
- > Communication at Level 3
- > The Unit Standards entitled:
 - > "Operate a computer in the Wholesale and retail outlet"
 - > "Maintain and administer documents relating to client account"

Recognition of Prior Learning:

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

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

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

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

Access to the Qualification:

There is open access to any learner who is employed in the Wholesale and Retail sector or any related field in which sector specific Unit Standards and exit level outcomes can be assessed bearing in mind the learning assumed to be in place.

QUALIFICATION RULES

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

The Qualification is made up of Unit Standards classified as Fundamental, Core and Elective. A minimum of 120 Credits is required to complete the Qualification.

In this Qualification the Credits are allocated as follows:

- > All Fundamental Unit Standards totalling 56 Credits are compulsory.
- > All Core Unit Standard totalling 40 Credits are compulsory.
- > Learners are to select Elective Unit Standards totalling 24 Credits to complete the qualification. Learners may choose Electives from those provided in the qualification or the learners can choose any registered Unit Standard that is applicable to the learning required and that is approved by appropriate ETQA as an Elective within the Qualification.

EXIT LEVEL OUTCOMES

1. Communicate orally and in writing in two languages in a Wholesale and Retail and business environment.
2. Apply knowledge of mathematics in a defined environment.
3. Develop plans for and supervise individuals in work units.

4. Supervise functions relating to document administration in a Wholesale and Retail outlet.
5. Perform and supervise stock related functions.

ASSOCIATED ASSESSMENT CRITERIA

1:

- > Oral communication is responded to, analysed and evaluated correctly and information shared with clients.
- > A variety of texts are read, analysed and responded to correctly.
- > Texts are written and edited effectively and creatively.
- > Information from written texts are recalled, reorganised, summarised and evaluated for further use.
- > Audience and context needs are accommodated in oral communication.

2:

- > Calculations needed in the work situation are performed correctly mentally and using a calculator.
- > Mathematical concepts are applied to situations in daily life.

3:

- > Work plans are developed and aligned according to business plans.
- > Work is planned and allocated in a participative manner, in accordance with resourcing requirements.
- > Interpersonal team processes are managed to achieve required outputs.
- > Outcomes are compared with key performance areas as identified in the work plan.

4:

- > Administration documentation is analysed and verified according to organisational procedure.
- > Discrepancies within documentation are identified, analysed and resolved as per organisational procedures.
- > Documents are authorised according to administrative procedures of the organisation.
- > Documents are distributed to relevant parties according to set deadlines of the organisation
- > Storage and filing of retained documentation for future reference is completed as per organisational and legal requirements.
- > Confidential information is defined and described according to organisational procedures.
- > Time keeping records are authorised and forwarded to pay office as per organisational policies and procedures.

5:

- > Ways in which shrinkage and losses occur is explained in relation to the process of receiving and dispatching stock.
- > Stock records are maintained to enhance the supply chain following organisational procedures.
- > Stock to be dispatched is selected and prepared as per instruction and relevant documentation is completed according to organisational procedures.
- > Receipts and dispatches of stock are checked to have been recorded accurately and within deadlines.
- > Sales are monitored and staff not recording sales correctly are identified and appropriate measures to prevent future occurrences proposed.
- > Count records for periodic or perpetual stock checks are prepared and handed out for counting.

Integrated assessment:

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

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

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

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

context appropriate to the assessment.

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

INTERNATIONAL COMPARABILITY

This Qualification has been benchmarked against international practice in Wholesale and Retail. The following list of qualifications relate to the FETC: Wholesale and Retail Supervisory Management.

- > National Certificate in Business Administration: (0634) - New Zealand.
- > Certificate IV in Business (Administration): (BSA40100) - Australia.
- > Level 4 Administration: (G5W7) - Scotland.

In addition the Qualification relates to the following courses offered by independent providers:

- > **IIC** Mini Basic Business Administration Course in Russia - (www.mbba.rus).
- > Business Administration, Basic course offered by Orebro Universitet in Sweden - (www.oru.se).
- > Business Administration Course offered by Bemidji State University - (www.bemidjistate.edu).
- > Administration components of the Hotel Management Course offered at Utalii College in Kenya - (www.utalii.co.ke).

In addition to the above the international Unit Standards as listed below broadly translate to the newly developed Unit Standards as included in this Qualification.

- > Control administration in a Wholesale and Retail outlet:
 - > Complete administration tasks and use office equipment - (NZ 18221).
 - > Coordinate retail office - (AUS WRRCA4B).
 - > Administration - (SLEF3D).
- > Administer & authorise time keeping records for payroll purposes:
 - > Demonstrate time management - (NZ 12349).
 - > Prepare payroll - (AUS WRRF4B).
- > Administer stock control records:
 - > Operate inventory systems to record and monitor inventory activities - (NZ 334).
 - > Demonstrate knowledge of stock control procedures in a retail/distribution environment - (NZ1 1958).
 - > Maintain and order stock - (AUS WRR15A).
 - > Stock control - (SLD0ST).

Key:

- > NZ: New Zealand - (www.nzqa.govt.nz).
- > AUS: Australia - (www.nfqs.gov.au).
- > SL: Scotland - (www.sqa.org.uk).

ARTICULATION OPTIONS

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

- > (ID 20357): Certificate: Business Administration at NQF Level 4.
- > (ID 35928): National Certificate: Business Administration Services at NQF Level 4.

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

- > (ID 36150): Certificate: Administration Management at NQF Level 5.

- > (ID 36129): Diploma: Administration Management at NQF Level 5.
- > (ID 23618): Certificate: Office Administration at NQF Level 5.

