Citrus Business Management Programme

Module 10

Present your Competence

Assessor Guide

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Grower levies working for you!

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Contents

Assessor Orientation

Background Information

The following exit level outcomes are covered by this learning programme:

1. Demonstrate an ability to identify and create a new venture.
    1.1. An understanding is demonstrated of the importance of a paradigm shift from a job-seeking attitude to a business opportunity seeking attitude.
    1.2. Business opportunities are identified and evaluated in terms of its potential viability.
    1.3. Problem-solving techniques and principles are applied within a business start-up and operation context.
2. Demonstrate knowledge of interpersonal skills required in a business environment.
    2.1. An understanding is demonstrated of the concept of group dynamics.
    2.2. An understanding is demonstrated of the characteristics of effective teamwork.
    2.3. An understanding is demonstrated of various networking principles and techniques.
    2.4. Potential personal limitations, abilities and expectations are identified for self-developmental purposes.
3. Demonstrate an understanding of basic economics within a market economy.
    3.1. An understanding is demonstrated of new venture financing sources and opportunities.
    3.2. An understanding is demonstrated of the principles of micro and macroeconomics.
    3.3. Potential threats and opportunities within the economic environment are identified for future business decision making.
    3.4. An understanding is demonstrated of business competitiveness.
4. Manage a new venture by applying business principles and techniques.
    4.1. A business plan for a new venture is developed using strategic planning principles and techniques.
    4.2. Guidelines for the implementation and monitoring the strategic action plan are formulated in terms of milestones and timeframes.
    4.3. Financial management planning principles and techniques are applied in order manage the business in an efficient and effective manner.
    4.4. Production and / or operations management is applied in a chosen business opportunity.
    4.5. Sound human resources management techniques are applied in order to set up a productive and motivated workforce for a business.
    4.6. Administrative principles and procedures are applied for sound administration and recordkeeping.

5. Demonstrate an understanding of the role of leadership and management.
    - 5.1. Knowledge is demonstrated of how management and leadership principles are applied to improve business effectiveness and efficiency.
    - 5.2. Knowledge is demonstrated of the differences between leadership and management in terms of managing a business.
    - 5.3. Knowledge is demonstrated of leadership and management styles in relation to their impact on business performance.
    - 5.4. Leadership and management principles and techniques are applied in order to enhance business performance.

Unit Standard Information

information

Unit Standard References

The SAQA registered unit standard associated with this learning programme is included below for your information.

Please do not hesitate to ask the facilitator or assessor to explain anything that you do not understand or need help with.

Associated Qualification

Further Education and Training Certificate: New Venture Creation

<table>
<tr><th>SAQA QUAL ID</th><th colspan="4">QUALIFICATION TITLE</th></tr>
<tr><td>66249</td><td colspan="4">Further Education and Training Certificate: New Venture Creation</td></tr>
<tr><th colspan="5">ORIGINATOR</th></tr>
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<tr><th colspan="3">PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY</th><th colspan="2">NQF SUB-FRAMEWORK</th></tr>
<tr><td colspan="3">SERVICES - Services Sector Education and Training Authority</td><td colspan="2">OQSF - Occupational Qualifications Sub-framework</td></tr>
<tr><th>QUALIFICATION TYPE</th><th colspan="2">FIELD</th><th colspan="2">SUBFIELD</th></tr>
<tr><td>Further Ed and Training Cert</td><td colspan="2">Field 03 - Business, Commerce and Management Studies</td><td colspan="2">Generic Management</td></tr>
<tr><th>ABET BAND</th><th>MINIMUM CREDITS</th><th>PRE-2009 NQF LEVEL</th><th>NQF LEVEL</th><th>QUAL CLASS</th></tr>
<tr><td>Undefined</td><td>149</td><td>Level 4</td><td>NQF Level 04</td><td>Regular-Unit Stds Based</td></tr>
<tr><th colspan="2">REGISTRATION STATUS</th><th>SAQA DECISION NUMBER</th><th>REGISTRATION START DATE</th><th>REGISTRATION END DATE</th></tr>
<tr><td colspan="2">Reregistered</td><td>SAQA 10105/14</td><td>2015-07-01</td><td>2018-06-30</td></tr>
<tr><th colspan="2">LAST DATE FOR ENROLMENT</th><th colspan="3">LAST DATE FOR ACHIEVEMENT</th></tr>
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2019-06-30	2022-06-30

In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.

