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APPENDIX A

ETHICAL CLEARANCE



NORTH-WEST UNIVERSITY
YUNIBESITHI YA BOKONE-BOPHIRIMA
NOORDWES-UNIVERSITEIT
INSTITUTIONAL OFFICE

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ETHICS APPROVAL OF PROJECT

This is to certify that the next project was approved by the NWU Ethics Committee:

Project title :

CREATING successful public schooling within a legal milieu.

Student/Project leader : Prof. Elda De Waal

Ethics number: NWU-0068-11-A9

Status: S = Submission; R = Re-Submission; P = Provisional Authorisation; A = Authorisation

Expiry date: 2016/08/30

The Ethics Committee would like to remain at your service as scientist and researcher, and wishes you well with your project.

Please do not hesitate to contact the Ethics Committee for any further enquiries or requests for assistance.

The formal ethics approval certificate will follow shortly.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Halgryn', written over a horizontal line.

HM Halgryn
NWU Research Ethics Secretariate

APPENDIX B

RESEARCH PERMISSION: GAUTENG DEPARTMENT OF EDUCATION



UMnyango WezeMfundo
Department of Education

Lefapha la Thuto
Departement van Onderwys

Enquiries: Nomvula Ubisi (011)3550488

Date:	10 March 2010
Name of Researcher:	Molete Lebohang
Address of Researcher:	7549 Zwane Street
	Sharpville
	Vereeniging
Telephone Number:	0115595654/0785359757
Fax Number:	0169107811
Research Topic:	Managing the Design and Implementation of Common Task Assessment in Sedibeng -East (D7) Schools and Sedibeng -West Schools(D8)
Number and type of schools:	Secondary Schools
District/s/HO	Sedibeng East

Re: Approval in Respect of Request to Conduct Research

This letter serves to indicate that approval is hereby granted to the above-mentioned researcher to proceed with research in respect of the study indicated above. The onus rests with the researcher to negotiate appropriate and relevant time schedules with the school/s and/or offices involved to conduct the research. A separate copy of this letter must be presented to both the School (both Principal and SGB) and the District/Head Office Senior Manager confirming that permission has been granted for the research to be conducted.

Permission has been granted to proceed with the above study subject to the conditions listed below being met, and may be withdrawn should any of these conditions be flouted:

- 1. The District/Head Office Senior Manager/s concerned must be presented with a copy of this letter that would indicate that the said researcher/s has/have been granted permission from the Gauteng Department of Education to conduct the research study.*
- 2. The District/Head Office Senior Manager/s must be approached separately, and in writing, for permission to involve District/Head Office Officials in the project.*
- 3. A copy of this letter must be forwarded to the school principal and the chairperson of the School Governing Body (SGB) that would indicate that the researcher/s have been granted permission from the Gauteng Department of Education to conduct the research study.*

Office of the Chief Director: Information and Knowledge Management
Room 501, 111 Commissioner Street, Johannesburg, 2000 P.O.Box 7710, Johannesburg, 2000
Tel: (011) 355-0809 Fax: (011) 355-0734

4. A letter / document that outlines the purpose of the research and the anticipated outcomes of such research must be made available to the principals, SGBs and District/Head Office Senior Managers of the schools and districts/offices concerned, respectively.
5. The Researcher will make every effort obtain the goodwill and co-operation of all the GDE officials, principals, and chairpersons of the SGBs, teachers and learners involved. Persons who offer their co-operation will not receive additional remuneration from the Department while those that opt not to participate will not be penalised in any way.
6. Research may only be conducted after school hours so that the normal school programme is not interrupted. The Principal (if at a school) and/or Director (if at a district/head office) must be consulted about an appropriate time when the researcher/s may carry out their research at the sites that they manage.
7. Research may only commence from the second week of February and must be concluded before the beginning of the last quarter of the academic year.
8. Items 6 and 7 will not apply to any research effort being undertaken on behalf of the GDE. Such research will have been commissioned and be paid for by the Gauteng Department of Education.
9. It is the researcher's responsibility to obtain written parental consent of all learners that are expected to participate in the study.
10. The researcher is responsible for supplying and utilising his/her own research resources, such as stationery, photocopies, transport, faxes and telephones and should not depend on the goodwill of the institutions and/or the offices visited for supplying such resources.
11. The names of the GDE officials, schools, principals, parents, teachers and learners that participate in the study may not appear in the research report without the written consent of each of these individuals and/or organisations.
12. On completion of the study the researcher must supply the Director: Knowledge Management & Research with one Hard Cover bound and one Ring bound copy of the final, approved research report. The researcher would also provide the said manager with an electronic copy of the research abstract/summary and/or annotation.
13. The researcher may be expected to provide short presentations on the purpose, findings and recommendations of his/her research to both GDE officials and the schools concerned.
14. Should the researcher have been involved with research at a school and/or a district/head office level, the Director concerned must also be supplied with a brief summary of the purpose, findings and recommendations of the research study.

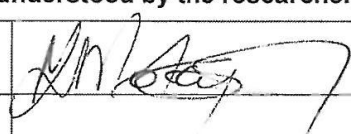
The Gauteng Department of Education wishes you well in this important undertaking and looks forward to examining the findings of your research study.

Kind regards

Pp Nomvula Ubisi

Martha Mashego

ACTING DIRECTOR: KNOWLEDGE MANAGEMENT & RESEARCH

The contents of this letter has been read and understood by the researcher.	
Signature of Researcher:	
Date:	12 MARCH 2010

APPENDIX C

RESEARCH PERMISSION: DISTRICTS

The District Director D7
Department of Education
Vereeniging
1930

7549 Zwane Street
Sharpeville
Vereeniging
1928
17 February 2011

Dear Madam/Sir

**RE: REQUEST FOR PERMISSION TO CONDUCT RESEARCH PROJECT
AT DISTRICT 7 SCHOOLS**

I am Anna Lebohang Molete, a lecturer at the University of Johannesburg. I am studying towards a (PhD) Doctorate degree at the North-West University, Vaal Triangle Campus. The topic of my thesis is *Managing the quality of the design and implementation of Common Task Assessment in Sedibeng-East and Sedibeng-West schools*. In the context of this study, the researcher has identified your district to obtain data.

The ethical issues in conducting research will be maintained. The research results will be made available on request.

I humbly request permission to conduct my research before the fourth term: the research will be conducted at times that suit the principals at the respective schools.

Thank you in anticipation.

Yours faithfully

Anna Lebohang Molete

Contact numbers: (011) 559 5657/ 078 5359757

e-mail: almolete@uj.ac.za

The District Director D8
Department of Education
Vereeniging
1930

7549 Zwane Street
Sharpeville
Vereeniging
1928
17 February 2011

Dear Madam/Sir

**RE: REQUEST FOR PERMISSION TO CONDUCT RESEARCH PROJECT
AT DISTRICT 8 SCHOOLS**

I am Anna Lebohang Molete, a lecturer at the University of Johannesburg. I am studying towards a (PhD) Doctorate degree at the North-West University, Vaal Triangle Campus. The topic of my thesis is *Managing the quality of the design and implementation of Common Task Assessment in Sedibeng-East and Sedibeng-West schools*. In the context of this study, the researcher has identified your district to obtain data.

The ethical issues in conducting research will be maintained. The research results will be made available on request.

I humbly request permission to conduct my research before the fourth term: the research be conducted at times that suit the principals at the respective schools.

Thank you in anticipation.

Yours faithfully

Anna Lebohang Molete

Contact numbers: (011) 559 5657/ 078 5359757

e-mail: almolete@uj.ac.za



education

Department: Education
GAUTENG PROVINCE

Enq: Moeketsane VC
Tel: 016 440 1905
Fax: 016 440 1850
vangile.moeketsane@gauteng.gov.za
Ref no: P, P&DISM 0061/2011

SEDIBENG EAST DISTRICT

TO : MS. ANNA LEBOHANG MOLETE
UNIVERSITY OF JOHANNESBURG

FROM : MS. MOLOI DORAH
DISTRICT DIRECTOR

DATE : 12 MAY 2011

SUBJECT : REQUEST FOR PERMISSION TO CONDUCT RESEARCH
PROJECT AT DISTRICT 7 SCHOOLS

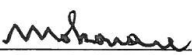
I acknowledge receipt of your communiqué dated 02 March 2011, which refers to the subject above.

It is noted that the scope of your research centres on managing design and implementation of Common Task Assessment (CTA) which was discontinued in 2010. It will be advisable therefore to have experienced educators who were in the system prior to the year 2010 as the subjects of your research.

Permission is granted that you conduct research in the public secondary schools that offer EMS within Sedibeng East district. However, the process must under no circumstances interfere with teaching and learning times.

I wish you well in your studies.

Regards


Ms. Dorah Moloi
District Director: Sedibeng East
Date: 12/05/2011

Making education a societal priority

OFFICE OF THE DISTRICT DIRECTOR: SEDIBENG EAST
14 Joubert Street, S, L & M Building, Vereeniging
Private Bag X05, Vereeniging, 1930. Tel: (016) 4401700 Fax: (016) 440
E-mail: Dorahm2@gpg.gov.za
Website: www.education.gpg.gov.za
GPS Coordinates: S26° 40.299' E27° 55.633'



education
Department: Education
GAUTENG PROVINCE

Enquiries: M.J Sithole
Tel: (016) 594 9210

Ms Molete Lebohang
7549 Zwane Street
Sharpville

RE: PERMISSION TO CONDUCT RESEARCH IN SEDIBENG WEST DISTRICT

The Sedibeng West District hereby grants permission to conduct research in its schools as per conditions stipulated on the approval letter from Head Office.

Research Topic : Managing the Design and the Implementation of Common Task Assessment
In Sedibeng East and West Schools

The District wishes you success in y our academic pursuit.

Regards

Mr BV Thetha
District Director

Date: 08/05/2012

Making education a societal priority

Office of the District Director: Sedibeng West District

NO 6 Samuel Street
Sebokeng College of Education
Zone 18 Sebokeng
1983
Tel: (016) 594 9120

Private Bag X067
Vanderbijlpark
1900

Fax: 016 594 9399

APPENDIX D

LETTER TO PRINCIPALS

7549 Zwane Street
Sharpeville
Vereeniging
1928
15 March 2010

Dear Principal

RE: REQUEST TO CONDUCT RESEARCH

I am currently studying for a PhD in Education Management in the school of Educational Sciences at North-West University Vaal campus. I therefore seek your permission to conduct research at your school entitled “Managing the design and the implementation of Common Task Assessment (CTA) in Sedibeng-East and Sedibeng-West Schools.” The purpose of this research is to try to understand the perception of learners and educators with regard to the design, implementation and management of Common Task Assessment.

This research involves the completion of questionnaires by educators and learners. The findings from this research will be used in writing my thesis. Confidentiality and anonymity will be maintained.

All the EMS educators, HODs, learners and principals’ perceptions are relevant to the study. Please be informed that the participation is voluntary and the participants are free to withdraw at any time should they feel to do so. The benefits derived from this research will be reaped by your school, examiners and national curriculum developers.

This study is supervised by Prof. Elda De Waal. Tel: (016) 910-3077 or E-mail at elda.dewaal@nwu.ac.za.

My contact details: Tel: (011)559-5654. Cell: 0785359757 or 0837666807

Your positive response will be highly appreciated.

APPENDIX E

CONSENT FORM: PARENTS

7549 Zwane Street
Sharpeville
Vereeniging
1928
5 April 2011

Dear Parent/Caretaker

I am busy with a research study for my PhD-degree. I need your permission to involve (Name of learner) as participant in my study in order to complete the study. This document will provide you with information regarding the project and what the learners' involvement will entail. If you feel comfortable with the contents of the explanation, I will appreciate it if you could sign indicating your consent that he/she may take part in the study.

No programme exists to support the design and the management of Common Task Assessment (CTA) at Sedibeng-West and Sedibeng-East schools. I am approaching the learners personally to ask for their permission to take part in the study. Participation will not be compulsory and the learners may withdraw at any time should they feel uncomfortable. I would like to hand out a questionnaire to each Grade 9 EMS learner. The questionnaire takes 25-30 minutes to complete.

There are no direct benefits for taking part in the study. The designed intervention management plan may assist may the learners to benefit from excellent designed assessment which meets their cognitive abilities. The designers of EMS CTA will also benefit from the input of learners on how CTA should be designed.

CONFIDENTIALITY: The completed questionnaires of the learners will be kept confidentially by the researcher. I hereby request to utilize the data obtained during this research for publication purposes.

I am conducting my research under the supervision of Prof. Elda de Waal from the school of Educational Sciences, North-West University (Vaal Triangle Campus). If you have any queries, you can contact her at (016) 910-3077.

CONSENT:

I (full name of parent/caretaker) have read and understand the nature of the participation in the project and agree that (name of the learner) may participate

APPENDIX F

CONSENT FORM: LEARNERS

7549 Zwane Street
Sharpeville
Vereeniging
1928
5 April 2011

INFORMED CONSENT (LEARNER)

Dear Learner

I am busy with a research study for my PhD-degree. I would like to ask your permission to take part in my study. If you feel comfortable with the contents of my explanation, I will appreciate it if you could sign the part indicating that you agree to take part.

No programme exists to support the design and the management of Common Task Assessment (CTA) at Sedibeng-West and Sedibeng-East schools. I am approaching you personally to ask for your permission to take part in the study. Participation will not be compulsory. You may withdraw any time you like or when you feel uncomfortable. The questionnaire is based on EMS CTA and takes 25-30 minutes to complete.

There are no direct benefits to taking part in the study. My designed management plan may assist may in future help the learners in future to benefit from excellently designed assessment to meet everyone's cognitive abilities.

CONFIDENTIALITY: I will treat the information that you complete on the questionnaires with confidence. I will not mention any names when I report the information of this research. I hereby ask if I may use the data obtained for publishing an article or two.

My name is Anna Lebohang Malapo (Lebo) and I am a student of Professor Elda de Waal from the North-West University (Vaal Triangle Campus). If you have any queries you can contact her (016) 910-3077.

CONSENT:

I (your name) have read and understand the nature of my participation in the study. I agree that I will take in the study.

APPENDIX G

CONSENT FORM: EDUCATORS

TO: Educators

From: Anna Lebohang Malapo

Re: REQUEST FOR COMPLETION OF QUESTIONNAIRES WITH REGARD TO THE

Dear Educator

I am a student at the North-West University, Vaal Triangle campus and am studying towards a PhD in education management. The topic is *Managing the quality of the design and implementation of Common Task Assessment in Sedibeng-East and Sedibeng-West schools*. I am conducting my research at Sedibeng-East and Sedibeng-West secondary schools.

I would therefore like to request you be one of the participants in my research. Participation is not compulsory. It is voluntary. However, I would appreciate your contribution to my study. Should you wish to participate, please complete the attached consent form. The completion of questionnaires will take more or less fifteen to twenty minutes. Your credentials will not be disclosed. Moreover, data collection will be treated with confidentiality.

Thank you in anticipation.

Yours faithfully

Anna Lebohang Malapo

Contact numbers: (011) 559 5657/ 078 5359757

e-mail: almolete@uj.ac.za

CONSENT:

I (full name of educator) have read and understand the nature of the participation in the project and agree that to participate

APPENDIX H

EDUCATOR QUESTIONNAIRE

QUESTIONNAIRE FOR EDUCATORS

Managing the quality of the design and implementation of Common Task Assessment at Sedibeng-East (7) and Sedibeng-West Schools (D8)

Dear Educator

I am currently busy with a PhD-degree at the North-West University, Vaal Triangle Faculty. Your help in completing this questionnaire would be highly appreciated. When answering the questionnaire items, please try to be as objective as possible, since the aim is to gather information concerning the degree to which you have knowledge about the design and implementation of the EMS CTA at your school.

Your time, effort and cooperation are held in high esteem.

Ms AL Molete

INSTRUCTIONS

1. You are kindly requested to answer all the questions to the best of your ability.
2. Do not indicate your name or the name of your school on the document.
3. Please complete the questionnaire on your own.
4. Kindly read this questionnaire very carefully and then indicate your choice either by marking a cross (X) or by completing the questions briefly in writing.

SECTION A: Biographic information

A1	Gender	Male	Female			
A2	Age	20-30 years	31-40 years	41-50 years	51+ years	
A3	Highest qualification	Certificate in Education	Diploma in Education	Degree outside Education	Degree in Education	Other Please specify
A4	Teaching experience	Below 5 years	5-10 years	11-15 years	Above 15 years	
A5	Present position	Principal	Deputy principal	Head of Department	Educator	
A6	Experience in present post	Less than 5 years	5-10 years	11-15 years	More than 15 years	

SECTION B: Design of the CTA

Please indicate the extent to which you agree or disagree with the following statements concerning the design of the EMS Common Task Assessment (CTA) by marking the appropriate block with an X:

		Agree strongly	Agree	Disagree	Disagree strongly
B7	Educators were				
	• consulted in the design of the EMS	1	2	3	4
	• involved in the design of the EMS CTA	1	2	3	4
B8	Assessment standards were correctly reflected in the EMS CTA	1	2	3	4
B9	Section A was relevant to Section B	1	2	3	4
B10	The content of the CTA				
	• was in line with the EMS learning programme	1	2	3	4
	• covered all the themes	1	2	3	4
B11	Time was properly allocated for				
	• completing the EMS CTA Section A	1	2	3	4
	• completing the EMS CTA Section B	1	2	3	4
B12	The EMS CTA considered learners' socio-economic status concerning resources	1	2	3	4
B13	Learners were consulted with regard to the design of the assessment tasks in the EMS CTA	1	2	3	4
B14	The EMS CTA encourages teamwork among educators	1	2	3	4
B15	The EMS CTA gathers reliable information about learners' performance against...				
	• clearly defined criteria while using...	1	2	3	4
	• a variety of assessment methods	1	2	3	4
	• tools	1	2	3	4

	Agree strongly	Agree	Disagree	Disagree strongly
• techniques	1	2	3	4
• contexts	1	2	3	4
B16 The EMS CTA measures	1	2	3	4
• content	1	2	3	4
• skills	1	2	3	4
• applications	1	2	3	4
• understanding	1	2	3	4
B17 The assessors of EMS CTA:	1	2	3	4
• mark some scripts	1	2	3	4
• convene to discuss assessment criteria with the district facilitator and peers	1	2	3	4
• make adjustments to the marks	1	2	3	4
• follow reliable approaches for moderation	1	2	3	4
B18 To ensure greater reliability, the CTA assessment is marked by two assessors, which is called double marking	1	2	3	4
B19 The assessment tasks in the CTA:	1	2	3	4
• involve real-life challenges	1	2	3	4
• require of learners to apply relevant skills	1	2	3	4
• require of learners to apply relevant knowledge	1	2	3	4
• provide learners with multiple assessment opportunities	1	2	3	4
B20 The EMS CTA indicates:	1	2	3	4
• the level of performance expected from Grade 9 learners	1	2	3	4
• the setting of task criteria which are made explicit to the learners	1	2	3	4
B21 The EMS CTA caters for learners with learning barriers	1	2	3	4

	Agree strongly	Agree	Disagree	Disagree strongly
B22 The EMS CTA is designed to cater for learners' different cognitive abilities	1	2	3	4
B23 The language for EMS CTA is aimed at home language speakers	1	2	3	4

SECTION C: Implementation of the CTA

Please indicate the degree to which you agree or disagree with the following statements concerning the implementation design of the EMS Common Task Assessment (CTA) by marking the appropriate block with an X:	Agree strongly	Agree	Disagree	Disagree strongly
C24 The time allocated for the implementation of the EMS CTA was adequate for preparing the learners	1	2	3	4
C25 Educators were	1	2	3	4
• involved in the implementation of the EMS CTA				
• consulted by the EMS CTA designer during the implementation process	1	2	3	4
C26 Educators managed the quality of the implementation process of the EMS CTA	1	2	3	4
C27 Large classes could be managed during the implementation of the EMS CTA	1	2	3	4
C28 Management plans to guide the implementation process were given to educators in time	1	2	3	4
C29 Educators' portfolios were	1	2	3	4
• duly completed				
• duly sent for moderation	1	2	3	4
C30 Learners' portfolios were	1	2	3	4
• duly completed				
• duly sent for moderation	1	2	3	4

Please indicate the degree to which you agree or disagree with the following statements concerning the implementation design of the EMS Common Task Assessment (CTA) by marking the appropriate block with an X:	Agree strongly	Agree	Disagree	Disagree strongly
C31 The Gauteng Department of Education (GDE) familiarized School Management Teams (SMTs) with regard to supporting educators during the implementation of the EMS CTA	1	2	3	4
C32 Our school gave learners access to:	1	2	3	4
• computer laboratories with Internet after school hours	1	2	3	4
• library facilities after school hours	1	2	3	4
C33 All SMTs were provided with training on the moderation process of the EMS CTA	1	2	3	4
C34 Information was timeously communicated on how to manage the implementation process	1	2	3	4
C35 The prescribed number of assessments were completed	1	2	3	4
C36 A registration procedure was followed for the EMS CTA	1	2	3	4
C37 The promotional requirements for Grade 9 were applied in accordance with provincial regulations	1	2	3	4

C38 Did your school have sufficient resources to implement the EMS CTA? If any resources were needed, please specify them.