MODERATION OPTIONS

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

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

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

- > To be registered as an assessor with the relevant **ETQA**.
- > To be in possession of a relevant Qualification at NQF Level 5 or higher.
- > A minimum of three years practical and relevant occupational experience.

CRITERIA FOR THE REGISTRATION OF ASSESSORS

N/A

NOTES

N/A

UNIT STANDARDS

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

	UNIT STANDARD ID AND TITLE	LEVEL	CREDITS	STATUS
Core	120315 Control Administration in a Wholesale and Retail outlet	Level 4	20	Draft - Prep for P Comment
Elective	13914 Conduct a formal meeting	Level 3	3	Registered
Elective	13917 Indicate the role of a team leader ensuring that a team meets an organisation's standards	Level 3	6	Registered
Elective	13931 Monitor and control the maintenance of office equipment	Level 3	4	Registered
Elective	114892 Dispatch stock	Level 3	10	Registered
Elective	114896 Receive stock	Level 3	12	Registered
Elective	114901 Control customer repairs and credits	Level 3	8	Registered
Elective	114905 Administer day-end cashing up procedures	Level 3	8	Registered
Elective	114909 Administer and control the organisation's deposits and floats	Level 3	8	Registered
Elective	116714 Lead a team, plan, allocate and assess their work	Level 3	4	Registered
Elective	117877 Perform one-to-one training on the job	Level 3	4	Registered

Elective	11473 Manage individual and team performance	Level 4	8	Registered
Elective	13944 Describe the relationship of junior management to the general management function	Level 4	5	Registered
Elective	13947 Motivate a team	Level 4	6	Registered
Elective	13952 Demonstrate basic understanding of the Primary labour legislation that impacts on 2 business unit	Level 4	8	Registered
Elective	14667 Describe and apply the management functions of an organization	Level 4	10	Registered
Elective	110009 Manage administration-recon%	Level 4	4	Registered
Elective	114741 Finalise and interpret accounts	Level 4	4	Registered
Elective	118040 Control credit administration	Level 4	8	Registered
Elective	120314 Administer Stock Control Records	Level 4	10	Draft - Prep for P Comment
Elective	120316 Administer and Authorise Time Keeping Records for payroll purposes	Level 4	5	Draft - Prep for P Comment
Elective	12433 Use communication techniques effectively	Level 5	8	Registered
Elective	15223 Implement training needs for teams and individuals to upgrade skills levels	Level 5	3	Registered
Elective	15230 Monitor team members and measure effectiveness of performance	Level 5	4	Registered
Elective	118036 Assess and finalise credit application	Level 5	8	Registered
Fundamental	8968 Accommodate audience and context needs in oral communication	Level 3	5	Reregistered
Fundamental	8969 Interpret and use information from texts	Level 3	5	Reregistered
Fundamental	8970 Write texts for a range of communicative contexts	Level 3	5	Reregistered
Fundamental	9302 Access information in order to respond to client enquiries in a financial services environment	Level 3	2	Reregistered
Fundamental	9303 Communicate verbally with clients in a financial environment	Level 3	3	Reregistered
Fundamental	7468 Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	Level 4	6	Reregistered
Fundamental	8974 Engage in sustained oral communication and evaluate spoken texts	Level 4	5	Reregistered
Fundamental	8975 Read, analyse and respond to a variety of texts	Level 4	5	Reregistered
Fundamental	8976 Write for a wide range of contexts	Level 4	5	Reregistered
Fundamental	9015 Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	Level 4	6	Reregistered
Fundamental	9016 Represent, analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts	Level 4	4	Reregistered
Fundamental	12155 Apply comprehension skills to engage written texts in 2 business environment	Level 4	5	Reregistered



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UNIT STANDARD:

1

SAQA US ID	UNIT STANDARD TITLE		
120314	Administer Stock Control Records		
SGB NAME		ORGANISING FIELD ID	PROVIDER NAME
SGB Retail and Wholesale		11	
UNIT STANDARD TYPE	ORGANISING FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Services	Wholesale and Retail	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	10	Level 4	Regular

Explain how stock records affect the business.

SPECIFIC OUTCOME 2

Receipt and dispatch records are checked.

SPECIFIC OUTCOME 3

Sale records are checked.

SPECIFIC OUTCOME 4

Stock counts are checked.


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SAQA US ID	UNIT STANDARD TITLE		
120315	Control Administration in a Wholesale and Retail outlet		
SGB NAME	ORGANISING FIELD ID	PROVIDER NAME	
SGB Retail and Wholesale	11		
UNIT STANDARD TYPE	ORGANISING FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Services	Wholesale and Retail	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
Undefined	20	Level 4	Regular

SPECIFIC OUTCOME 1

Analyse and verify administration documentation.

SPECIFIC OUTCOME 2

Resolve identified discrepancies appearing on the administration documentation.

SPECIFIC OUTCOME 3

Manage finalisation of administrative documentation.



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UNIT STANDARD:

3

SAQA US ID	UNIT STANDARD TITLE		
120316	Administer and Authorise Time Keeping Records for payroll purposes		
SGB NAME	ORGANISING FIELD ID	PROVIDER NAME	
SGB Retail and Wholesale	11		
UNIT STANDARD TYPE	ORGANISING FIELD DESCRIPTION	SUBFIELD DESCRIPTION	
Regular	Services	Wholesale and Retail	
ABET BAND	CREDITS	NQF LEVEL	UNIT STANDARD TYPE
		4	ular

SPECIFIC OUTCOME 1

Check time keeping records for completeness.

SPECIFIC OUTCOME 2

Authorise short time and overtime.

SPECIFIC OUTCOME 3

Authorise time keeping records.