This qualification replaces:

Qual ID	Qualification Title	Pre-2009 NQF Level	NQF Level	Min Credits	Replacement Status
23953	Further Education and Training Certificate: New Venture Creation (SMME)	Level 4	NQF Level 04	162	Complete

PURPOSE AND RATIONALE OF THE QUALIFICATION

Purpose:

The purpose of the Qualification is to develop the appropriate skills and knowledge required by a person for the establishment and development of a small to medium business venture, and address the economic, administrative and behavioural (psycho-social) barriers that contribute to success in starting and sustaining the venture.

This qualification is intended for persons who wish to start, operate, manage and grow a new small to medium business venture. Learners attempting this qualification will be equipped with a variety of technical, business managerial and personal skills and strategies to help them succeed in the creation and sustenance of a business. The successful learner will develop a sound foundation for the application of these skills and knowledge to explore a diverse range of entrepreneurial opportunities.

Recipients of this qualification will be able to:

- Demonstrate an ability to identify and create a new venture.
- Demonstrate knowledge of interpersonal skills required in a business environment.
- Demonstrate an understanding of basic economics within an market economy.
- Manage a new venture by applying business principles and techniques.
- Demonstrate an understanding of the role of leadership and management.

Rationale:

This Qualification will meet the needs of the formal and in-formal Small, Micro and Medium Enterprise Sector by providing training standards against which entrepreneurs can be trained. This Qualification meets the needs of society by, primarily, providing persons who are able to apply the fairly complex knowledge and skills required to be an entrepreneur and thus contribute to the economic upliftment of themselves, their community and thereby the nation as a whole. Alternatively this Qualification is also attractive to persons who have not received formal training in this Sector but who are are already managing and/or are working as employees within an established Small, Micro and Medium Enterprise business.

This Qualification contributes to an integrated National Qualifications Framework; provides for access, mobility and progression within the Small, Micro and Medium Enterprise Sector; enhances the quality of training for entrepreneurs; allows for the redress of past and contributes to the development of the learner entrepreneurs.

The majority of the learners attempting this qualification are likely to be unemployed persons who, via a learnership, have been identified and selected as having the potential to create a new business venture. With this Qualification and the established of a Small, Micro and Medium Enterprise provides the learner access to further learning opportunities at NQF Level 5 in Business Consulting Practice and Business Advising.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

It is assumed that the learner has the following knowledge and skills:

- Communication at NQF Level 3.

- Mathematical Literacy at NQF Level 3.

Recognition of Prior Learning:

This Qualification makes the Recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Qualification. Recognition of Prior Learning will be done by means of an Integrated Assessment as mentioned in the previous paragraph.

This Recognition of Prior Learning may allow:

- For accelerated access to further learning.
- Gaining of credits towards a unit standard.
- For full or partial recognition of the Qualification.

All recognition of Prior Learning is subject to quality assurance by the relevant accredited Education, Training, Quality, and Assurance Body and is conducted by a registered workplace assessor. Because the standards are only core and fundamental, these standards may have been acquired in a range of economic sectors and these will be recognized as appropriate.

Access to the Qualification:

There is an open access to this qualification, keeping in mind the "Learning Assumed to be in Place".

RECOGNISE PREVIOUS LEARNING?

Y

QUALIFICATION RULES

The Qualification consists of a Fundamental, a Core and an Elective Component.