YES	NO
-----	----

C39 Training was provided by the Gauteng Department of Education (GDE) on management responsibilities of educators for the implementation of the EMS CTA

YES	NO
-----	----

C40 A national time table was followed.

YES	NO
-----	----

If your answer is *NO*, please state why it was not followed.

C41 Is the EMS CTA an appropriate instrument to assess learners? Motivate your answer briefly.

YES	NO
-----	----

C42. Indicate the challenges below which applied to your school during the implementation of the EMS CTA by marking the appropriate block with a cross (X):

Challenges	Applicable
1. Too much administration	
2. Late arrival of CTAs from district offices	
3. Learner absenteeism	
4. CTA language too difficult for learners	
5. Section B and A not relevant to each other	
6. Classroom overcrowding	
7. Lack of resources	
8. Learners not doing their own work	
9. Unfinished tasks submitted	
10. Time allocated for the CTA was insufficient	

SECTION D: Assessment policy

Indicate, by marking the appropriate block with a cross (X), on the seven point semantic scale the position that best describes the extent to which you are familiar with the following statements related to the assessment policy of your school:

Statements	Semantic scale								
D43 There is an approved school policy for the assessment of NCS Grade 9	Familiar	1	2	3	4	5	6	7	Unfamiliar
D44 The policy provides for the administration of <i>internal assessment</i>	Familiar	1	2	3	4	5	6	7	Unfamiliar
D45 The policy provides for the administration of <i>practical assessment</i>	Familiar	1	2	3	4	5	6	7	Unfamiliar
D46 The policy covers monitoring of <i>internal assessment</i>	Familiar	1	2	3	4	5	6	7	Unfamiliar
D47 The policy covers monitoring of <i>practical assessments</i>	Familiar	1	2	3	4	5	6	7	Unfamiliar

SECTION E: Administration of internal assessment

E48 What recommendations do you have for the improvement of the administration of internal assessment?

E49 What recommendations do you have for the improvement of the quality of internal assessment tasks?

SECTION F: Administration of internal *practical* assessment

F50 Where were the practical assessments conducted? (Practicum room / simulated work place room)

F51 What challenges were experienced in the administration of the practical assessment of EMS?

F52 What recommendation do you have for the improvement of the administration of practical assessments?

F53 List the issues that could compromise the credibility of the CTA marks.

F54 What recommendations do you have for the improvement of the quality of the CTA?

F55 What recommendations do you have for the improvement of managing the CTA?

APPENDIX I

LEARNER QUESTIONNAIRE



QUESTIONNAIRE FOR LEARNERS

Managing the quality of the design and implementation of Common Task Assessment at Sedibeng-East and Sedibeng-West schools

Dear Learner

I am currently busy with a PhD-degree at the North-West University, Vaal Triangle Faculty. Your help in completing this questionnaire would be highly appreciated. When answering the questionnaire items, please try to be as objective as possible, since the aim is to gather information concerning the degree to which you have knowledge about the design and implementation of the EMS Common Task Assessment (CTA) at Grade 9 level.

Your time, effort and cooperation are held in high esteem.

Ms AL Molete

INSTRUCTIONS

1. You are kindly requested to answer all the questions to the best of your ability.
2. Do not indicate your name or the name of your school on the document.
3. Please complete the questionnaire on your own.
4. Kindly read this questionnaire very carefully and then indicate your choice either by marking a cross (X) or by completing the last three questions briefly in writing.

SECTION A: Biographic information

A1	Gender	Male	Female
----	--------	------	--------

A2	Age	13-14 years	15-16 years	17-18 years	19-20 years	Above 20 years
----	-----	-------------	-------------	-------------	-------------	----------------

A3	The area where you live	Township	Suburb
----	-------------------------	----------	--------

A4	Language of communication at home	English First Language	English Second Language	Afrikaans First Language	Afrikaans Second Language	African language
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SECTION B: Design of the CTA

Please indicate the degree to which you agree or disagree with the following statements concerning the design of the EMS Common Task Assessment (CTA) by marking the appropriate block with an X.

Mark your choice in each line, please		Agree strongly	Agree	Disagree	Disagree strongly
B5	I was given enough time to prepare myself for the EMS CTA	1	2	3	4
B6	The content of the EMS CTA included identifying:	1	2	3	4
	• factual knowledge				
	• how we apply the content in real life	1	2	3	4
B7	We as learners	1	2	3	4
	• had a say in the design of the CTA				
	• were involved in the design of the CTA	1	2	3	4
B8	My EMS CTA workbook was user-friendly	1	2	3	4
B9	There was a connection between Section A and Section B of the CTA	1	2	3	4
B10	The content of the CTA was in line with what we were taught in EMS	1	2	3	4
B11	We had enough time:	1	2	3	4
	• to complete the EMS CTA Section A				
	• to complete the EMS CTA Section B	1	2	3	4
B12	I had access to resources to complete the EMS CTA	1	2	3	4
B13	The content of the EMS CTA included connecting:	1	2	3	4
	• factual knowledge				
	• applications	1	2	3	4
B14	The EMS CTA encourages teamwork among learners	1	2	3	4
B15	I knew the criteria against which my performance was going to be assessed	1	2	3	4

Mark your choice in each line, please	Agree strongly	Agree	Disagree	Disagree strongly
B16 The EMS CTA measured	1	2	3	4
• how much I know	1	2	3	4
• how I apply my skills	1	2	3	4
• how well I understand the subject	1	2	3	4
B17 The EMS CTA tasks were challenging	1	2	3	4
B18 The assessment tasks in the CTA:	1	2	3	4
• involved real-life situations	1	2	3	4
• required of us to apply relevant skills	1	2	3	4
• required of us to show how much we know	1	2	3	4
• gave us many assessment opportunities	1	2	3	4
B19 The EMS CTA catered for learners with learning disabilities	1	2	3	4
B20 The EMS CTA catered for the different cognitive abilities of all learners (average, gifted and slow learners)	1	2	3	4
B21 The language used in the EMS CTA was at the level of Grade 9 learners	1	2	3	4

SECTION C: Implementation of the CTA

Please indicate the degree to which you agree or disagree with the following statements concerning the implementation of the EMS Common Task Assessment (CTA) by marking the appropriate block with an X:

Mark your choice in each line, please	Agree strongly	Agree	Disagree	Disagree strongly
C22 I had enough time to prepare for writing the EMS CTA	1	2	3	4
C23 Educators familiarized us with the activities of Section A of the EMS CTA	1	2	3	4

Mark your choice in each line, please		Agree strongly	Agree	Disagree	Disagree strongly
C24	Educators assisted us in answering some questions in Section A of the EMS CTA	1	2	3	4
C25	Educators could manage our large classes during the implementation of the CTA	1	2	3	4
C26	Educators gave us time-plans during the implementation process to prepare ourselves	1	2	3	4
C27	We were not allowed to take question papers home for Section A	1	2	3	4
C28	Our portfolios were:	1	2	3	4
	• completed on time				
	• sent for moderation on time	1	2	3	4
C29	My school had enough material to do the EMS CTA	1	2	3	4
C30	At my school I had access to:	1	2	3	4
	• the Internet after school hours				
	• library facilities after school hours	1	2	3	4
C31	We were asked to bring material, such as magazines, from home	1	2	3	4
C32	The EMS CTA provided learners with:	1	2	3	4
	• relevant educational experiences				
	• greater motivation to learn	1	2	3	4
C33	I will be able to apply the content of the EMS CTA Section A in a real-life situation	1	2	3	4
C34	I was familiar with the content of the EMS CTA	1	2	3	4

Mark your choice in each line, please	Agree strongly	Agree	Disagree	Disagree strongly
C35 Section A of the EMS CTA was marked by:	1	2	3	4
• my educators	1	2	3	4
• my fellow learners	1	2	3	4
• me	1	2	3	4
C36 The CTA was a good instrument to assess us for external examination	1	2	3	4
C37 I could work with other learners in completing the assessment tasks	1	2	3	4

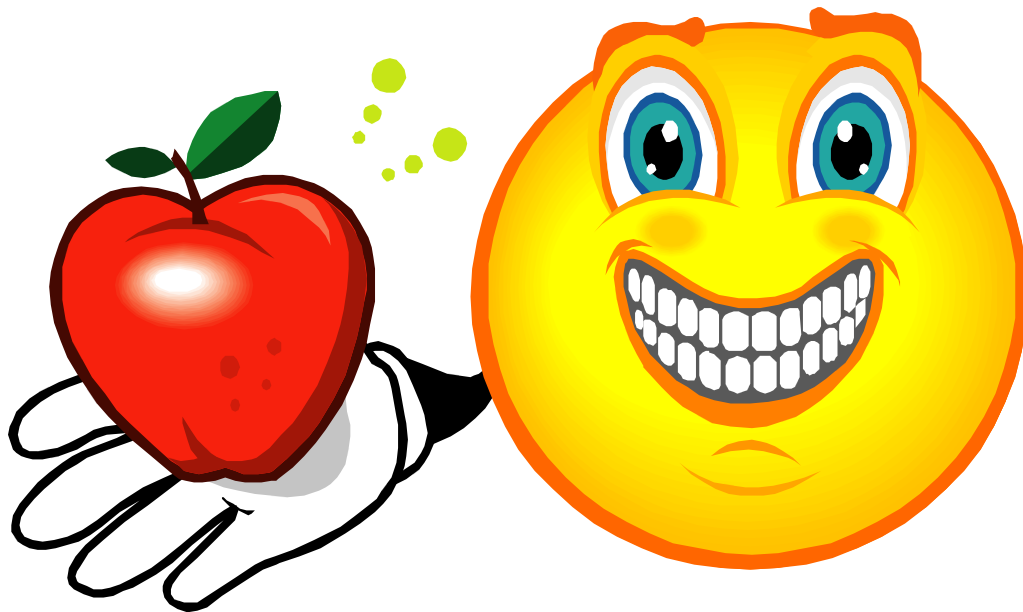
C38 Indicate which of the challenges below happened at your school during the implementation of the EMS CTA, by marking those things that happened at your school with a cross (X):

Challenges	This happened
1. Educators gave unclear instructions	
2. Tasks were not applicable to real-life situations	
3. Learners were absent	
4. The CTA language was too difficult	
5. Learners did not work together during group work	
6. No time for individual attention to learners' problems	
7. Lack of resources to complete tasks	
8. The CTA pace was too fast	
9. Unfinished tasks were handed in	
10. The time given to us was not enough	

C39 What type of assessment activities would you like to include in the CTA?

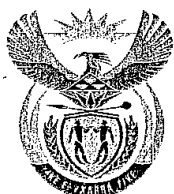
C40 What did you find difficult in completing the CTA assessment tasks?

C41 What would you like to change about the CTA?



APPENDIX J

EMS CTA LEARNER QUESTION PAPER 2009



education

Department:
Education
REPUBLIC OF SOUTH AFRICA

COMMON TASK ASSESSMENT (CTA)

GRADE 9 – 2009

ECONOMIC AND MANAGEMENT SCIENCES

LEARNER'S BOOK

SECTION A

Theme: General Elections – 2009

Name of Learner: _____

Suggested Time: 4 hours

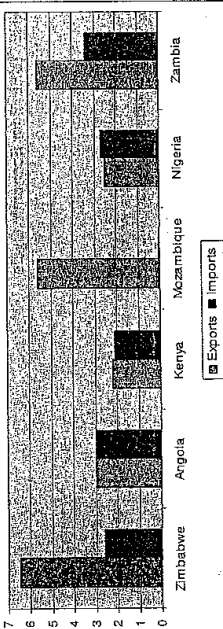
160 marks

No of pages: 36

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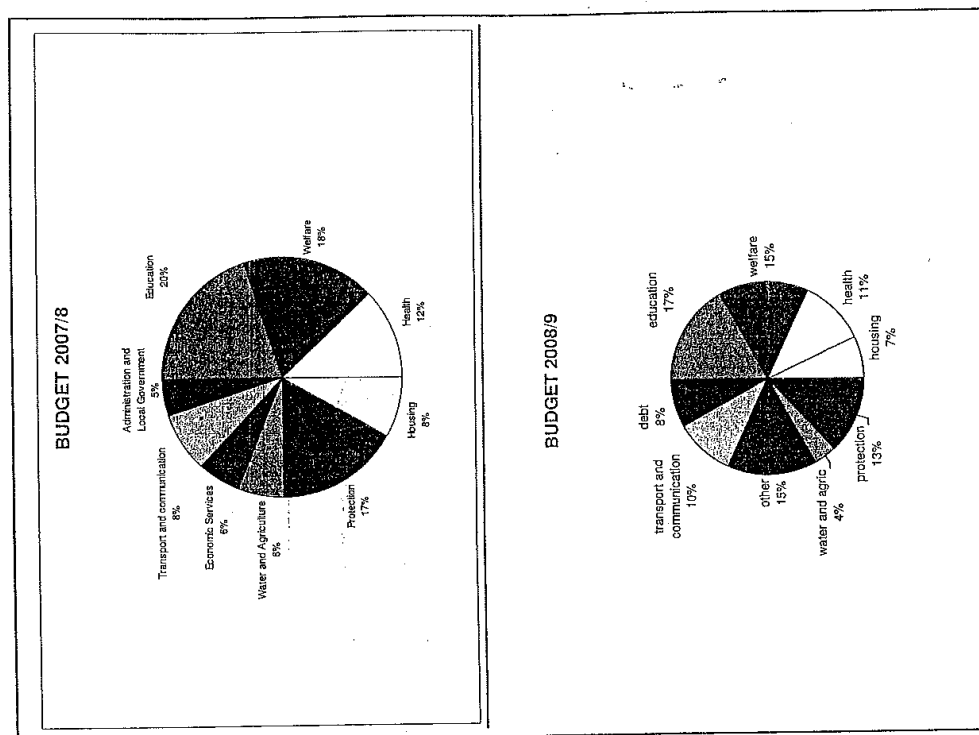
Task 1	
1.1 The flow of money within the economic cycle	3
1.2 The role of the foreign sector in the economic cycle	4
1.3 Supply and Demand curves	5
Task 2	
2.1 Government spending and the RDP	6
Task 3	
3.1 Accounting and Financial terminology	10
3.2 Income Statement	12
3.3 Balance Sheet	14
3.4 Methods of payment in the economy	16
Task 4	
4.1 Promoting entrepreneurship, marketing and planning	17
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B. Sustainable Growth and Development	22
C. Managerial, Consumer and Financial Knowledge and Skills	26
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G. Balance Sheet Template	30
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TASK 1	LO1: AS1,2 & 3	TIME: 45	TOTAL MARKS 40
Activity 1.1	LO1: AS 1 & 2		
The flow of money within the economic cycle of South Africa			
Group Work and Individual Activity	Time: 15min	Marks: 16	
Form of Assessment: Written Presentation	Assessment Tool: Memorandum		
In this activity you are going to be assessed on your ability to interpret and analyse The Economic Cycle.			
Before you start working on this task you must read Annexure A which is a summary on The Economic Cycle.			
In a market economic system, money flows (moves) between the government, businesses, households and the other countries in the world (foreign sector). The diagram below shows the circular flow of money in the South African economy (the economic cycle). In your group carefully study the diagram and jot down your group's responses. Go back to your seat and complete the activity on your own.			
See ANNEXTURE F for Economic Cycle			
1.1.1 In your own words explain the role of government, businesses, the foreign sector, and households in the economic cycle.			(12)
1.1.2 What are the resources that households provide?			(4)

TASK 1	LO1: AS1.2 & 3	TIME: 45	TOTAL MARKS 40																					
Activity 1.2 LO1: AS 2																								
The role of the foreign sector in the economic cycle of South Africa																								
Paired Activity		Time: 15min	Marks: 12																					
Form of Assessment: Written Presentation		Assessment Tool: Memorandum																						
In this activity you are going to be assessed on your understanding of the importance of foreign trade and your ability to interpret graphs																								
Foreign Trade																								
South Africa has trading partners and trade agreements all over the world with countries in Europe, North and South America, Asia, the Middle East, Australia and Africa. South Africa is also part of the Southern African Development Community (SADC). Refer to Annexure B for more information on SADC.																								
1.2.1 Briefly explain foreign trade. (1)																								
1.2.2 What are the main goals of SADC? (2)																								
1.2.3 Study the bar graph below which show some of South Africa's most important trading partners.																								
<div><p style="text-align: center;">South Africa's Imports and Exports in the SADC Region in Billions</p><table border="1"><thead><tr><th>Country</th><th>Exports (Billions)</th><th>Imports (Billions)</th></tr></thead><tbody><tr><td>Zimbabwe</td><td>6.5</td><td>5.5</td></tr><tr><td>Angola</td><td>4.5</td><td>3.5</td></tr><tr><td>Kenya</td><td>3.5</td><td>2.5</td></tr><tr><td>Mozambique</td><td>2.5</td><td>1.5</td></tr><tr><td>Nigeria</td><td>1.5</td><td>0.5</td></tr><tr><td>Zambia</td><td>0.5</td><td>0.5</td></tr></tbody></table></div>				Country	Exports (Billions)	Imports (Billions)	Zimbabwe	6.5	5.5	Angola	4.5	3.5	Kenya	3.5	2.5	Mozambique	2.5	1.5	Nigeria	1.5	0.5	Zambia	0.5	0.5
Country	Exports (Billions)	Imports (Billions)																						
Zimbabwe	6.5	5.5																						
Angola	4.5	3.5																						
Kenya	3.5	2.5																						
Mozambique	2.5	1.5																						
Nigeria	1.5	0.5																						
Zambia	0.5	0.5																						
1.2.3.1 Which countries are the biggest export markets for South Africa? (2)																								
1.2.3.2 Why do you think these countries are South Africa's biggest export markets? (2)																								
1.2.3.3 Explain how South Africa benefits from its foreign trade? (5)																								

TASK 1	LO1: AS1,2, & 3	TIME: 45	TOTAL MARKS 40
Activity 1.3 LO1: AS 3 The influence of supply and demand on prices			
Individual Activity		Time: 15min	Marks: 12
Form of Assessment: Written Presentation		Assessment Tool: Memo	
This activity will assess your ability to draw and interpret the demand and supply graphs.			
The Supply and Demand Graphs			
1.3.1 Use the information given in the table below to draw (plot) the demand and supply curves. Draw both curves (graphs) on the same graph to show the effects of supply and demand on prices. Indicate the equilibrium price (E) on your graph. (7)			
Your teacher will supply you with graph paper to draw your graph.			
Price of peaches per box		Quantity Consumers demand per week	Quantity Business prefer to supply per week
R15		10	25
R14		12	20
R12		15	15
R10		20	12
R8		25	10
1.3.2 Interpret the graph in your own words and explain the law of demand and the law of supply. (5)			

TASK 2	LO1: AS5; LO2: AS1,2,3 & 4	TIME: 60	TOTAL MARKS 30
Activity 2.1 LO1: AS5; LO2: AS1,2,3 & 4 Sustainable growth, reconstruction and development			
Group / Individual Activity	Time: 60min	Marks: 30	
Class discussion and preparation time: 60min.			
Form of Assessment: Written Presentation	Assessment Tool: Rubric		
This activity will assess your ability to:			
<ol style="list-style-type: none">1. interpret and explain how government spends its resources to facilitate sustainable growth and development;2. critically analyse and comment on the success and shortcomings of the RDP and3. explain the role of investments in economic growth and prosperity.			
Sustainable Growth and Development			
Please read <u>Annexure B</u> to get a brief background on Sustainable Growth and Development before doing this task.			
We have just had our fourth general elections . In this task we will look at governments' priorities in terms of the Reconstruction and Development Programme (RDP) developed by the first government of national unity to address the inequalities of the past			
The Vision of Government in terms of the RDP identified the following four key areas:			
<ol style="list-style-type: none">1. Meeting basic needs2. Developing our human resources3. Building the economy4. Democratising the state and society			
The National Budgets for 2007/2008 and 2008/2009 are on page 5.			



Instructions

Your group must write an article for your community newspaper on how the government plans to spend the tax payer's money. Your article must not be more than 350 words.

Your article must include:

1. An analysis of the changes in government spending between the budgets of 2007/2008 and 2008/2009 with regards to Education, Health, Welfare and Housing.
2. A list of four areas where the government has achieved its goals.
(Refer to Annexure B).
3. An assessment of whether the budget caters for the four key programme areas of the RDP?
4. An explanation of the importance of Education for economic growth and development.
5. An evaluation of whether the budget promotes economic growth in terms of job creation and promoting investments?
6. A list of factors that can discourage economic growth in South Africa and how the government can overcome this.
7. What ordinary people can do in their daily lives to promote economic growth and prosperity in South Africa?

RUBRIC TO ASSESS TASK 2: The National Budget and Government Spending

7	6	5	4	3	2	1
Outstanding achievement 80-100%	Meritorious achievement 70-79%	Substantial achievement 60-69%	Adequate achievement 50-59%	Moderate achievement 40-49%	Elementary achievement 30-39%	Not achieved 0-29%
24-30 marks	21-23 marks	18-20 marks	15-17 marks	12-14 marks	8-11 marks	0-8 marks
Well written and of correct length. Demonstrated excellent understanding of government spending and priorities.	Fairly well written article of correct length. Demonstrated good understanding of government spending and priorities.	Clear article of correct length. Demonstrated understanding of government spending and priorities.	Article not always clear, but has some structure. Demonstrated a fair amount of understanding of government spending and priorities.	Article is far too long or too short. Demonstrated some understanding of government spending and priorities.	Poorly written article. Demonstrated little understanding of government spending and priorities.	Poorly written and incomplete. Demonstrated no understanding of government spending and priorities.
Accurately identified factors that discourage economic growth.	Good identification of factors that discourage economic growth.	Identified factors that discourage economic growth.	Fair identification of factors that discourage economic growth.	Some identification of factors that discourage economic growth.	Poor identification of factors that discourage economic growth.	No identification of factors that discourage economic growth.
Clearly stated contributions citizens can make towards economic growth and development.	Included good contributions citizens can make towards economic growth and development.	Included contributions citizens can make towards economic growth and development.	Included fair number of contributions citizens can make towards economic growth and development.	Included some contributions citizens can make towards economic growth and development.	Included the isolated contribution citizens can make towards economic growth and development.	Did not include any contributions citizens can make towards economic growth and development.

TASK 3	LO3: AS1,3 & 6	TIME: 70min	TOTAL MARKS 60
Activity 3.2 LO3: AS1 Managerial, Consumer and Financial Knowledge and Skills			
Paired Activity	Time: 15min	Marks: 18	
Form of Assessment: Written Presentation Assessment Tool: Memorandum This activity will assess your ability to identify various aspects of the Income Statement.			
Income Statement			
Study the income statement of Thabo's Knitting Company for the year ended 28 February 2009 on page 11 and answer the following questions.			
3.2.1 The income statement is divided into two sections: income and expenses.			
a. Which items make up the income section? (2)			
b. Which items reduce the income? (2)			
3.2.2 If Thabo's Knitting Company (TKC) has an item called 'rent income' in the income statement, does this mean the TKC pays rent to someone or receives rent from someone? (1)			
3.2.3 Which items make up the expenses section? Why do you think that each of these expense items are necessary expenses for a business? (5)			
3.2.4 Use the information on the income statement to help you describe how the following terms differ from one another: gross profit, gross income and net profit for the year. (6)			
3.2.5 In your own words explain why interest expense is not part of operating expenses. (2)			

Thabo's Knitting Company Income Statement for the year ended 28 February 2009			
Sales		30 000	00
Cost of Sales		(10 000)	00
Gross Profit		20 000	00
Other operating income		3 400	00
Rent income		3 400	00
Gross Operating Income		23 400	00
Operating Expenses		(8 400)	00
Wages and Salaries		6 000	00
Telephone		300	00
Stationery		400	00
Postage		100	00
Advertisements		1 600	00
Operating profit for the year		15 000	00
Interest income		3 000	00
Net profit after interest		18 000	00
Interest expenses		(2 000)	00
Net Profit for the year		16 000	00

TASK 3	LO3: AS1,3 & 6	TIME: 70min	TOTAL MARKS 60
Activity 3.3 LO3: AS1 & 3 Managerial, Consumer and Financial Knowledge and Skills			
Individual Activity		Time: 30min	Marks: 24
Form of Assessment: Written Presentation		Assessment Tool: Memorandum	
This activity will assess your ability to prepare a Balance Sheet and Notes to the Balance Sheet.			
Balance Sheet			
Allan's Food Market is a retail business.			
Instructions			
1. This activity must be completed individually.			
2. Study the Trial Balance on page 13 and prepare the Balance Sheet for Allan's Food Market as at 31 March 2009.			
3. Include the notes to the Balance Sheet as at 31 March 2009.			
4. According to the Income Statement the Net Profit as at 31 March 2009 is R80 300.00			
5. Tear out <u>Annexure G</u> , which is the Balance Sheet template in your book.			

TRIAL BALANCE OF ALLAN'S FOOD MARKET ON 31 MARCH 2009				
	Fol	Debit	Credit	
Balance Sheet Section				
Capital	B1		250 000.00	
Drawings	B2	3 000.00		
Long term Loan: ABC Bank	B3		50 000.00	
Land and buildings	B4	114 300.00		
Equipment	B5	15 000.00		
Trading Stock	B6	110 000.00		
Bank	B7	130 000.00		
Petty Cash	B8	500.00		
Debtors	B9	11 500.00		
Creditors	B10		4 000.00	
Nominal Accounts Section				
Sales	N1		130 000.00	
Cost of Sales	N2	39 000.00		
Rent Income	N3		1 400.00	
Interest Income	N4		3 500.00	
Salaries	N5	11 500.00		
Advertising	N6	1 500.00		
Interest Expense	N7	2 300.00		
Packing material	N8	300.00		
		438 900.00	438 900.00	

TASK 3	LO3: AS1,3 & 6	TIME: 70min	TOTAL MARKS 60
Activity 3.4 LO3: AS6 Managerial, Consumer and Financial Knowledge and Skills			
Individual Activity		Time: 10min	Marks: 6
Form of Assessment: Written Presentation Assessment Tool: Memorandum			
This activity will assess your understanding of different methods of payment in the economy.			
Methods of payments			
Explain the following terms in your own words:			
3.4.1 Debit cards and smart cards		(2)	
3.4.2 Cheques		(2)	
3.4.3 Postal Orders		(2)	

Activity 4.1 LO4: AS1,3 & 5 Entrepreneurial Knowledge, Skills and Attitude.			
Group and Individual Activity	Time: 65min	Marks: 30	
Class discussion and preparation time: 60min			
Form of Assessment: Case Study	Assessment Tool: Rubric		
This activity will assess your ability to identify financial institutions and organizations promoting entrepreneurship; differentiate between forms of ownerships and to engage in business activities that involve marketing and planning.			
Case Study: Kick-starting small businesses and a business called 'Events and Catering CC'			
Abdul Steleki is from Buffalo City in East London. He started a small events business in his garage 5 years ago. He was struggling financially to make ends meet and almost gave up. Fortunately he came across an article in the Sunday Times on <i>Kick-starting small businesses</i> . Read the article on page 17.			
He immediately called the Department of Trade and Industry (DTI) Call Centre and found out more information about the 'one-stop shop' in the Eastern Cape and went to see them. He has not looked back since then.			
His business has grown from a small one man operation into a Close Corporation with 8 active members. The business is trading as Events and Catering CC .			
Events and Catering CC has recently secured a major tender from the government. The newly elected government has promised to create more than 3 million jobs over the next five years. The DTI has been given the mandate by government to drive the process forward. The Marketing Division of the DTI awarded their tender to Events and Catering CC to coordinate all their seminars, conferences and workshops in this regard.			
The first seminar will be held over two days at the Durban Convention Centre on 13 and 14 July 2009.			

Instructions

You are the events coordinating manager for **Events and Catering CC**. You and your team (staff) must prepare a business plan for the seminar. A seminar of this nature requires months of planning and preparations. Please note that for this task you are not required to prepare the entire business plan. **Your group must only focus on:**

1. the marketing plan;
2. the poster and
3. the programme for the two days and a short report.

The Theme for the Seminar is **Towards Sustainable Economic Growth and Development**.

1. Work in your groups and brainstorm ways of marketing the seminar.
2. Use a mind map to record your ideas.
3. Identify the target market
4. Focus on the four P's of marketing: promotion, product, price and place
5. Design the poster on an A4 sheet (each group member must submit a copy)
6. Prepare the Programme for the Seminar on an A4 Sheet.
7. Each member must write her/his own report (approximately 250 words) to say why she/he thinks the seminar will be a success.
8. Use the rubric on page 18 to guide you in the completion of this task.

PLEASE NOTE:

Each group member must submit the following:

1. Copy of the mind map (Group work)
2. Copy of the poster (Group work)
3. Copy of the Programme for the Seminar (Group work)
4. Original hand written report (Individual work)

Kick-starting small businesses

Sipho Mseleku, Chief Executive Officer of both the Chamber of Commerce and Industry of South Africa and the National African Federated Chamber of Commerce and Industry, had the following to say about giving help to entrepreneurs:

'Many entrepreneurs have excellent ideas, but lack the skills and information to be successful. They lack exposure and do not know how to access all the services available to them. Combining all the services into a one-stop shop would make it much easier to educate entrepreneurs and kick-start small businesses.'

In a recent interview with a Sunday Times Business reporter, Mseleku was critical of the way that government has structured its small business development initiatives. He referred to the Umsobomvu Youth Fund, which provides finance for young entrepreneurs; Khula Enterprise Finance, which provides banks with guarantees for loans; and Ntsika Enterprises, which offers information and mentoring services. While these organizations have all had some measure of success, disbursing many millions of rands of funding and creating more than a million jobs in the process, he says that an individual entrepreneur has to work with each organization separately, as well as the Department of Trade and Industry (DTI). This makes starting up a business difficult and complex, leaving entrepreneurs confused.

Mseleku suggests that these institutions could have a bigger impact if all their offerings were made available at one-stop, 'business opportunity centres'. He also mentioned that it is crucial for these centres to be located nationwide so that development is not limited to major centres. As it is, entrepreneurs are being forced into the big cities, leaving areas where small and medium enterprises (SMEs) could be making a big impact and not depriving them of investment and development.

Adapted from: "It's time to get our SME act together", by Nicholas Neveling.
(Sunday Times – Business Times)

ANNEXURE B

SUSTAINABLE GROWTH AND DEVELOPMENT

Summing up

The government spends the tax money it collects from people and businesses according to a financial plan, called the **national budget**. The Minister of Finance plans the budget according to goals set by the state and tables his plan in Parliament in March every year. Since 1994 the main focus of government has been on promoting sustainable economic growth and development in the country to redress the inequalities in society.

As these efforts began to produce positive results, it becomes increasingly important that good **trading relationships** are developed with international markets. South Africa is also in a favourable position to partner with neighbouring countries to develop strong, vibrant economies and societies.

The **Reconstruction and Development Programme (RDP)** developed by the first government of national unity to address the inequalities created in South Africa's past has produced many inspiring success stories, but also receives a great deal of criticism.

A healthy growing economy gives people opportunities to build their personal wealth by **saving and investing** part of their incomes for future prosperity. At the same time, the accumulation of savings and investment in **financial institutions** – banks, insurance companies and property trusts – means that **large pools of capital** are available for investment in large projects.

Commercial and industrial properties, mining ventures, businesses of all sizes, are funded from these sources. Many **job opportunities** result from these developments, thus spreading the wealth-creating potential throughout many families and their communities. In this way, personal wealth-creating measures – savings accounts, investments in property, annuities and equities – all contribute to general **economic prosperity** and growth.

While many businesses turn to technology to improve on **productivity**, this can be a poor choice of strategy in a country like South Africa with its exceptionally high levels of unemployed citizens. Sophisticated technology often results in loss of jobs that are desperately needed. A better option is to find ways to improve **labour efficiency** through education, skills training and motivation; and also to look at ways to use existing equipment and machinery more effectively. **Globalisation** also offers opportunities to find new and bigger markets so that production costs can be reduced through practising **economies of scale**. The competition that an exporter faces in a global market means

that productivity levels must constantly be observed and improved so that the prices and quality of goods remain competitive, to the benefit of consumers.

SADC

The Southern African Development Community (SADC) has been in existence since 1980, when it was formed as a loose alliance of nine majority-ruled States in Southern Africa known as the Southern African Development Coordination Conference (SADCC), with the aim of co-ordinating development projects in order to lessen economic dependence on the then apartheid South Africa.

The founding Member States were: Angola, Botswana, Lesotho, Malawi, Mozambique, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

SADCC was formed in Lusaka, Zambia on April 1, 1980, following the Lusaka Declaration – Southern Africa: Towards Economic Liberation. The transformation of the organisation from a Coordination Conference into a Development Community (SADC) took place on August 17, 1992 in Windhoek, Namibia, when the Declaration was signed at the Summit of Heads of State and Government, thereby giving the organisation a legal charter.

The Member States are: Angola, Botswana, the Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

SADC headquarters are in Gaborone, Botswana.

The SADC Vision

The SADC vision is that of a common future, a future within a regional community that will ensure economic well-being, improvement in the standards of living and quality of life, freedom and social justice and peace and security for the peoples of Southern Africa. This shared vision is anchored on the common values and principles and the historical and cultural affinities that exist between the peoples of Southern Africa.

Restructuring of SADC Institutions

At an Extra-Ordinary Summit on March 9, 2001, in Windhoek, Namibia, approval was given to a Report on the Restructuring of SADC Institutions. This Report articulates a more explicit Common Agenda which takes into account a number of principles such as development orientation, subsidiarity, market integration and development, facilitation and promotion of trade and investment, and variable geometry.

Based on the above principles, SADC's Common Agenda includes:

- the promotion of sustainable and equitable economic growth and socio-economic development that will ensure poverty alleviation with the ultimate objective of its eradication;
- the promotion of common political values, systems and other shared values which are transmitted through institutions that are democratic, legitimate and effective; and
- The consolidation and maintenance of democracy, peace and security.

In contrast to the country-based coordination of sectoral activities and programmes, SADC has now adopted a more centralised approach through which the 21 Coordinating Units have been grouped into four clusters, namely:

- Trade, Industry, Finance and Investment;
- Food, Agriculture and Natural resources;
- Infrastructure and Services; and
- Social and human Development and Special Programmes.