To be awarded the Qualification learners are required to obtain a minimum of 149 credits as detailed below.

Fundamental Component:

The Fundamental Component consists of Unit Standards in:

- Mathematical Literacy at NQF Level 4 to the value of 16 credits.
- Communication at NQF Level 4 in a First South African Language to the value of 20 credits.
- Communication in a Second South African Language at NQF Level 3 to the value of 20 credits.

It is compulsory therefore for learners to do Communication in two different South African languages, one at NQF Level 4 and the other at NQF Level 3.

All Unit Standards in the Fundamental Component are compulsory.

Core Component:

The Core Component consists of Unit Standards to the value of 82 credits all of which are compulsory.

Elective Component:

The Elective Component consists of individual unit standards from which the learner must choose unit standards totalling a minimum of 11 credits.

EXIT LEVEL OUTCOMES

1. Demonstrate an ability to identify and create a new venture.

2. Demonstrate knowledge of interpersonal skills required in a business environment.

3. Demonstrate an understanding of basic economics within an market economy.

4. Manage a new venture by applying business principles and techniques.

5. Demonstrate an understanding of the role of leadership and management.

Critical Cross-Field Outcomes:

This qualification promotes, in particular, the following Critical Cross-Field Outcomes:

Identifying and solving problems in which responses display that responsible decisions using critical and creative thinking have been made when:

- Demonstrating an ability to identify and create a new venture.
- Demonstrating knowledge of interpersonal skills required in a business environment.
- Managing a new venture by applying business principles and techniques.
- Demonstrating an understanding of the role of leadership and management.

Working effectively with others as a member of a team, group, organisation, and community during:

- The identification and creation of a new venture.
- The management of a new venture.

Organising and managing oneself and one's activities responsibly and effectively when:

- Demonstrating an ability to identify and create a new venture.
- Managing a new venture.

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion when:

- Demonstrating an ability to identify and create a new venture.
- Demonstrating knowledge of interpersonal skills required in a business environment.
- Managing a new venture by applying business principles and techniques.

Collecting, analysing, organising and critically evaluating information to better understand and explain:

- An understanding of basic economics within an market economy.
- An understanding of the role of leadership and management.

Using science and technology effectively and critically, showing responsibility towards the environment and health of others when:

- Demonstrating an ability to identify and create a new venture.
- Demonstrating an understanding of basic economics within an market economy.
- Managing a new venture by applying business principles and techniques.

Demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation when:

- Demonstrating an understanding of basic economics within an market economy.

ASSOCIATED ASSESSMENT CRITERIA

Associated Assessment Criteria for Exit Level Outcome 1:

1.1 An understanding is demonstrated of the importance of a paradigm shift from a job-seeking attitude to a business opportunity seeking attitude.
1.2 Business opportunities are identified and evaluated in terms of its potential viability.
1.3 Problems-solving techniques and principles are applied within a business start-up and operation context.

Associated Assessment Criteria for Exit Level Outcome 2:

2.1 An understanding is demonstrated of the concept of group dynamics.
2.2 An understanding is demonstrated of the characteristics of effective team work.
2.3 An understanding is demonstrated of various networking principles and techniques.

2.4 Potential personal limitations, abilities and expectations are identified for self developmental purposes.

Associated Assessment Criteria for Exit Level Outcome 3:

3.1 An understanding is demonstrated of new venture financing sources and opportunities.
3.2 An understanding is demonstrated of the principles of micro and macro economics.
3.3 Potential threats and opportunities within the economic environment are identified for future business decision making.
3.4 An understanding is demonstrated of business competitiveness.
• Range: Business competitiveness includes but is not limited to factors such as inflation, exchange rates, interest rates, economic indicators and competition.