GOALS OF THE RECONSTRUCTION AND DEVELOPMENT PROGRAMME

MEETING BASIC NEEDS

- Providing free basic services like water and electricity
- Providing housing and land subsidies for people living below a certain income level
- Subsidising farmers from historically disadvantaged backgrounds
- Improving public transport by providing subsidies for bus and rail transport through the taxi recapitalisation programme
- Improving infrastructure like roads, railways, hospitals and schools
- Ensuring a clean, safe environment
- Providing healthcare to people who cannot afford private healthcare
- Upgrading hospitals and equipment and training healthcare workers
- Providing social grants like pensions, child support and disability grants

DEVELOPING HUMAN RESOURCES

- Introducing programmes to improve education and training from preschool to tertiary level
- Starting arts, culture, sports and recreation programmes in poor communities
- Youth development programmes such as the Umsubomvu Youth Fund, learnerships and internships
- Improving skills by giving training using money from the Skills Development Levy

BUILDING THE ECONOMY

- Helping small businesses grow by giving them advice and financial support
- Helping industries grow so that they become internationally competitive and employ more people
- Increasing employment and skills development by contracting the unemployed to work on state-funded projects like the Expanded Public Works Programme
- Improving infrastructure such as power stations, dams, roads, railways, harbours, airports, housing, hospitals and schools

DEMOCRATISING THE STATE AND SOCIETY

- Ensuring democracy through regular elections
- Improving our access to rights and information through the Government Communication and Information Service (GCIS)
- Establishing Multi-Purpose Community Centres (Thusong Service Centres) so that people can get different government services in one place
- Employing thousands of community development workers (ODWs) to help people get access to services and opportunities
- Deepening democracy through izimbizos, ward committees, community police forums and school governing bodies

Since 1994 government has provided:

- More than 2 million houses for poor people
- Free schooling for about 5 million learners each year
- Monthly pensions or other social grants paid to over 12 million people
- Free basic water and electricity to most urban residents
- On average R500 a month worth of healthcare each to families without medical aids
- Free antiretroviral treatment for more than 250 000 people living with Aids

ANNEXURE C

MANAGERIAL, CONSUMER AND FINANCIAL KNOWLEDGE AND SKILLS

Summing up

Read the following summary. Do you understand all the words in bold print? If you are not sure, go back and read about them again.

In this module you have learned about more detailed bookkeeping and accounting practices that involve summarising data from **source documents** in one or another journal. The journal chosen is either the **cash receipts journal**, **cash payments journal**, **debtors ledger**, **creditors ledger**, or **creditors ledger** – depending the type of source document used. The totals from each journal are recorded in another book of accounts called a **general ledger** which, in turn, summarises all the incoming and outgoing transactions of the business. In other words, the general ledger holds the records of all the **assets** and **liabilities** of the business. Bookkeepers check the accuracy of their records in the general ledger by drawing up a **trial balance** before preparing financial statements for the business.

At the end of a regular period, usually the financial year of the business, the accountant of the business takes the trial balance figures prepared by the bookkeeper and draws up an **income statement** and a **balance sheet** for the period concerned. The information contained in these two financial statements are valuable to the owner and managers of the business because they accurately provide information about the financial standing of the business and help the owners and managers to make decisions about the future of the business. Comparisons are made using **ratios** to assess the **profitability**, **solvency** and **liquidity** of a business based on this information.

The module went on to explore the features, advantages and disadvantages of different **means of payment** in the economy. It examined various forms of **credit purchases** and considered the advantages of buying goods and services for cash.

Unit 4 looked at the impact of business on society and the environment. It also looked at the part played by public relations in a business concerned with **social responsibility** and **environmental responsibility**. The actions of businesses in working with communities can improve the lives of people in impoverished areas. You were given the opportunity to research the strategies of some South African organisations in the field of social and environmental responsibility.

And finally, the module closed with a brief overview of the laws in South Africa that provided the framework within which business employs its labour. The focus of this unit was on the **basic conditions of employment**, **employment equity** and **non-discrimination**, and skills training.

ANNEXURE D

ENTREPRENEURIAL KNOWLEDGE AND SKILLS

Summing up

All entrepreneurs think of good ideas for enterprises. But then they have to analyse their ideas to make sure they will work. To do this, they conduct **feasibility studies** in which they consider the **factors of production** like **capital**, **competition**, **materials**, **transport**, **labour** and possible **locations** for the business. Then they do a **SWOT** exercise to analyse the **strengths**, **weaknesses**, **opportunities** and **threats** to their idea (or their business if it is already up and running). After that some market research, perhaps in the form of a **questionnaire**, will help them **understand what the market wants and needs**.

Then a **business plan** is needed. This will help entrepreneurs to consolidate all aspects of the business and is needed by **financial institutions** when loans are negotiated. This plan consists of a description of the product and the business, a **budget**, a **marketing plan** and an **operational plan**. An entrepreneur should consider which **form of ownership** suits the business best – being a **sole proprietor**, working in a **partnership** or perhaps forming a **Closed Corporation**. When getting ready to market products, they should consider ways of **creating a demand** by making consumers aware of the products, by **careful pricing**, by **differentiating** the products from others on the market and by looking for **new markets**. Different **media**, like **newspapers**, **pamphlets**, **notice-boards** and the **radio** can be used to **promote products**.

The **government is also encouraging the formation of small, medium and micro enterprises (SMMEs)**. Several agencies have been set up to provide assistance in the form of business skills training and help with financial matters. SMMES help to **create wealth** in the country because by **creating income** they enable consumers to support themselves and become part of the economic cycle. They also create **jobs** and help to bring down **unemployment**.

ANNEXURE E

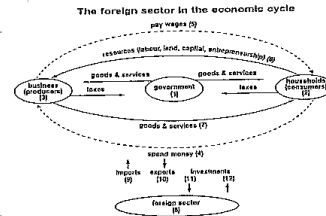
RUBRIC TO ASSESS TASK 2: The National Budget and Government Spending

7	6	5	4	3	2	1
Outstanding achievement	Meritorious achievement	Substantial achievement	Adequate achievement	Moderate achievement	Elementary achievement	Not achieved
80-100%	70-79%	60-69%	50-59%	40-49%	30-39%	0-29%
24-30 marks	21-23 marks	18-20 marks	15-17 marks	12-14 marks	8-11 marks	0-8 marks
Well written and of correct length.	Fairly well written article of correct length.	Clear article of correct length.	Article not always clear, but has some structure.	Article is far too long or too short.	Poorly written article.	Poorly written and incomplete.
Demonstrated excellent understanding of government spending and priorities.	Demonstrated good understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated a fair amount of understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated little understanding of government spending and priorities.	Demonstrated no understanding of government spending and priorities.
Accurately identified factors that discourage economic growth.	Good identification of factors that discourage economic growth.	Identified factors that discourage economic growth.	Fair identification of factors that discourage economic growth.	Some identification of factors that discourage economic growth.	Poor identification of factors that discourage economic growth.	No identification of factors that discourage economic growth.
Clearly stated contributions citizens can make towards economic growth and development.	Included good contributions citizens can make towards economic growth and development.	Included contributions citizens can make towards economic growth and development.	Included fair number of contributions citizens can make towards economic growth and development.	Included some contributions citizens can make towards economic growth and development.	Included the isolated contribution citizens can make towards economic growth and development.	Did not include any contributions citizens can make towards economic growth and development.

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ANNEXURE F

THE ECONOMIC CYCLE



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ANNEXURE E

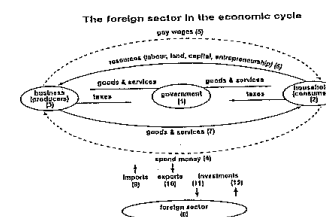
RUBRIC TO ASSESS TASK 2: The National Budget and Government Spending

7	6	5	4	3	2	1
Outstanding achievement	Meritorious achievement	Substantial achievement	Adequate achievement	Moderate achievement	Elementary achievement	Not achieved
80-100%	70-79%	60-69%	50-59%	40-49%	30-39%	0-29%
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Demonstrated excellent understanding of government spending and priorities.	Demonstrated good understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated a fair amount of understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated little understanding of government spending and priorities.	Demonstrated no understanding of government spending and priorities.
Accurately identified factors that discourage economic growth.	Good identification of factors that discourage economic growth.	Identified factors that discourage economic growth.	Fair identification of factors that discourage economic growth.	Some identification of factors that discourage economic growth.	Poor identification of factors that discourage economic growth.	No identification of factors that discourage economic growth.
Clearly stated contributions citizens can make towards economic growth and development.	Included good contributions citizens can make towards economic growth and development.	Included contributions citizens can make towards economic growth and development.	Included fair number of contributions citizens can make towards economic growth and development.	Included some contributions citizens can make towards economic growth and development.	Included the isolated contribution citizens can make towards economic growth and development.	Did not include any contributions citizens can make towards economic growth and development.

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ANNEXURE F

THE ECONOMIC CYCLE



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ANNEXURE G

ALLAN'S FOOD MARKET

Balance Sheet as at 31 March 2009

NON CURRENT ASSETS					
Tangible Assets		1			
CURRENT ASSETS					
Inventories (<i>Trading Stock</i>)					
Trade and other receivables (<i>Debtors</i>)					
Cash and cash equivalents		2			
TOTAL ASSETS					
OWNER'S EQUITY					
NON-CURRENT LIABILITIES (<i>LT Loan</i>)		3			
CURRENT LIABILITIES					
Trade and other payables		4			
TOTAL EQUITY AND LIABILITIES					
Tangible Assets					
1 (<i>Fixed Assets</i>)	Land & Building		Equipment	Total	
Cost price					
Cash and Cash Equivalents					
Bank					
Petty Cash					
Owner's Equity					
Balance at beginning (1 March)					
Net Profit					
Drawings					
Trade and other payables					
Creditors					

ANNEXURE H

RUBRIC TO ASSESS TASK 4: Case Study – Events and Catering CC

7	6	5	4	3	2	1
Outstanding achievement 80-100% Group Work 16-20 marks	Meritorious achievement 70-79% Group Work 14-15 marks	Substantial achievement 60-69% Group Work 12-13 marks	Adequate achievement 50-59% Group Work 10-11 marks	Moderate achievement 40-49% Group Work 8-10 marks	Elementary achievement 30-39% Group Work 6-7 marks	Not achieved 0-29% Group Work 0-5 marks
Excellent mind map. Includes the four Ps of marketing. Shows planning and consultative process. Poster: very creative, attractive and to the point. Well directed to target market.	A Very good mind map. Includes the four Ps of marketing. Shows planning and consultative process. Poster: Attractive to the point and well directed to target market.	Well drafted mind map. Includes the four Ps of marketing. Shows planning and consultative process. Poster: Attractive to the point. No clear focus on target market.	Well drafted mind map. Includes the four Ps of marketing. Shows planning and consultative process. Poster: fairly well designed and to the point, but no clear focus on target market.	Poor mind map. Includes the four Ps of marketing. Shows planning and consultative process. Poster: not well designed. Only some focus given to the target market.	Poor mind map. Does not include all the Ps of marketing. Lacks planning and consultative process. Poster: Poorly designed and is not appropriate to the target market.	Poor mind map. Does not include all the Ps of marketing. No planning and consultative process evident. Poster: Does not meet the requirements.
Programme well designed and includes all the elements of time, topic, name of presenters, lunch and tea breaks.	Programme well designed and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme design can be improved and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme lacks clarity and focus.	Programme designed very poorly and not structured in a logical manner	Programme is not structured and many of the key elements are missing	
Individual Report 8-10 marks Very well structured report with clear motivations.	Individual Report 7 marks Very well structured report with clear motivations.	Individual Report 6 marks A good report which demonstrates a positive attitude.	Individual Report 5 marks A fair report. Requires more input.	Individual Report 4 marks Needs to focus more on structure and content.	Individual Report 3 marks Poorly written report. Very little effort shown.	Individual Report 0-2 marks Poorly written and incomplete. No effort shown.

TOTAL MARKS 30

Activity Marks	
Group Work	
Report	
Total Marks	

Name of Learner: _____

Glossary

annuity – a fixed amount of money paid to somebody each year once it matures, usually for the rest of their life, a type of insurance that pays a fixed amount of money to somebody each year, a private pensions scheme

assets – items of value over which a business entity has control

balance sheet – statement that shows the financial position of the business by listing the assets and liabilities as at a specific date

black market – a system in which goods or currencies are sold and bought illegally, particularly in violation of rationing or state controls

break-even price – the price at which a business covers the cost of production of goods but does not make a profit

budget – a summary of probable income and expenses for a particular period; the total amount of money allocated to a particular project or department for a specified period

business plan – a complete plan of a proposed business

capital – an amount of money (or property) invested to start up a business and make more money

capital growth – an increase in the amount of money (capital) that is available for investment purposes

capitalism – an economic system in which trade and industry are controlled by private businesses which make profits

capitalist – a person who is in favour of capitalism, who uses money to make more money

cash flow – the movement of money into and out of a business

cash payments journal – a book of accounts in which all payments made by the organisation is recorded

cash receipts journal – a book of accounts in which all money received by the organisation is recorded

close corporation – a legal business association of between one and ten members

commercial bank – a bank that makes a profit from providing banking services

communism – an economic system in which property and businesses are owned by the community and not by individuals

competitors – people who sell the same products or services

consumers – people who buy and use goods and services to satisfy needs

corporate tax – tax on profits, paid by businesses to the government

creditor – a business or person from whom you have bought something on credit

creditors journal – a book of accounts in which expenses of the organisation are recorded on pages allocated to the person or organisation to which money is owed

current assets – assets used within the present business year or cycle

debtors journal – a book of accounts in which monies owed to the organisation are recorded on pages allocated to the person or organisation owing the debt

debtors – people who still owe money to the business for goods sold on account

debtors ledger – records the details of a credit sale – when trading stock or services are sold and payment is delayed to a future date

demand – the amount of a good that consumers are willing and able to buy at a specified price

differentiating a product – making it different from similar products of competitors

direct costs – the costs that can be directly attributed to the production of a good, such as raw materials and labour

distribution – moving goods from factories to wholesaler businesses and to retailers

double-entry – system of entry in which each payment appears twice, in different accounts, once as a credit and once as a debit. Each debit item must have a corresponding credit and the totals of all credit and debit entries must agree (be equal)

economic growth – an increase in the economic activity of a country which results in a rise in the standard of living

economic integration – removal of restrictions to the free flow of goods, services and production between partnering countries

economic systems – the way in which business and the economy of a country is organised, for example, capitalism and communism

economies of scale – reducing the cost of each item by producing larger quantities. More goods share the costs of capital investment and overheads, thus reducing the unit cost.

economy – an area in which production consumes¹ and exchange takes place

efficiency – doing something well with no waste of resources, such as time, materials or money

employees – supply labour in return for wages

employers – offer work opportunities

employment opportunities – job prospects; chances of finding paid work

entrepreneur – a person who identifies a need that can be satisfied with a business product

equilibrium price – the price at which a good would cover all costs involved in producing it, without making a profit for the business

exchange rate – the price of a currency expressed in terms of another currency

excise duty – tax paid to the government on things like alcohol and cigarettes

expenditure – money the government spends on health, education, safety, etc

expenses – money spent on buying things needed in a business

exports – goods or services that are produced in one country and sold for use in another country

factors of production – the physical, financial and human resources used in production

factors of establishment – the environmental factors that affect a new business

feasible – possible and likely to be achieved

feasibility study – an analysis of whether or not a business will make a profit

financial institution – a bank or organisation that lends and invests money

financial yardstick – financial standard used for comparison, usually on a monthly, quarterly or annual basis, or between similar businesses

fixed assets – things like buildings, vehicles and equipment that belong to a business and that last a long time

fixed capital – the money needed to start up a business (for example, to buy equipment) and keep it running

fixed costs – costs involved in production of income, which do not change regardless of how much or how little business is done, such as rent and insurances. Also called 'overheads'

fixed deposit – bank account where you invest money for a fixed period, for example, six months and early withdrawal will cost the investor money in penalty payments

flow of money – the way that money moves in an economic system between businesses, consumers, the government and other companies

foreign exchange – the money from other countries, which is used to pay for goods and services traded between different countries

foreign sector – other countries

franchise – the right to run a business using the name and ideas of an established business

franchisee – the person who buys into a concept and its systems and support mechanisms being sold by the franchisor

franchisor – the person or company selling a business concept and its support mechanisms

free market – country or group of countries that allow businesses to operate without state control or interference, and to trade without customs duties on goods

free trade – system of international trade in which there are no restrictions or taxes on imports and exports

general ledger – a book of accounts in which transaction summaries are recorded

global economy – the world economy

globalisation – the trend towards free trade between all countries in the world

goals – objectives, things to achieve

goods – products

gross domestic profit (GDP) – the total value of all the goods and services a country produces in one year

gross national product (GNP) – the total value of all the goods and services a country produces in one year, including the total income from foreign countries

gross profit – the difference between the income and expenses of a business, before tax

gross profit percentage – the gross profit calculated as a percentage of the expenses (investment)

imports – goods or services brought into one country that have been bought from another country

impovertished – made poor, usually by circumstances beyond the individual's control

income – also referred to as 'revenue', this is money earned by a business from sales of goods or from services rendered

income statement – a summary of business transactions over a period of time; shows total sales, gross profit, total expenses and net profit

income tax – tax that you pay on your income – the money you earn

indirect costs – expenses that cannot be directly attributed to the production of a product

pension fund – a fund where you put away money every month and get a pension (regular monthly income) when you retire
private – how goods are priced
private company – a business registered in terms of the Companies Act, 1973, consisting of up to fifty persons, each of whom owns a share of the business
privately owned – material goods or property that are owned by an individual
private sector – businesses owned by private people
product awareness – telling consumers about products
productivity – describes how quickly inputs can be turned into outputs for sale
profit – the income or reward received by an entrepreneur as a result of running a business
profitability – business actions that result in a profit
prosperity – the state of being successful, especially financially
protectionism – a country's trade policy that discourages imports by imposing duties or quotas on these imports, to protect local industries
provident fund – a fund where you put away money every month and get a lump sum when you retire
public company – a large business listed on a stock exchange. Unlimited numbers of individuals can become shareholders by buying stock in the business
public sector – the government or state
quotas – a restriction on imports that limits the quantity of imported goods that can be brought into a country during a specified period of time
real returns – returns that have been adjusted to allow for inflation during the period of investment
retailers – smaller shops that sell goods to the consumer
return on investment – the amount of interest that you can expect to receive for leaving money in bank
revenue – the money collected by the government from taxes
South African Revenue Services (SARS) – the government's tax collection department
services – products that you cannot see or touch, like banking and education
shares – a part of the equal parts into which the capital of a business is divided, entitling the investor a share of the profits as a

dividend on the shares, as well as capital growth if the value of the business increases

short-term goals – goals that can be achieved quickly

skills training – training that provides people with skills

SNMME – Small, Medium and Micro Enterprises social welfare programmes – strategies undertaken by government to look after or improve the wellbeing of citizens unable to care adequately for themselves

sole proprietor – a person who is the single owner of a business

solvency – the ability to pay long-term debt

source document – the primary record of a business transaction

start-up costs – the total costs involved in starting a business, from conception to the point where the business begins to make a profit

state ownership – material goods or property that are owned by the state (government)

stock – goods that a business has manufactured or purchased

stocked – an informal saving scheme

strike – when workers stop work in order to protest about something

supply – the provision of goods and services; the quantity of goods or services available to the market

survey – market research, asking people their opinions, finding out things

sustainable – growth and development that can be maintained over time as it does not use up natural resources that cannot be replaced

SWOT analysis – a study of strengths, weaknesses, opportunities and threats

target market – the people (or other businesses) who you hope will buy your product or service

tariff – a tax that is paid on goods coming into or going out of a country

tax rates – the rate or level of tax to be paid on income by individuals and businesses; the amount of tax paid depends on the amount earned

trade agreement – an agreement (usually between countries) that defines the terms of how business will be done

trade union – an association of employees formed to improve their incomes and working conditions by collective bargaining with the employer or employer organisations

trading partners – people with whom you trade, with whom you have a trading agreement

transaction – the action of buying or selling, conducting business

trial balance – a listing of the balances on all the accounts of an organisation with debit balances in one column and credit balances in the other. If the processes of double-entry book-keeping have been accurate, the totals of each column should be the same. If they are not the same, checks must be carried out to find the error

UIF – unemployment insurance fund (UIF) – a fund to which employers and employees contribute and from which employees can claim if they lose their jobs

unit trusts – an investment fund that pools investments from different people and then buys shares in companies listed on the stock exchange

value – the worth of something; an amount considered to be a fair exchange for a particular good or service

value added – the difference between the total input (expenses) and the total output (revenue or income) of a business

value added tax (VAT) – the difference between the total input (expenses) and the total output (revenue or income) of a business

variable costs – the expenses of a business that are directly related to the quantity of goods or services produced. Also called 'direct costs'

viability – profitability

APPENDIX K

CTA EDUCATOR'S GUIDE



education

Department:
Education
REPUBLIC OF SOUTH AFRICA

COMMON TASK ASSESSMENT (CTA)

GRADE 9 – 2009

ECONOMIC AND MANAGEMENT SCIENCES

TEACHER'S BOOK

SECTION A

Theme: General Elections - 2009

Suggested Time: 4 hours

160 marks

No of pages: 40

Page 1 of 40

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INTRODUCTION

The Theme of this CTA is 'The 2009 General Elections'. Throughout the CTA you must constantly refer to the elections and the Government's priorities in terms of the Reconstruction and Development Programme (RDP). The key tasks for the government in terms of the RDP are:

1. Meeting basic needs;
2. Developing our human resources;
3. Building the economy and
4. Democratising the state and society.