Associated Assessment Criteria for Exit Level Outcome 4:

4.1 A business plan for a new venture is developed using strategic planning principles and techniques.
4.2 Guidelines for the implementation and monitoring the strategic action plan are formulated in terms of milestones and timeframes.
4.3 Financial management planning principles and techniques are applied in order manage the business in an efficient and effective manner.
4.4 Production and/or operations management is applied in a chosen business opportunity.
4.5 Sound human resources management techniques are applied in order to set up a productive and motivated workforce for a business.
4.6 Administrative principles and procedures are applied for sound administration and record-keeping.

Associated Assessment Criteria for Exit Level Outcome 5:

5.1 Knowledge is demonstrated of how management and leadership principles are applied to improve business effectiveness and efficiency.
5.2 Knowledge is demonstrated of the differences between leadership and management in terms of managing a business.
5.3 Knowledge is demonstrated of leadership and management styles in relation to their impact on business performance.
5.4 Leadership and management principles and techniques are applied in order to enhance business performance.

Integrated Assessment:

Because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the Qualification. Learning, teaching and assessment are inextricably linked. Whenever possible, the assessment of knowledge, skills, attitudes and values shown in the unit standards should be integrated.

Assessment of the communication, language, literacy and numeracy should be conducted in conjunction with other aspects and should use authentic new venture creation contexts wherever possible.

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

The term 'Integrated Assessment' implies that theoretical and practical components should be assessed together. During integrated assessments the assessor should make use of formative and summative assessment methods and assess combinations of practical, applied, foundational and reflective competencies.

Assessors and moderators should make use of a range of formative and summative assessment methods. Assessors should assess and give credit for the evidence of learning that has already been acquired through formal, informal and non-formal learning and work experience.

Assessment should ensure that all Specific Outcomes, Essential Embedded Knowledge and Critical Cross-Field Outcomes are assessed. The assessment of the Critical Cross-Field Outcomes should be integrated with the assessment of Specific Outcomes and Essential Embedded Knowledge.

Directions

Please note that there is a separate portfolio of evidence (PoE) guide for the learner. The learner must use this guide to prepare himself / herself for the assessment.

The PoE guide contain all necessary activities and instructions that will enable the assessor and learner to gather evidence of the learner's competence as required by the unit standard.

The guide was designed to be used by a trained and accredited assessor who is registered to assess this specific unit standard as per the requirements of the AgriSETA ETQA.

Prior to the delivery of the programme, the facilitator and assessor must familiarise themselves with the content of the guide. The assessor, facilitator and learner must plan the assessment process together in order to offer the learner the maximum support and the opportunity to reflect competence.

The policies and procedures that are applicable during the execution of this assessment are available on the website of the Citrus Academy, contained in a document named Policies and Procedures for Assessment, and must be strictly adhered to. The assessor must familiarise himself with this document before proceeding.

The step-by-step instructions are conducted in concert with the steps described in the learner assessment guide. The steps are as follows:

Step	Description	Timeframe
1	Pre-assessment briefing	Before delivery of program
2	Diagnostic assessment of learning assumed to be in place	Before delivery of program
3	Assessment plan for gathering of evidence	Before delivery of programme
4	Learner formative assessment activities (formative PoE guide)	During delivery of program, assessment after delivery of program
5	Learner summative assessment activities (summative PoE guide)	After delivery of program
6	Learner declaration of authenticity	Before delivery of programme
7	Learner feedback and redirected learning	After delivery of program
8	Re-assessment procedures	After completion of assessment
9	Documentation and administration	After completion of assessment

Step 1: Pre-Assessment Briefing

A pre-assessment briefing for learners is held before the delivery of the program. Use the checklist provided in the PoE guide to ensure that all relevant points are addressed and discussed with the learners.

Step 2: Diagnostic Assessment

During this step, you must confirm that the learner:

- Is ready for assessment
- Has completed all the necessary learning activities to prepare for assessment
- Has completed all the prior learning to qualify them for entry to this assessment

Record your confirmation in your administration and the report to be submitted to the moderator.