These priorities are embedded in Economic and Management Sciences (EMS). All four of the Learning Outcomes focus on the key priorities mentioned above. As an EMS teacher, you are uniquely poised to create awareness and to inspire your learners to become actively involved in the sustained economic growth and development of our country.

As you work through the CTA, you will notice we have not dwelt on the election campaigns of any of the individual political parties, but rather, on creating awareness of the government's major priorities.

There are four tasks in this CTA. We have tried to focus each task on specific learning outcomes but as you are aware these learning outcomes are all inter-related. Also please note that the CTA format for this year has been changed.

Section A of the CTA, covering all the learning outcomes will be completed in the second term. Section B will be written at the end of the year. We recognize that it is impossible to complete the entire curriculum before we start the Common Tasks Assessments at the end of the second term. Hence, we have incorporated the activities to include the work previously covered in grades 7 and 8. A summary for each learning outcome has been included in the CTA together with a Teacher's Guide and a comprehensive glossary as support material.

Please note the time allocated for the activities is exclusive only to the learners' time to complete the activities under your supervision. It does not include preparation time necessary

before the learners begin their activities. We strongly suggest that you allow sufficient time for such preparation, going over particular sections of work or do revision where necessary to ensure learners are adequately prepared. You will notice we are not being prescriptive. Since you know your learners better than anyone else, only you can determine on the amount of pre CTA preparation you may need to provide for your learners. Also note, the CTA requires the learners to work in groups, in pairs and individually.

Before you start with the CTA, it is very important that you go over the questions and make sure the learners know what is expected of them. Discuss time management and emphasize the need to hand in good quality work as this forms part of the Critical and Developmental Outcomes that our learners also have to achieve.

For the benefit of learners a glossary of terms is included at the end of the Learner's Book. All the best and enjoy this learning experience.

For the benefit of learners a glossary of terms is included at the end of the Learner's Book.

All the best and enjoy this learning experience.

All the best and enjoy this learning experience.

All the best and enjoy this learning experience.

All the best and enjoy this learning experience.

All the best and enjoy this learning experience.

TASK 1

LO 1: The Economic Cycle

Activity 1.1

AS 1 and 2

Instructions

Read and discuss **Annexure A** with your learners. Please note that this must be done before the learners start with the activity. Do revision if necessary. Allow learners to use their text books as well as any other relevant resources.

Memorandum – Activity 1.1

[Total marks for this activity = 16]

1.1.1 *In your own words explain the role of government, businesses, the foreign sector and households in the economic cycle.*

Role of Government

- Collects taxes from households and businesses
- Uses money to provide goods and services
- Employs households and pays them salaries and wages
- Employs business – service providers, contractors etc **(Any 3 X 1) = 3 marks**

Role of Businesses

- They are producers
- Provide goods and services to households
- Receive money from households for the goods and services
- Pays wages and salaries to households for labour
- Pays taxes to government on profits earned
- Receive goods and services from government **(Any 3 X 1) = 3 marks**

Role of the foreign sector

- Businesses from the foreign sector interact with the South African economic cycle
- South Africa pays money for imported goods and services
- South Africa receives money for goods and services exported to foreign countries
- South Africa invests money overseas
- The foreign sector invests money in South Africa **(Any 3 X 1) = 3 marks**

Role of the households

- Households are consumers of goods and services
- Spend money on goods and services
- Pay taxes to the government on the money they earn – PAYE
- Receives goods and services from government e.g. health, education, roads
- Earn salaries and wages in return for labour. (Any 3 X 1) = 3 marks

1.1.2 What are the resources that households provide?

- Labour
- Land
- Capital
- Entrepreneurship

(1 X 4) = 4 marks

Activity 1.2

[Total marks for this activity = 12]

1.2.1 Briefly explain foreign trade.

- Foreign trade is when countries trade with other countries. They either import or export goods from each other.

Any suitable answer (1 x 1) = 1 mark

1.2.2 What are the main goals of SADC?

- Ensure economic well being in the SADC region
- Improve standards of living and quality of life
- Freedom and social Justice
- Peace and security

Any two (2 x 1) = 2 marks

1.2.3 Study bar graph showing South Africa's most important trading partners and answer the following questions:

1.2.3.1 Which countries are the biggest export markets for South Africa?

- Angola and Mozambique

(1 x 2) = 2 marks

1.2.3.2 Why do you think these countries are South Africa's biggest export markets?

- They are nearby and they have relied on South Africa for all imported and exported goods.

2 marks

1.3.2.3 Explain how South Africa benefits from its foreign trade?

- Free-trade agreements in the SADC regions
- Gain foreign income
- Create job opportunities
- Export and market South African products and services
- Foreign countries invest in South Africa

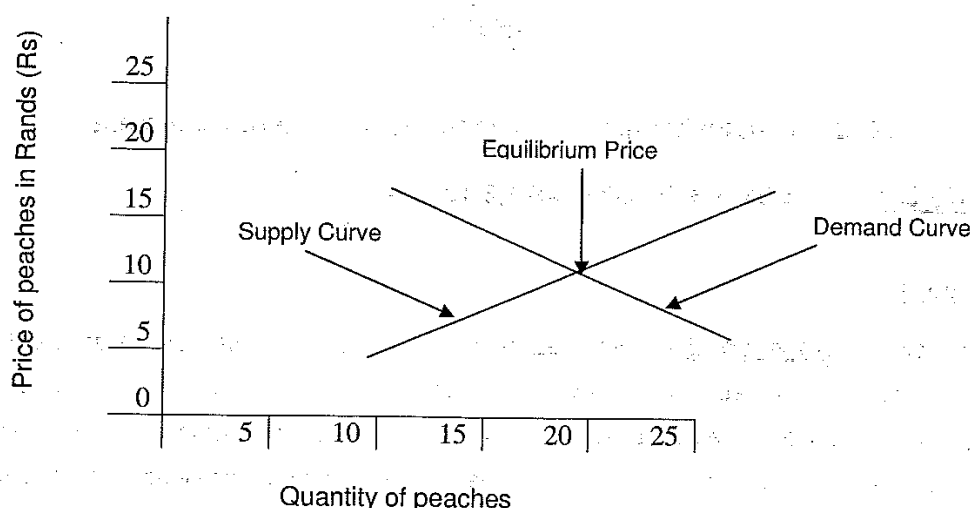
(any suitable response from learners. Open ended. 1 mark for each benefit identified or listed)

(5 x1) = 5 marks

Activity 1.3

[Total marks for this activity = 12]

1.3.1 Use the information given in the table below to draw (plot) the demand and supply curves. Draw both curves (graphs) on the same graph to show the effects of supply and demand on prices. Indicate the equilibrium price (E) on your graph.



Allocate marks for the graph as follows:

- Supply curve (1)
 - Demand curve (1)
 - Equilibrium price (2)
 - Vertical Axis = Price (1)
 - Horizontal Axis = Quantity (1)
 - Drawing and labeling (1)
- Total of 7 marks for this question**

1.3.2 Interpret the graph in your own words.

- Supply and demand is equal at R12-00. This means that the consumers are willing to pay R12 per box and producers will supply at R12-00 per box = **Equilibrium price**.
- **The law of demand** states that demand increases when prices fall and when prices increase demand falls.
- **The law of supply** states that as the price increases, the quantity supplied increases and that as the price falls the quantity supplied decreases.

The learners response should include the above. Award marks as follows:

- Law of supply** 2 marks
 - Law of demand** 2 marks
 - Equilibrium prices** 1 mark
- Total of 5 marks for this question**

TASK 2

LO 2: Sustainable growth, reconstruction and development

Activity 2.1 LO1: AS 5; LO2: AS 1,2,3 and 4

Instructions

Read and discuss **Annexure B** with your learners. Please note that this must be done before the learners start with the activity. Do revision if necessary. Allow learners to use their text books as well as any other relevant resources. This activity requires learners to write an article. If your learners are not sure how to write an article, give them some guidelines. This activity

requires group work and individual output. Working in groups, learners are given **60 minutes** to **plan** for the article. Once they have discussed the content and structure of the article in their groups they must return to their desks and complete their articles in the **60 minutes** allocated for this activity. (Total Planning and Activity time: 2 hours. See Table of Contents.)

This activity requires:

- Learners to work in groups to brainstorm and plan on how to write the article and to identify the relevant content. Please note the articles must be written individually and not as a group.
- Learners to write an article for their community newspaper on how the government plans to spend the tax payer's money
- The article must not to be more than 350 words in length.

The learner's article must include the following:

1. ***An analysis of the changes in government spending between the budgets of 2007/2008 and 2008/2009 with regards to Education, Health, Welfare and Housing.***
2. ***With reference to Annexure B, Learner must list four areas where the government has achieved its goals.***
3. ***An opinion on whether the budget caters for the four key programme areas of the RDP?***
4. ***An explanation of the importance of Education for economic growth and development.***
5. ***An evaluation of whether the budget promotes economic growth in terms of job creation and promoting investments?***
6. ***A list of factors that can discourage economic growth in South Africa and how the government can overcome this.***
7. ***What ordinary people can do in their daily lives to promote economic growth and prosperity in South Africa?***

ASSESSING THIS ACTIVITY

- Refer to **Annexure B** regarding content.
- use the **rubric** below to assess the learner's work.

7	6	5	4	3	2	1
Outstanding achievement	Meritorious achievement	Substantial achievement	Adequate achievement	Moderate achievement	Elementary achievement	Not achieved
80-100%	70-79%	60-69%	50-59%	40-49%	30-39%	0-29%
24-30 marks	21-23 marks	18-20 marks	15-17 marks	12-14 marks	8-11 marks	0-8 marks
Well written and of correct length.	Fairly well written article of correct length.	Clear article of correct length.	Article not always clear, but has some structure.	Article is far too long or too short.	Poorly written article.	Poorly written and incomplete.
Demonstrated excellent understanding of government spending and priorities.	Demonstrated good understanding of government spending and priorities.	Demonstrated understanding of government spending and priorities.	Demonstrated a fair amount of understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated little understanding of government spending and priorities.	Demonstrated no understanding of government spending and priorities.
Accurately identified factors that discourage economic growth.	Good identification of factors that discourage economic growth.	Identified factors that discourage economic growth.	Fair identification of factors that discourage economic growth.	Some identification of factors that discourage economic growth.	Poor identification of factors that discourage economic growth.	No identification of factors that discourage economic growth.
Clearly stated contributions citizens can make towards economic growth and development.	Included good contributions citizens can make towards economic growth and development.	Included contributions citizens can make towards economic growth and development.	Included fair number of contributions citizens can make towards economic growth and development.	Included some contributions citizens can make towards economic growth and development.	Included the isolated Contribution citizens can make towards economic growth and development.	Did not include any contributions citizens can make towards economic growth and development.

The National Budget and Government Spending

TASK 3

LO 3: Managerial, Consumer and Financial Knowledge and Skills

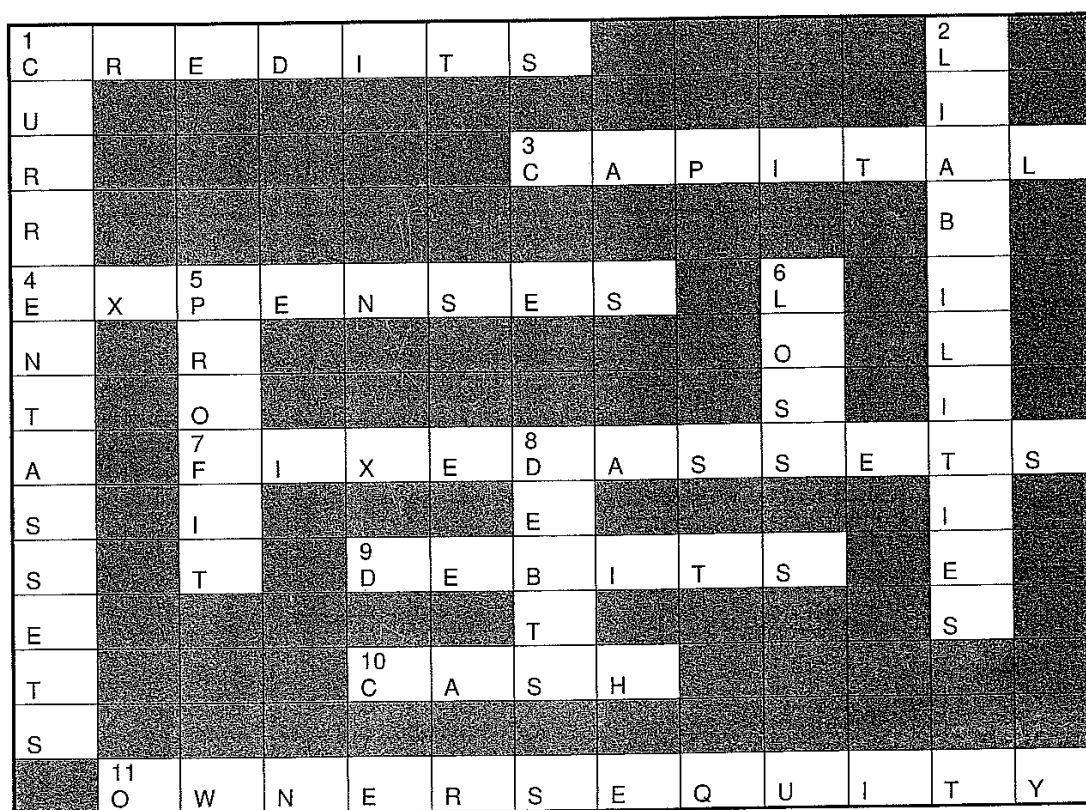
Activity 3.1 **LO3: AS 1, 3**

Read and discuss **Annexure C** with your learners. Please note that this must be done before the learners start with the activity. Do revision if necessary. Allow learners to use their text books as well as any other relevant resources.

For this activity learners are required to work in pairs to complete the crossword puzzle. Ask the learners to tear out the crossword puzzle (page 9) in their work books. Learners have **15 minutes** for this activity. Once they have completed it you must collect it and mark it.

Memorandum for activity 3.1

[Total marks for this activity = 12]



Answers Across:

1. Credits
3. Capital
4. Expenses
7. Fixed Assets
9. Debits
10. Cash
11. Owners Equity

Answers Down:

1. Current Assets
2. Liabilities
5. Profits
6. Loss
8. Debts

Activity 3.2

LO3: AS 1, 3

[Total marks for this activity = 18]

In this activity learners have to study the Income statement of Thabo's Knitting Company for the year ended 28 February 2009 on page 11 in the learner's book and answer questions set about the income statement. Learners have 15 minutes for this activity.

A copy of the Income Statement for Thabo's Knitting Company is included on the next page for easy reference.

Thabo's Knitting Company
Income Statement for the year ended 28 February 2009

Sales		30 000	00
Cost of Sales		(10 000	00)
Gross Profit		20 000	00
Other operating income		3 400	00
Rent income		3 400	00
Gross Operating Income		23 400	00
Operating Expenses		(8 400	00)
Wages and Salaries		6 000	00
Telephone		300	00
Stationery		400	00
Postage		100	00
Advertisements		1 600	00
Operating profit for the year		15 000	00
Interest Income		3 000	00
Net profit after interest		18 000	00
Interest expenses		(2 000	00)
Net Profit for the year		16 000	00

Memorandum for activity 3.2

3.2.1 The income statement is divided into two sections: income and expenses.

a. Which items make up the income section?

- Sales and Rent income make up the income section.

2 marks

b. Which items reduce the income?

- Cost of sales and the operating expenses reduces the income

2 marks

3.2.2 *If Thabo's Knitting Company (TKC) has an item called 'rent income' in the income statement, does this mean the TKC pays rent to someone or receives rent from someone?*

- TKC receives rent. 1 mark

3.2.3 *Which items make up the expenses section? Why do you think that each of these expense items are necessary expenses for a business?*

- Wages and salaries, telephone, stationery, postage and advertisements make up the expenses section. 3 marks
- The business needs to pay labour and also cover the overhead expenses related to producing the goods it sells. 2 marks

3.2.4 *Use the information on the income statement to help you describe how the following terms differ from one another: gross profit, gross income and net profit for the year.*

- Gross profit: is the total profit earned from selling goods, after deducting the cost of the materials used to make the goods it sells 2 marks
- Gross income: is the total income (including rent income) after deducting the direct costs of production 2 marks
- Net profit: is the remaining income after all the expenses and fixed costs have been deducted. 2 marks

3.2.5 *In your own words explain why interest expense is not part of operating expenses.*

- Interest expense is not part of operating expenses because interest is charged by banks on a loan issued to the business. It is a cost on liability. 2 marks

Activity 3.3

LO3: AS 1 & 3

[Total marks for this activity = 24]

This activity will assess the learner's ability to prepare a Balance Sheet and Notes to the Balance Sheet. The learners will have to fill in the appropriate information on the template provided. Learners have **30 minutes** for this activity.

The Trial Balance of Allan's Food Market is on the next page of this book.

Instructions

- 1. This activity must be completed individually.***
- 2. Learners must study the Trial Balance on page 13 of their work books and prepare the Balance Sheet for Allan's Food Market as at 31 March 2009.***
- 3. They must include the notes to the Balance Sheet as at 31 March 2009.***
- 4. Tell the learners that the Net Profit as at 31 March 2009 is R80 300. 00, they will need this information to complete the Balance Sheet.***
- 5. Ask the learners to tear out the Balance Sheet template from the back of their work Books – ANNEXURE G***

TRIAL BALANCE OF ALLAN'S FOOD MARKET ON 31 MARCH 2009

	Fol	Debit		Credit	
Balance Sheet Section					
Capital	B1			250 000	00
Drawings	B2	3 000	00		
Long term Loan: ABC Bank	B3			50 000	00
Land and buildings	B4	114 300	00		
Equipment	B5	15 000	00		
Trading Stock	B6	110 000	00		
Bank	B7	130 000	00		
Petty Cash	B8	500	00		
Debtors	B9	11 500	00		
Creditors	B10			4 000	00
Nominal Accounts Section					
Sales	N1			130 000	00
Cost of Sales	N2	39 000	00		
Rent Income	N3			1 400	00
Interest Income	N4			3 500	00
Salaries	N5	11 500	00		
Advertising	N6	1 500	00		
Interest Expense	N7	2 300	00		
Packing material	N8	300	00		
		438 900	00	438 900	00

Memorandum for activity 3.3

[Total marks for this activity = 24]

ALLAN'S FOOD MARKET
Balance Sheet as at 31 March 2009

NON CURRENT ASSETS					129 300	00	✓
	Tangible Assets	1			129 300	00	✓
CURRENT ASSETS					252 000	00	✓
	Inventories (<i>Trading Stock</i>)				110 000	00	✓
	Trade and other receivables (<i>Debtors</i>)				11 500	00	✓
	Cash and cash equivalents	2			130 500	00	✓
TOTAL ASSETS				→	381 300	00	✓
OWNER'S EQUITY		3			327 300	00	✓
	NON-CURRENT LIABILITIES (<i>L/T Loan</i>)				50 000	00	✓
CURRENT LIABILITIES					4 000	00	✓
	Trade and other payables	4			4 000	00	✓
TOTAL EQUITY AND LIABILITIES				→	381 300	00	✓
1	Tangible Assets (<i>Fixed Assets</i>)						
		Land and Buildings		Equipment		Total	
	Cost price	114 300	✓	15 000	✓	129 300	00
2 Cash and Cash Equivalents							
	Bank				130 000	00	✓
	Petty Cash				500	00	✓
					130 500	00	✓
3 Owner's Equity							
	Balance at beginning (1 March)				250 000	00	✓
	Net Profit				80 300	00	✓
	Drawings				(3 000)	00	✓
					327 300	00	✓
4 Trade and other payables							
	Creditors				4 000	00	✓
					4 000	00	✓

Activity 3.4 LO3: AS 6

[Total marks for this activity = 6]

Methods of Payments

In this activity the learners are expected to explain the following terms in their own words.

Learners have **10 minutes** for this activity.

Memorandum for activity 3.4

Explain the following terms in your own words:

3.4.1 Debit cards and smart cards

A debit card or smart card enables you to use the ATM to withdraw, deposit or to get account balances. It also enables you to pay for your purchases without having to carry cash with you.

2 marks

3.4.2 Cheques

People who have cheque (current) account facilities at a bank can pay for goods by cheque. This is also regarded as a cash payment, because the buyer's bank will pay the money into the seller's bank account according to the information written on the cheque.

2 marks

3.4.3 Postal Orders

Sometimes people want to send money to someone in another city. The Post Office sells postal orders which the buyer then mails to the receiver of the money. The receiver can cash the postal orders at his or her local post office on presenting their identity book, and so get cash immediately. A postal order does not expire, so the payee can cash it at any time.

2 marks

TASK 4

LO 4: Entrepreneurial Knowledge, Skills and Attitude.

Activity 4.1

LO4: AS 1, 3 & 5

Instructions

Read and discuss **Annexure D** with your learners. Please note that this must be done before the learners start with the activity. Do revision if necessary. Allow learners to use their text books as well as any other relevant resources. This is a fun activity as it requires the learners to be creative. You may read the case study and article to the learners or ask learners to read it aloud. Assist them to understand the case study and then divide them into groups.

Group Work: In this group activity, learners need to work in their groups to brainstorm ideas on the design of the poster and the programme schedule for the seminar. This must be recorded on a mind map. Each group will therefore have to complete one mind map, one poster and one programme. Each group member will submit a copy of the mind map, poster and programme as evidence. Learners have **60 minutes** for this activity.

Individual Work: The group work is followed with each learner on her/his own writing a short report on the seminar. The report must not be more than 250 words. Learners have **65 minutes** for this activity.

Use the rubric on page 20 to assess this activity.

Case Study: Kick-starting small businesses and a business called '*Events and Catering CC*'

Abdul Steleki is from Buffalo City in East London. He started a small events business in his garage 5 years ago. He was struggling financially to make ends meet and almost gave up. Fortunately he came across an article in the Sunday Times on *Kick-starting small businesses*. Read the article on page 16.

He immediately called the DTI Call Centre and found out more information about the 'one-stop shop' in the Eastern Cape and went to see them. He has not looked back since then. His business has grown from a small one man operation into a Close Corporation with 8 active members. The business is trading as ***Events and Catering CC***.

Events and Catering CC has recently secured a major tender from the government. The newly elected government has promised to create more than 3 million jobs over the next five years. The DTI has been given the mandate by government to drive the process forward. The Marketing Division of the DTI awarded their tender to ***Events and Catering CC*** to coordinate all their seminars, conferences and workshops in this regard.

The first seminar will be held over two days at the Durban Convention Centre on 13 and 14 July 2009.

Kick-starting small businesses

Sipho Mseleku, Chief Executive Officer of both the Chamber of Commerce and Industry of South Africa and the National African Federated Chamber of Commerce and Industry, had the following to say about giving help to entrepreneurs:

'Many entrepreneurs have excellent ideas, but lack the skills and information to be successful. They lack exposure and do not know how to access all the services available to them. Combining all the services into a one-stop shop would make it much easier to educate entrepreneurs and kick-start small businesses.'

In a recent interview with a Sunday Times Business reporter, Mseleku was critical of the way that government has structured its small business development initiatives. He referred to the Umsobomvu Youth Fund, which provides finance for young entrepreneurs; Khula Enterprise Finance, which provides banks with guarantees for loans; and Ntsika Enterprises, which offers information and mentoring services. While these organizations have all had some measure of success, disbursing many millions of rands of funding and creating more than a million jobs in the process, he says that an individual entrepreneur has to work with each organization separately, as well as the Department of Trade and Industry (DTI). This makes starting up a business difficult and complex, leaving entrepreneurs confused.

Mseleku suggests that these institutions could have a bigger impact if all their offerings were made available at one-stop, 'business opportunity centres'. He also mentioned that it is crucial for these centres to be located nationwide so that development is not limited to major centres. As it is, entrepreneurs are being forced into the big cities, leaving areas where small and medium enterprises (SMEs) could be making a big impact and not depriving them of investment and development.

Adapted from: "It's time to get our SME act together", by Nicholas Neveling.
(Sunday Times – Business Times)

RUBRIC TO ASSESS TASK 4: Case Study – Events and Catering CC Total marks 30

7	6	5	4	3	2	1
Outstanding achievement 80-100%	Meritorious achievement 70-79%	Substantial achievement 60-69%	Adequate achievement 50-59%	Moderate achievement 40-49%	Elementary achievement 30-39%	Not achieved 0-29%
Group Work 16-20 marks	Group Work 14-15 marks	Group Work 12-13 marks	Group Work 10-11 marks	Group Work 8-10 marks	Group Work 6-7 marks	Group Work 0-5 marks
Excellent mind map. Includes the four Ps of marketing. Shows planning and consultative process.	A Very good mind map. Includes the four Ps of marketing. Shows planning and consultative process.	Well drafted mind map. Includes the four Ps of marketing. Shows planning and consultative process.	Well drafted mind map. Includes the four Ps of marketing. Shows some planning and consultative process.	Poor mind map. Includes the four Ps of marketing. Lacks planning and consultative process.	Poor mind map. Does not include all the Ps of marketing. Lacks planning and consultative process.	Poor mind map. Does not include all the Ps of marketing. No planning and consultative process evident.
Poster: very creative, attractive and to the point, well directed to target market.	Poster: Attractive, to the point and well directed to target market.	Poster: attractive and to the point. No clear focus on target market.	Poster: Fairly well designed and to the point, but no clear focus on target market.	Poster: Not well designed. Only some focus given to the target market.	Poster: Poorly designed and is not appropriate to target market.	Poster: Does not meet the requirements.
Programme well designed and includes all the elements of time, topic, name of presenters, lunch and tea breaks.	Programme well designed and includes most of the elements of time, topic, name of presenters, lunch and tea breaks.	Programme well designed and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme design can be improved and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme lacks clarity and focus.	Programme designed very poorly and not structured in a logical manner	Programme is not structured and many of the key elements are missing
Individual Report 8-10 marks	Individual Report 7 marks	Individual Report 6 marks	Individual Report 5 marks	Individual Report 4 marks	Individual Report 3 marks	Individual Report 0-2 marks
Very well structured report with clear motivations.	Very well structured report with clear motivations.	A good report which demonstrates a positive attitude.	A fair report. Requires more input.	Needs to focus more on structure and content.	Poorly written report. Very little effort shown.	Poorly written and incomplete. No effort shown.

Name of Learner: _____

Activity	Marks
Group Work	
Report	
Total Marks	

ANNEXURE A

THE ECONOMIC CYCLE

Summing up

Economic systems like **capitalism** and **communism** have been developed to cater for the needs and wants of society. These systems determine how the economic activities in a country are carried out because they control the **factors of production** (**national resources, labour, capital and entrepreneurship**) and the provision of **goods and services**. Most economies are **market-driven** because governments allow the markets to determine what is produced. South Africa has a **mixed economy** which combines some of the benefits of communism and capitalism.

Money and goods flow in an economic cycle in the economy, from **households (consumers)** to **producers (businesses)** and then from producers to households. The **government** and the **foreign sector** are also part of an economic cycle.

The **foreign sector** is important in the South African economy because it provides a market for South African **exports** and it produces products and services that South Africa needs to **import**. **Investment** also comes from the foreign sector. The government sets up **trade agreements** with trading partners all over the world to encourage this type of trade, and controls imports to a certain extent by imposing **import tariffs**.

Supply and **demand** affect prices and they are closely linked. Demand usually increases when prices fall and fall when prices increase. **Competition** and **availability** may also affect demand. Producers want to supply at the highest prices that consumers are willing to pay as they need to earn **profits**, so they work out an **equilibrium price** for their goods. To earn a profit, producers need to know the **break-even** price of the goods that they wish to sell. Demand may be **elastic** or **non-elastic**.

Trade unions have played an important role in transforming the economy of South Africa. They have become stronger over the years and now have the legal right to **strike** and negotiate **better wages** and **working conditions** for their members. They also have a **political** role. Many trade unions are affiliated with bigger organisations like COSATU, Fedusa and Nactu.

The **national budget** has an important effect on the economy because the government **levies taxes** and has a programme of **expenditure**. The government collects **revenue** from individuals and businesses.

ANNEXURE B

SUSTAINABLE GROWTH AND DEVELOPMENT

Summing up

The government spends the tax money it collects from people and businesses according to a financial plan, called the **national budget**. The Minister of Finance plans the budget according to goals set by the state and tables his plan in Parliament in March every year. Since 1994 the main focus of government has been on promoting sustainable economic growth and development in the country to redress the inequalities in society.

As these efforts began to produce positive results, it becomes increasingly important that good **trading relationships** are developed with international markets. South Africa is also in a favourable position to partner with neighbouring countries to develop strong, vibrant economies and societies.

The **Reconstruction and Development Programme (RDP)** developed by the first government of national unity to address the inequalities created in South Africa's past has produced many inspiring success stories, but also receives a great deal of criticism.

A healthy growing economy gives people opportunities to build their personal wealth by **saving and investing** part of their incomes for future prosperity. At the same time, the accumulation of savings and investment in **financial institutions** – banks, insurance companies and property trusts – means that **large pools of capital** are available for investment in large projects.

Commercial and industrial properties, mining ventures, businesses of all sizes, are funded from these sources. Many **job opportunities** result from these developments, thus spreading the wealth-creating potential throughout many families and their communities. In this way, personal wealth-creating measures – savings accounts, investments in property, annuities and equities – all contribute to general **economic prosperity** and growth.

While many businesses turn to technology to improve on **productivity**, this can be a poor choice of strategy in a country like South Africa with its exceptionally high levels of unemployed citizens. Sophisticated technology often results in loss of jobs that are desperately needed. A better option is to find ways to improve **labour efficiency** through education, skills training and motivation; and also to look at ways to use existing equipment and machinery more effectively. **Globalisation** also offers opportunities to find new and bigger markets so that production costs can be reduced through practising **economies of scale**. The competition that an exporter faces in a global market means that productivity levels must constantly be observed and improved so that the prices and quality of goods remain competitive, to the benefit of consumers.

SADC

The Southern African Development Community (SADC) has been in existence since 1980, when it was formed as a loose alliance of nine majority-ruled States in Southern Africa known as the Southern African Development Coordination Conference. (SADCC), with the aim of co-ordinating development projects in order to lessen economic dependence on the then apartheid South Africa.

The founding Member States were: Angola, Botswana, Lesotho, Malawi, Mozambique, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

SADCC was formed in Lusaka, Zambia on April 1, 1980, following the Lusaka Declaration – Southern Africa: Towards Economic Liberation. The transformation of the organisation from a Coordination Conference into a Development Community (SADC) took place on August 17, 1992 in Windhoek, Namibia, when the Declaration was signed at the Summit of Heads of State and Government, thereby giving the organisation a legal charter.

The Member States are: Angola, Botswana, the Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

SADC headquarters are in Gaborone, Botswana.

The SADC Vision

The SADC vision is that of a common future, a future within a regional community that will ensure economic well-being, improvement in the standards of living and quality of life, freedom and social justice and peace and security for the peoples of Southern Africa. This shared vision is anchored on the common values and principles and the historical and cultural affinities that exist between the peoples of Southern Africa.

Restructuring of SADC Institutions

At an Extra-Ordinary Summit on March 9, 2001, in Windhoek, Namibia, approval was given to a Report on the Restructuring of SADC Institutions. This Report articulates a more explicit Common Agenda which takes into account a number of principles such as development orientation, subsidiarity, market integration and development, facilitation and promotion of trade and investment, and variable geometry.

Based on the above principles, SADC's Common Agenda includes:

- the promotion of sustainable and equitable economic growth and socio-economic development that will ensure poverty alleviation with the ultimate objective of its eradication;

- the promotion of common political values, systems and other shared values which are transmitted through institutions that are democratic, legitimate and effective; and
- The consolidation and maintenance of democracy, peace and security.

In contrast to the country-based coordination of sectoral activities and programmes, SADC has now adopted a more centralised approach through which the 21 Coordinating Units have been grouped into four clusters, namely:

- Trade, Industry, Finance and Investment;
- Food, Agriculture and Natural resources;
- Infrastructure and Services; and
- Social and human Development and Special Programmes.

GOALS OF THE RECONSTRUCTION AND DEVELOPMENT PROGRAMME

MEETING BASIC NEEDS

- Providing free basic services like water and electricity
- Providing housing and land subsidies for people living below a certain income level
- Subsidising farmers from historically disadvantaged backgrounds
- Improving public transport by providing subsidies for bus and rail transport through the taxi recapitalisation programme
- Improving infrastructure like roads, railways, hospitals and schools
- Ensuring a clean, safe environment
- Providing healthcare to people who cannot afford private healthcare
- Upgrading hospitals and equipment and training healthcare workers
- Providing social grants like pensions, child support and disability grants

DEVELOPING HUMAN RESOURCES

- Introducing programmes to improve education and training from preschool to tertiary level
- Starting arts, culture, sports and recreation programmes in poor communities
- Youth development programmes such as the Umsubomvu Youth Fund, learnerships and internships
- Improving skills by giving training using money from the Skills Development Levy

BUILDING THE ECONOMY

- Helping small businesses grow by giving them advice and financial support
- Helping industries grow so that they become internationally competitive and employ more people

- Increasing employment and skills development by contracting the unemployed to work on state-funded projects like the Expanded Public Works Programme
- Improving infrastructure such as power stations, dams, roads, railways, harbours, airports, housing, hospitals and schools

DEMOCRATISING THE STATE AND SOCIETY

- Ensuring democracy through regular elections
- Improving our access to rights and information through the Government Communication and Information Service (GCIS)
- Establishing Multi-Purpose Community Centres (Thusong Service Centres) so that people can get different government services in one place
- Employing thousands of community development workers (CDWs) to help people get access to services and opportunities
- Deepening democracy through izimbizos, ward committees, community police forums and school governing bodies

Since 1994 government has provided:

- More than 2 million houses for poor people
- Free schooling for about 5 million learners each year
- Monthly pensions or other social grants paid to over 12 million people
- Free basic water and electricity to most urban residents
- On average R500 a month worth of healthcare each to families without medical aids
- Free antiretroviral treatment for more than 250 000 people living with Aids

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izimbizos

ANNEXURE C

MANAGERIAL, CONSUMER AND FINANCIAL KNOWLEDGE AND SKILLS

Summing up

Read the following summary. Do you understand all the words in bold print? If you are not sure, go back and read about them again.

In this module you have learned about more detailed bookkeeping and accounting practices that involve summarising data from **source documents** in one or another **journal**. The journal chosen is either the **cash receipts journal**, **cash payments journal**, **debtors ledger**, **creditors journal**, or **creditors ledger** – depending the type of source document used. The totals from each journal are recorded in another book of accounts called a **general ledger** which, in turn, summarises all the incoming and outgoing transactions of the business. In other words, the general ledger holds the records of all the **assets** and **liabilities** of the business. Bookkeepers check the accuracy of their records in the general ledger by drawing up a **trial balance** before preparing financial statements for the business.

At the end of a regular period, usually the financial year of the business, the accountant of the business takes the trial balance figures prepared by the bookkeeper and draws up an **income statement** and a **balance sheet** for the period concerned. The information contained in these two financial statements are valuable to the owner and managers of the business because they accurately provide information about the financial standing of the business and help the owners and managers to make decisions about the future of the business. Comparisons are made using **ratios** to assess the **profitability**, **solvency** and **liquidity** of a business based on this information.

The module went on to explore the features, advantages and disadvantages of different **means of payment** in the economy. It examined various forms of **credit purchases** and considered the advantages of buying goods and services for **cash**.

Unit 4 looked at the impact of business on society and the environment. It also looked at the part played by public relations in a business concerned with **social responsibility** and **environmental responsibility**. The actions of businesses in working with communities can improve the lives of people in impoverished areas. You were given the opportunity to research the strategies of some South African organisations in the field of social and environmental responsibility.

And finally, the module closed with a brief overview of the laws in South Africa that provided the framework within which business employs its labour. The focus of this unit was on the **basic conditions of employment**, employment **equity** and **non-discrimination**, and **skills training**.

MEANS OF PAYMENT

People are usually worried about carrying large sums of money around with them, because of the risk of losing the money or being robbed. Let's look at alternative means of payment.

Debit cards and "smart" cards

Anyone who has a savings or cheque account can withdraw cash from that account at an ATM by using a special plastic card and PIN provided by the bank where the account is held.

A debit card or "smart" card enables you to use the ATM card at many shops to pay for your purchases. The shop assistant scans your card with a special scanning machine. This machine "phones" through to your bank. You then key in your secret PIN to authorize the payment. The money is transferred immediately from your bank account to that of the business! You sign a receipt to confirm that you have authorized the payment, and the transaction is complete. The drawer must have money in his or her banking account to be able to pay for purchases with a debit card. There are 160 countries worldwide that accept Visa debit cards.

A "smart" card is electronically encoded with the holder's personal information, and may also be used in many overseas countries. The black magnetic strip of the debit card has been replaced by a microchip, containing a huge amount of personal details like fingerprints, ID photos, banking details and so on.

The inside of a smart card usually contains an embedded microprocessor. It replaces the magnetic strip on a credit or debit card. The microprocessor is there for security. The host computer and card reader actually "talk" to the microprocessor. Different data can be placed on the "smart" card, to be used in the following cases:

- Computer security systems
- Wireless communication
- Banking
- Satellite TV
- Government identification

Cheques and overdraft facilities

People who have cheque (current) account facilities at a bank can pay for goods by cheque. This is also regarded as a cash payment, because the buyer's bank will pay the money into the seller's bank account according to the information written on the cheque. If the cheque is made out as "cash", the seller will be given cash by the buyer's bank.

The buyer can arrange with the bank for a certain amount of credit on his or her bank account. This facility is called an overdraft, and will cost the account holder interest on the overdrawn balance until he or she repays the money.

Postal orders

Sometimes people want to send money to someone in another city. The Post Office sells postal orders which the buyer then mails to the receiver of the money. The receiver can cash the postal orders at his or her local post office on presenting their

Page 29 of 40

identity book, and so get cash immediately. A postal order does not expire, so the payee can cash it at any time.

Money order

Very useful in case of emergencies. An instruction from one post office to another specified post office to pay a stated amount of money to a specific person, on presentation of his or her identity book.

Traveler's cheques

Like postal orders, anyone can buy travelers cheques from a bank or bureau of exchange. People who travel internationally buy travelers cheques in the currency of the country to which they are going, or in a generally accepted currency such as US dollars.

Stop orders

When a bank account holder gives instruction to his or her bank to pay a fixed amount from his/her account into another account at regular intervals, like once a month. This is very convenient if you need to pay a fixed amount every month to a creditor.

Internet transactions

The expansion of the internet has made it an ideal way to conduct commerce over large distances quickly. The internet is being used more and more to advertise and sell goods and services. You can pay by credit card, debit card, electronic cash or Smart Card.

Open and 6-month accounts

Many businesses will grant a regular customer an "open" account facility. This means that the customer can buy goods throughout the month and pay the account in full at the end of the month. No further credit is allowed until the account has been paid.

Many clothing stores, especially the chain stores, offer 6-month accounts. The customer gets a store card and the store sets a credit limit according to what the customer earns. Each month the customer pays one-sixth of the outstanding balance and is then able to buy further goods up to the credit limit. In this way, customers are tied into a 6-month revolving credit and it is very difficult to get out of this.

Failure to pay on time can also result in the credit limit being reduced, and the store can advise a credit bureau of the default, thus affecting the customer's credit rating in the future.

Installment sales

An installment sale (also called hire purchase or HP) is a method of buying goods where the purchaser takes possession of the goods as soon as he or she has paid a deposit to the seller. This is followed by an agreed number of installments (payments) until the full cost of the item, plus interest, has been paid. Ownership of the item will only transfer to the buyer once the final payment has been made. Cars and furniture are often bought in this way.

ANNEXURE D

ENTREPRENEURIAL KNOWLEDGE AND SKILLS

Summing up

All entrepreneurs think of good ideas for enterprises. But then they have to analyse their ideas to make sure they will work. To do this, they conduct **feasibility studies** in which they consider the **factors of production** like **capital, competition, materials, transport, labour** and possible **locations** for the business. Then they do a **SWOT** exercise to analyse the **strengths, weaknesses, opportunities** and **threats** to their idea (or their business if it is already up and running). After that some **market research**, perhaps in the form of a **questionnaire**, will help them understand what the market wants and needs.

Then a **business plan** is needed. This will help entrepreneurs to consolidate all aspects of the business and is needed by **financial institutions** when loans are negotiated. This plan consists of a description of the product and the business, a **budget**, a **marketing plan** and an **operational plan**. An entrepreneur should consider which **form of ownership** suits the business best – being a **sole proprietor**, working in a **partnership** or perhaps forming a **Closed Corporation**. When getting ready to market products, they should consider ways of **creating a demand** by making consumers aware of the products, by careful **pricing**, by **differentiating** the products from others on the market and by looking for **new markets**. Different **media**, like **newspapers, pamphlets, notice-boards** and the **radio** can be used to promote products.

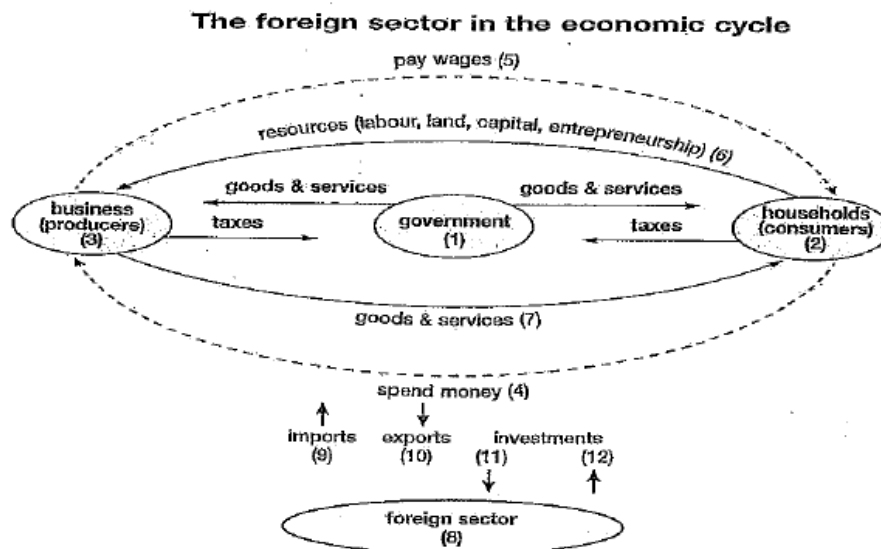
The government is also encouraging the formation of small, medium and micro enterprises (**SMMEs**). Several agencies have been set up to provide assistance in the form of business skills training and help with financial matters. **SMMEs** help to **create wealth** in the country because by **creating income** they enable consumers to support themselves and become part of the economic cycle. They also create **jobs** and help to bring down **unemployment**.

ANNEXURE E

RUBRIC TO ASSESS TASK 2: The National Budget and Government Spending

7	6	5	4	3	2	1
Outstanding achievement	Meritorious achievement	Substantial achievement	Adequate achievement	Moderate achievement	Elementary achievement	Not achieved
80-100%	70-79%	60-69%	50-59%	40-49%	30-39%	0-29%
24-30 marks	21-23 marks	18-20 marks	15-17 marks	12-14 marks	8-11 marks	0-8 marks
Well written and of correct length.	Fairly well written article of correct length.	Clear article of correct length.	Article not always clear, but has some structure.	Article is far too long or too short.	Poorly written article.	Poorly written and incomplete.
Demonstrated excellent understanding of government spending and priorities.	Demonstrated good understanding of government spending and priorities.	Demonstrated understanding of government spending and priorities.	Demonstrated a fair amount of understanding of government spending and priorities.	Demonstrated some understanding of government spending and priorities.	Demonstrated little understanding of government spending and priorities.	Demonstrated no understanding of government spending and priorities.
Accurately identified factors that discourage economic growth.	Good identification of factors that discourage economic growth.	Identified factors that discourage economic growth.	Fair identification of factors that discourage economic growth.	Some identification of factors that discourage economic growth.	Poor identification of factors that discourage economic growth.	No identification of factors that discourage economic growth.
Clearly stated contributions citizens can make towards economic growth and development.	Included good contributions citizens can make towards economic growth and development.	Included contributions citizens can make towards economic growth and development.	Included fair number of contributions citizens can make towards economic growth and development.	Included some contributions citizens can make towards economic growth and development.	Included the isolated contribution citizens can make towards economic growth and development.	Did not include any contributions citizens can make towards economic growth and development.

ANNEXURE F



ANNEXURE G**ALLAN'S FOOD MARKET**
Balance Sheet as at 31 March 2009

	NON CURRENT ASSETS					
	Tangible Assets	1				
	CURRENT ASSETS					
	Inventories (<i>Trading Stock</i>)					
	Trade and other receivables (<i>Debtors</i>)					
	Cash and cash equivalents	2				
	TOTAL ASSETS					
	OWNER'S EQUITY	3				
	NON-CURRENT LIABILITIES (<i>L/T Loan</i>)					
	CURRENT LIABILITIES					
	Trade and other payables	4				
	TOTAL EQUITY AND LIABILITIES					
1	Tangible Assets (<i>Fixed Assets</i>)		Land and Buildings	Equipment	Total	
	Cost price					
2	Cash and Cash Equivalents					
	Bank					
	Petty Cash					
3	Owner's Equity					
	Balance at beginning (1 March)					
	Net Profit					
	Drawings					
4	Trade and other payables					
	Creditors					

ANNEXURE H

RUBRIC TO ASSESS TASK 4: Case Study – Events and Catering CC

7	6	5	4	3	2	1
Outstanding achievement	Meritorious achievement	Substantial achievement	Adequate achievement	Moderate achievement	Elementary achievement	Not achieved
80-100%	70-79%	60-69%	50-59%	40-49%	30-39%	0-29%
Group Work 16-20 marks	Group Work 14-15 marks	Group Work 12-13 marks	Group Work 10-11 marks	Group Work 8-10 marks	Group Work 6-7 marks	Group Work 0-5 marks
Excellent mind map. Includes the four Ps of marketing. Shows planning and consultative process.	A Very good mind map. Includes the four Ps of marketing. Shows planning and consultative process.	Well drafted mind map. Includes the four Ps of marketing. Shows planning and consultative process.	Well drafted mind map. Includes the four Ps of marketing. Shows some planning and consultative process.	Poor mind map. Includes the four Ps of marketing. Lacks planning and consultative process.	Poor mind map. Does not include all the Ps of marketing. Lacks planning and consultative process.	Poor mind map. Does not include all the Ps of marketing. No planning and consultative process evident.
Poster: very creative, attractive and to the point, well directed to target market.	Poster: Attractive, to the point and well directed to target market.	Poster: attractive and to the point. No clear focus on target market.	Poster fairly well designed and to the point, but no clear focus on target market.	Poster not well designed. Only some focus given to the target market.	Poster: Poorly designed and is not appropriate to the target market.	Poster: Does not meet the requirements.
Programme well designed and includes all the elements of time, topic, name of presenters, lunch and tea breaks.	Programme well designed and includes most of the elements of time, topic, name of presenters, lunch and tea breaks.	Programme well designed and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme design can be improved and includes some elements of time, topic, name of presenters, lunch and tea breaks.	Programme lacks clarity and focus.	Programme designed very poorly and not structured in a logical manner	Programme is not structured and many of the key elements are missing
Individual Report 8-10 marks	Individual Report 7 marks	Individual Report 6 marks	Individual Report 5 marks	Individual Report 4 marks	Individual Report 3 marks	Individual Report 0-2 marks
Very well structured report with clear motivations.	Very well structured report with clear motivations.	A good report which demonstrates a positive attitude.	A fair report. Requires more input.	Needs to focus more on structure and content.	Poorly written report. Very little effort shown.	Poorly written and incomplete. No effort shown.

TOTAL MARKS 30

Name of Learner: _____

Activity	Marks
Group Work	
Report	
Total Marks	

Glossary

- annuity** – a fixed amount of money paid to somebody each year once it matures, usually for the rest of their life; a type of insurance that pays a fixed amount of money to somebody each year, a private pensions scheme
- assets** – items of value over which a business entity has control
- balance sheet** – statement that shows the financial position of the business by listing the assets and liabilities as at a specific date
- black market** – a system in which goods or currencies are sold and bought illegally, particularly in violation of rationing or state controls
- break-even price** – the price at which a business covers the cost of production of goods but does not make a profit
- budget** – a summary of probable income and expenses for a particular period; the total amount of money allocated to a particular project or department for a specified period
- business plan** – a complete plan of a proposed business
- capital** – an amount of money (or property) invested to start up a business and make more money
- capital growth** – an increase in the amount of money (capital) that is available for investment purposes
- capitalism** – an economic system in which trade and industry are controlled by private businesses which make profits
- capitalist** – a person who is in favour of capitalism, who uses money to make more money
- cash flow** – the movement of money into and out of a business
- cash payments journal** – a book of accounts in which all payments made by the organisation is recorded
- cash receipts journal** – a book of accounts in which all money received by the organisation is recorded
- close corporation** – a legal business association of between one and ten members
- commercial bank** – a bank that makes a profit from providing banking services
- communism** – an economic system in which property and businesses are owned by the community and not by individuals
- competitors** – people who sell the same products or services
- consumers** – people who buy and use goods and services to satisfy needs
- corporate tax** – tax on profits, paid by businesses to the government
- creditor** – a business or person from whom you have bought something on credit
- creditors journal** – a book of accounts in which expenses of the organisation are recorded on pages allocated to the person or organisation to which money is owed
- current assets** – assets used within the present business year or cycle
- debtors journal** – a book of accounts in which monies owed to the organisation are recorded on pages allocated to the person or organisation owing the debt
- debtors** – people who still owe money to the business for goods sold on account
- debtors ledger** – records the details of a credit sale – when trading stock or services are sold and payment is delayed to a future date
- demand** – the amount of a good that consumers are willing and able to buy at a specified price
- differentiating a product** – making it different from similar products of competitors
- direct costs** – the costs that can be directly attributed to the production of a good, such as raw materials and labour
- distribution** – moving goods from factories to wholesaler businesses and to retailers
- double-entry** – system of entry in which each payment appears twice, in different accounts, once as a credit and once as a debit. Each debit item must have a corresponding credit and the totals of all credit and debit entries must agree (be equal)
- economic growth** – an increase in the economic activity of a country which results in a rise in the standard of living
- economic integration** – removal of restrictions to the free flow of goods, services and production between partnering countries
- economic systems** – the way in which business and the economy of a country is organised, for example, capitalism and communism
- economies of scale** – reducing the cost of each item by producing larger quantities. More goods share the costs of capital investment and overheads, thus reducing the unit cost.
- economy** – an area in which production consumptions and exchange takes place

- efficiency** – doing something well with no waste of resources, such as time, materials or money
- employees** – supply labour in return for wages
- employers** – offer work opportunities
- employment opportunities** – job prospects; chances of finding paid work
- entrepreneur** – a person who identifies a need that can be satisfied with a business product
- equilibrium price** – the price at which a good would cover all costs involved in producing it, without making a profit for the business
- exchange rate** – the price of a currency expressed in terms of another currency
- excise duty** – tax paid to the government on things like alcohol and cigarettes
- expenditure** – money the government spends on health, education, safety, etc
- expenses** – money spent on buying things needed in a business
- exports** – goods or services that are produced in one country and sold for use in another country
- factors of production** – the physical, financial and human resources used in production
- factors of establishment** – the environmental factors that affect a new business
- feasible** – possible and likely to be achieved
- feasibility study** – an analysis of whether or not a business will make a profit
- financial institution** – a bank or organisation that lends and invests money
- financial yardstick** – financial standard used for comparison, usually on a monthly, quarterly or annual basis, or between similar businesses
- fixed assets** – things like buildings, vehicles and equipment that belong to a business and that last a long time
- fixed capital** – the money needed to start up a business (for example, to buy equipment) and keep it running
- fixed costs** – costs involved in production of income, which do not change regardless of how much or how little business is done, such as rent and insurances. Also called 'overheads'
- fixed deposit** – bank account where you invest money for a fixed period, for example, six months and early withdrawal will cost the investor money in penalty payments
- flow of money** – the way that money moves in an economic system between businesses, consumers, the government and other countries
- foreign exchange** – the money from other countries, which is used to pay for goods and services traded between different countries
- foreign sector** – other countries
- franchise** – the right to run a business using the name and ideas of an established business
- franchisee** – the person who buys into a concept and its systems and support mechanisms being sold by the franchisor
- franchisor** – the person or company selling a business concept and its support mechanisms
- free market** – country or group of countries that allow businesses to operate without state control or interference, and to trade without customs duties on goods
- free trade** – system of international trade in which there are no restrictions or taxes on imports and exports
- general ledger** – a book of accounts in which transaction summaries are recorded
- global economy** – the world economy
- globalisation** – the trend towards free trade between all countries in the world
- goals** – objectives, things to achieve
- goods** – products
- gross domestic profit (GDP)** – the total value of all the goods and services a country produces in one year
- gross national product (GNP)** – the total value of all the goods and services a country produces in one year, including the total income from foreign countries
- gross profit** – the difference between the income and expenses of a business, before tax
- gross profit percentage** – the gross profit calculated as a percentage of the expenses (investment)
- imports** – goods or services brought into one country that have been bought from another country
- impoverished** – made poor, usually by circumstances beyond the individual's control
- income** – also referred to as 'revenue', this is money earned by a business from sales of goods or from services rendered
- income statement** – a summary of business transactions over a period of time; shows total sales, gross profit, total expenses and net profit
- income tax** – tax that you pay on your income – the money you earn
- indirect costs** – expenses that cannot be directly attributed to the production of a

- good or service; fixed costs; overheads
- industrialism** – an economic and social system based on large-scale mechanised industry, rather than on agriculture or trade
- inflation** – a continuous rise in the general price level
- inflation rate** – the rate at which prices increase
- infrastructure** – the basic systems and services that are necessary for a country or organisation, for example, buildings, transport, water and power supplies, and administrative systems
- instalment sale agreements** – also called hire purchase, these contracts specify the size and frequency of payments for goods bought and paid for over an agreed period of time
- insurance** – an agreement in which you are compensated for possible losses in return for a payment made in advance
- interest** – money paid to someone who invests money, for example, in a bank, or money charged for borrowing money
- interest rates** – the money the bank pays you when you put your money in a bank
- investments** – longer-term savings and money put into businesses
- labour-intensive** – work that needs a lot of people to do it
- labour laws** – laws that protect workers from unsafe working conditions and exploitation
- legal tender** – currency that is recognised and useable in a particular country
- levies** – taxes imposed by the government, on fuel, for example
- liabilities** – claims that people (other than the owner/s) have against the assets of a business
- liquid** – sufficient money or easily convertible assets, to ensure the smooth day-to-day running of a business
- loan** – money borrowed and usually repaid with interest
- long-term goals** – goals that may take a few years to achieve
- loss** – when a business's expenses are higher than its income, it makes a loss
- margin** – the difference between the total cost of producing an item and the selling price; also called the 'profit margin'
- market** – trade, buying and selling goods, the environment or place in which things are bought and sold
- market economy** – an economy that responds to what the market (consumers) wants
- market research** – finding out what the market wants by doing research
- marketing strategy** – ways of encouraging people to buy a product
- marketing** – creating a demand for goods
- mark-up** – the sum added to the total cost of producing an item in order to arrive at a selling price; usually a percentage of the cost
- media** – newspapers, radio, television, magazines, posters
- mentor** – a wise or trusted adviser or guide
- mineral resources** – things that can be mined, such as gold or copper
- miscellaneous** – of various kinds
- mixed economy** – an economy that combines elements of communism, socialism and capitalism
- monopoly** – when one business controls a market by being the only producer of certain goods
- mortgage bonds** – a special type of loan made by banks and building societies to people who want to buy property, for example, land or a house
- national budget** – the government's budget
- national economy** – the financial workings of the country
- national resources** – mineral wealth, land, water, etc, that belong to a country
- net worth** – the difference between liabilities and assets of the business
- nominal** – being something in name only, and not in reality; minimal in comparison with real worth or what is expected
- operating expenses** – things that a company must pay to do business, such as electricity
- operational plan** – a plan which shows how a business is going to run (operate)
- opportunities** – circumstances that make something possible
- owner's equity** – the claim that the owner has against the assets of a business, after repaying any liabilities
- ownership** – who owns a business
- participation mortgage bonds** – a special type of mortgage bond issued up to 66% of the value of a commercial or factory building by a part bond company, with the remaining third of the required loan coming from investors for a period of five years. Each investor pays in a minimum of R1000 in return for a better than average rate of interest
- partnership** – a contractual relationship between two or more people, usually engaging in a business arrangement with a view to making a profit

- pension fund** – a fund where you put away money every month and get a pension (regular monthly income) when you retire
- pricing** – how goods are priced
- private company** – a business registered in terms of the Companies Act, 1973, consisting of up to fifty persons, each of whom owns a share of the business
- privately owned** – material goods or property that are owned by an individual
- private sector** – businesses owned by private people
- product awareness** – telling consumers about products
- productivity** – describes how quickly inputs can be turned into outputs for sale
- profit** – the income or reward received by an entrepreneur as a result of running a business
- profitability** – business actions that result in a profit
- prosperity** – the state of being successful, especially financially
- protectionism** – a country's trade policy that discourages imports by imposing duties or quotas on those imports, to protect local industries
- provident fund** – a fund where you put away money every month and get a lump sum when you retire
- public company** – a large business listed on a stock exchange. Unlimited numbers of individuals can become shareholders by buying stock in the business
- public sector** – the government or state
- quotas** – a restriction on imports that limits the quantity of imported goods that can be brought into a country during a specified period of time
- real returns** – returns that have been adjusted to allow for inflation during the period of investment
- retailers** – smaller shops that sell goods to the consumer
- return on investment** – the amount of interest that you can expect to receive for leaving money in bank
- revenue** – the money collected by the government from taxes
- South African Revenue Services (SARS)** – the government's tax collection department
- services** – products that you cannot see or touch, like banking and education
- shares** – a part of the equal parts into which the capital of a business is divided, entitling the investor a share of the profits as a dividend on the shares, as well as capital growth if the value of the business increases
- short-term goals** – goals that can be achieved quickly
- skills training** – training that provides people with skills
- SMME** – Small, Medium and Micro Enterprises
- social welfare programmes** – strategies undertaken by government to look after or improve the well-being of citizens unable to care adequately for themselves
- sole proprietor** – a person who is the single owner of a business
- solvency** – the ability to pay long-term debt
- source document** – the primary record of a business transaction
- start-up costs** – the total costs involved in starting a business, from conception to the point where the business begins to make a profit
- state ownership** – material goods or property that are owned by the state (government)
- stock** – goods that a business has manufactured or purchased
- stokvel** – an informal saving scheme
- strike** – when workers stop work in order to protest about something
- supply** – the provision of goods and services; the quantity of goods or services available to the market
- survey** – market research, asking people their opinions, finding out things
- sustainable** – growth and development that can be maintained over time as it does not use up natural resources that cannot be replaced
- SWOT analysis** – a study of strengths, weaknesses, opportunities and threats
- target market** – the people (or other businesses) who you hope will buy your product or service
- tariff** – a tax that is paid on goods coming into or going out of a country
- tax rates** – the rate or level of tax to be paid on income by individuals and businesses; the amount of tax paid depends on the amount earned
- trade agreement** – an agreement (usually between countries) that defines the terms of how business will be done
- trade union** – an association of employees formed to improve their incomes and working conditions by collective bargaining with the employer or employer organisations

trading partners – people with whom you trade, with whom you have a trading agreement

transaction – the action of buying or selling, conducting business

trial balance – a listing of the balances on all the accounts of an organisation with debit balances in one column and credit balances in the other. If the processes of double-entry book-keeping have been accurate, the totals of each column should be the same. If they are not the same, checks must be carried out to find the error

UIF – unemployment insurance fund (UIF) – a fund to which employers and employees contribute and from which employees can claim if they lose their jobs

unit trusts – an investment fund that pools investments from different people and then buys shares in companies listed on the stock exchange

value – the worth of something; an amount considered to be a fair exchange for a particular good or service

value added – the difference between the total input (expenses) and the total output (revenue or income) of a business

value added tax (VAT) – the difference between the total input (expenses) and the total output (revenue or income) of a business

variable costs – the expenses of a business that are directly related to the quantity of goods or services produced. Also called 'direct costs'

viability – profitability



education

Department:
Education
REPUBLIC OF SOUTH AFRICA

COMMON TASK ASSESSMENT (CTA)

GRADE 9 – 2009

ECONOMIC AND MANAGEMENT SCIENCES

MARKING GUIDELINES

SECTION B

Theme: General Elections - 2009

Time: 2 hours

100 marks

No of pages: 12

ANSWER GRID FOR QUESTION 1**1.1 Multiple choice****(10 X 1 = 10)**

1.1.1	D
1.1.2	B
1.1.3	C
1.1.4	C
1.1.5	B
1.1.6	A
1.1.7	D
1.1.8	B
1.1.9	A
1.1.10	B

1.2 Match Column B to Column A**(5 X 1 = 5)**

1.2.1	F
1.2.2	D
1.2.3	A
1.2.4	B
1.2.5	C

1.3 True or False**(5 X 1 = 5)**

1.3.1	True
1.3.2	True
1.3.3	False
1.3.4	True
1.3.5	False

1.4 Fill in the Missing Word**(5 X 1 = 5)**

1.4.1	Cash Payments Journal
1.4.2	Hire purchase
1.4.3	Mixed
1.4.4	Loss
1.4.5	National

QUESTION 2 (LO1 AS 1, 2, 4 & 5) (LO2 AS 1, 2, & 3)**CASE STUDY: Solly's Mini Baker**

2.1 Identify any **TWO** of the four factors of production (the inputs) in Solly's business.

Give an example for each of the **TWO** factors of production you identified.

The examples must relate to the case study. (4)

1. **Labour:** *The workers who work at the bakery and they get paid salaries and wages.*
2. **Capital:** *Money invested by owner and investment.*
3. **Natural Resources:** *Water and all the ingredients used such as flour, butter, oil, eggs, sugar, yeast, icing sugar (please note that the ingredients are by products however for the purpose of the case study accept the ingredients).*
4. **Entrepreneurship:** *Solly is the entrepreneur, he identified "needs and wants" and set up a business*

- *For identifying the factor any TWO factors: (1 +1) 2 Marks*
- *For giving an example for each of the TWO factors of production in context to the case study: (1 +1) 2 Marks*

TOTAL MARKS for this question: 4

2.2 What are the outputs of Solly's business? (2)

The outputs are sponge cakes, bread, rolls, red cakes and scones.

- *For identifying the outputs: 1 Mark*
- *If the answer is given in a full sentence: 1 Mark*

2.3 How is Solly contributing towards the Reconstruction and Development

Programme? (2)

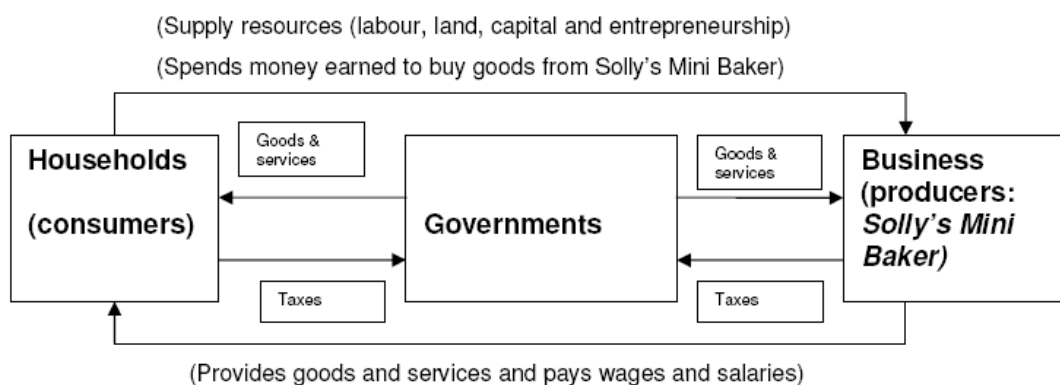
- *He is meeting the needs and wants of the households (customers).*
- *Providing jobs*
- *Developing skills by training his staff*
- *Practising good work ethics*

For any TWO of the above answers: (1 +1) 2 Marks

(Any suitable response from the learner may be considered provided it relates to the case study.)

2.4 Draw a flow diagram to explain the flow of money to and from Solly's

Business. (9)

**Explanation notes for teacher:**

- *Households are consumers but they also supply resources to the business such as labour, land, capital and entrepreneurship. With regards to the case study the households provide labour and also purchase the goods from Solly's Mini Baker.*
- *Business provides goods and services and pays for labour (salaries and wages).*

- *Government provides goods and services. In this case the government provides small entrepreneurs opportunities by placing them on the suppliers data base, training, financial support etc.*
- *Businesses and households pay taxes to the government. Households pay PAYE and VAT. Businesses pay company tax.*

Allocation of Marks:

- *For identifying the role players: Household; Government and Businesses
3 Marks*
- *For correctly identifying flow of resources from the household to business: 1 Mark*
- *For showing the flow of wages/salaries from business to household:
1 Mark*
- *For showing the flow of goods and services from businesses to Households: 1 Mark*
- *For showing the flow of money (money spend) from households to Businesses: 1 Mark*
- *For showing the flow of goods and services from government to households and from government to businesses: 1 Mark*
- *For showing the flow of taxes from the households and business to Government: 1 Mark*

Total marks awarded for the diagram: 9 Marks

2.5 Do you think Solly's workers belong to a Trade Union? Give reasons for your answer. (3)

Open ended. Learners can respond YES or NO. Any suitable response from the learners can be accepted provide it relates to the case study: 3 Marks

2.6 Will Solly attract an investor from overseas? Explain your answer. (3)

No, the business is too small to attract a foreign investor at this stage.

For saying “No”: 1 Mark

For giving reasons: 2 Marks

2.7 How does Solly contribute as an individual to the National Budget? (1)

He pays PAYE and VAT.

For any ONE of these two answers: 1 Mark

2.8 How does Solly contribute to a business to the National Budget? (1)

He pays company TAX and VAT.

For any ONE of these two answers: 1 Mark

QUESTION 3 (LO3 AS 1 & 5)

You are the financial manager of **Tobelo Trading**.

The bookkeeper has presented you with the following information:

Sales	R65 000
Cost of goods sold	R33 000
Interest received	R 2 000
Interest paid	R 1 500
Rent expenses	R 7 000
Wages and salaries	R 3 400
Telephone	R 500
Stationery	R 400
Security	R 1 000
Advertising	R 3 000

3.1 Explain why a business would receive interest? (2)

The business will receive interest on a favourable bank balance or fixed deposit.

For favourable bank balance: 1 Mark

For fixed deposit: 1 Mark

3.2 List one expense of the business. (1)

1 Mark for any ONE of the following:

- ***Rent expenses***
- ***Wages and salaries***
- ***Telephone***
- ***Stationery***
- ***Security***
- ***Advertising***

3.3 Does this business employ staff? How can you tell? (1)

Yes, it pays wages and salaries: 1 Mark

3.4 Does the business own its own premises? Give a reason. (2)

No, it does not own its own premises because it pays rent.

For stating “No”: 1 Mark

For giving a reason: 1 Mark

- 3.5 Prepare the **Income Statement for the year ended 30 June 2009.**
(Narrative method). (16)

For answers refer to Income Statement Template on page 9.

- 3.6 Has the business made a profit or a loss? (1)

The business made a profit: 1 Mark

***(According to the Income Statement the business had a net profit of
R17 200-00 for the year)***

- 3.7 How could this business either improve its profit or decrease its loss?
Discuss two options. (2)

1 Mark for any TWO of the answers given below:

- ***Reduce the expenses***
- ***Increase sales***
- ***Any suitable response from learner in the context of the scenario.***

(1 + 1) 2 Marks

3.5 Tobelo Trading
Income Statement for the year ended

Sales		65 000	00	✓
Cost of Sales		(33 000	00)	✓
Gross Profit		32 000	00	✓
Other operating income		0	00	
Rent income		0	00	
Gross Operating Income		32 000	00	✓
Operating Expenses		(15 300	00)	✓
Wages and Salaries		3 400	00	✓
Telephone		500	00	✓
Stationery		400	00	✓
Security		1 000	00	✓
Rent		7 000	00	✓
Advertising		3 000	00	✓
Operating profit for the year		16 700	00	✓
Interest Income		2 000	00	✓
Net profit after interest		18 700	00	✓
Interest expenses		(1 500	00)	✓
Net Profit for the year		17 200	00	✓

Total marks (16)

QUESTION 4 (LO4 AS 1, 4 & 5)

4.1 A SWOT analysis helps the entrepreneur to test his/her ideas.

Read through the following scenarios and indicate whether it is a strength, weakness, opportunity or threat. Write only the number and your answer next to it. For example: 4.1.6 Strength.

4.1.1 Skilled and experienced workers (1)

- **Strength: 1 Mark**

4.1.2 Decrease in the rate of income tax (1)

- **Opportunity: 1 Mark**

4.1.3 Insufficient capital and equipment (1)

Weakness or Threat (Either one is correct.): 1 Mark

4.2 “Market research decreases the risk of a business.”

4.2.1 Do you agree with this statement? Motivate your answer with two reasons. (3)

For a “Yes” answer: 1 Mark

For any TWO of the following reasons: (1+1) 2 Marks

Market research helps to identify :

- **competition**
- **how much capital will be needed to start the business**
- **location of the business**
- **transport and accessibility to target market**

- *how many people need to be employed*
- *kind of service required*
- *any other suitable reason ...*

4.3 What is a questionnaire? (2)

- *A questionnaire is a document which contains a list of questions which helps the entrepreneur to find out what the target market (potential customers) wants and needs.*

For any such suitable definition: 2 Marks

4.4 Case Study: *Hair by Tembi*

4.4.1 Before Tembi opened her two new salons what was her target market? (1)

- *Local people from Alexander Town Ship and Johannesburg: 1 Mark*

4.4.2 Who is her potential target market now? (2)

- *Tourists: 1 Mark*
- *Foreign dignitaries who were invited by the President's office for the Inauguration of the new State President: 1 Mark*

Allow for learner's insight. Should the learner identify a different target market see how relevant it is to the case study. If it is relevant, award the marks to the learner.

- 4.4.3 Use the **Four P's of marketing** and design a poster to advertise the services of *Hair by Tembi*. The poster must be completed on page 17 in pencil. You must take into account the new developments mentioned in the case study. (14)

Use the rubric on page 16 in the learner's book to assess the learner. Make sure that all the criteria are met in terms of the rubric to award the 14 marks.

Rubric to assess 4.4.3 - Hair by Tembi

Criteria	Marks	Learner's achievement
<p><i>The Four P's of Marketing is clearly identified and used in the correct context. The Four P's of Marketing are:</i></p> <ol style="list-style-type: none"> <i>1. Promotion</i> <i>2. Product</i> <i>3. Price</i> <i>4. Place</i> <p><i>The poster must incorporate all four P's for the learner to be awarded the full 8 marks.</i></p>	8	
<i>Heading is clear and bold.</i>	2	
<i>The advert is effective.</i>	2	
<i>The advert is neat and easy to read.</i>	2	
Total Marks	14	

TOTAL MARKS: 100

APPENDIX L

ASSESSMENT

GRADE 9

TERM	LO and AS	ASSESSMENT TASK	FOCUS/CONTENT	FORMS OF ASSESSMENT	CONTEXT
1	LO 3 AS 1 AS 3 AS 6 AS 4 AS 5	Financial literacy	Basic income statement for service and retail businesses Journals - CRJ - CPJ - Debtors journal - Creditors journal Ledgers - General - Debtors - Creditors Posting to the ledger Trial Balance Income statement and balance sheet Analysis of financial statements Keyboard skills Forms of credit purchases Different means of payment Different flows of money – factors of production, goods and services Role of the foreign sector in economic cycle	Case study Simulation Controlled test	Financial management
	LO 1 AS 1 AS 2				

GRADE 9

2	<p>LO 4 AS 1 AS 2 AS 3 AS 4 AS 5</p> <p>LO 3 AS 2</p> <p>LO 1 AS 3</p>	<p>Entrepreneurial knowledge and skills</p>	<p>Swot analysis Business ideas to meet the need for manufactured goods Develop business plan (including budget) for tourism enterprise Engage in business activity Choosing a form of ownership Conduct marketing campaign Research the role of SMME Investigate Public relations, social responsibilities and environmental responsibility strategies Graphical illustration of influence of prices on demand and supply</p>	<p>Assignment Project Controlled test/exam</p>	<p>Entrepreneurship</p>
3	<p>LO 1 AS 5 AS 4 LO 3 AS 7</p> <p>LO 2 AS 1 AS 2 AS 3 AS 4</p>	<p>Economic growth and how it can be sustained</p>	<p>The influence and actions (strikes and stayaways) of trade unions during the apartheid era Effect of national budget on the economy Laws affecting basic conditions of employment How national budget can be used to facilitate sustainable growth and development Successes and shortcomings of the RDP Role of savings and investments in economic prosperity and growth Effect of productivity on economic prosperity</p>	<p>Debate/elective Presentation Controlled test</p>	<p>Economic issues</p>
4	ALL	CTA	CTA	CTA	