Step 3: Assessment Plan for Gathering of Evidence

An assessment plan for this unit standard has been drafted in the PoE guide. Explain the plan to the learner and complete the dates and signatures as indicated.

Step 4: Learner Summative Assessment Activities (Summative PoE Guide)

Before the summative activities are undertaken, the learner must be reminded of what is expected from him / her in terms of summative and reflexive competence. Read and explain to the learner this section in the summative PoE guide. The learner and assessor must sign off this section to acknowledge that this step was completed.

Ensure that you apply the exact same methodology for each learner in order to ensure that the principles of good assessment are adhered to. Only a suitably qualified and registered assessor who is ALSO a subject matter expert in this specific field can mark the assessment tool for learner assessment.

Step 5: Learner Declaration of Authenticity

The learner is requested to complete and sign the declaration of authenticity in the summative PoE guide. This should be checked and co-signed by the assessor. Please remember that this is a legal document and that it should be completed as prescribed.

Step 6: Learner Feedback and Redirected Learning

In this step, you must give feedback to the learner on the assessment process and redirect learning if the learner is not yet competent. You must also gather feedback from the learner in order to improve future learning.

Evidence Matrix

Unit Standard No:	Unit Standard Title:	NQF Level	Type	Credits Achieved
66249	Further Education and Training Certificate: New Venture Creation	4	ELO	149

ELO	Key point in presentation (with allocated value)	Total value available	Actual value scored	Feedback
1. Demonstrate an ability to identify and create a new venture.	Give an overview of your choice of new business in the citrus sector that you would start. (1)	1		
1.1. An understanding is demonstrated of the importance of a paradigm shift from a job-seeking attitude to a business opportunity seeking attitude.	Explain how the priorities and perspectives of an entrepreneur differ from a salaried employee. (2)	2		
1.2. Business opportunities are identified and evaluated in terms of its potential viability.	Describe some of the different business options you examined before choosing the one you did. (1) Explain what criteria you used to evaluate each option. (2) Explain how you decided which option was most viable. (1)	4		
1.3. Problem-solving techniques and principles are applied within a business start-up and operation context.	Explain why you think it is important for an entrepreneur to understand problem-solving techniques and principles when they start and run a new business. (1) Give at least 2 examples of the type of problems an entrepreneur may encounter and what possible problem-solving technique or principle they may apply to solve the problems posed. (4)	5		
The candidate should score at least 6 out of a possible 12 points to be declared competent in this ELO		**12**		
2. Demonstrate knowledge of interpersonal skills required in a business environment.	Explain what you understand the term ‘interpersonal skills’ to mean. (1)	3		

ELO	**Key point in presentation (with allocated value)**	**Total value available**	**Actual value scored**	**Feedback**
	Explain how an entrepreneur could display good interpersonal skills, by using an example from your workplace. (2)			
2.1. An understanding is demonstrated of the concept of group dynamics.	Explain the concept of group dynamics with an example from your workplace or work team. (2)	2		
2.2. An understanding is demonstrated of the characteristics of effective teamwork.	Give an overview of the characteristics of an effective work team. (You may use examples from your workplace to illustrate or highlight specific characteristics). (3)	3		
2.3. An understanding is demonstrated of various networking principles and techniques.	Explain what you understand the term 'networking' to mean (in terms of entrepreneurship). (1) Give at least two examples of networking principle and / or techniques that you could apply when starting a new business in the citrus sector. (2)	3		
2.4. Potential personal limitations, abilities and expectations are identified for self-developmental purposes.	Explain why it is important for an entrepreneur to know and understand their own personal limitations. (1) Give at least two examples of personal abilities you had identified during the course of the learning programme, that make you a good entrepreneur. (2) Give an overview of your personal expectations in terms of the success of your business. (1)	4		
The candidate should score at least 8 out of a possible 15 points to be declared competent in this ELO		**15**		
3. Demonstrate an understanding of basic economics within a market economy.	In order to operate a business within a market economy, it is important for the entrepreneur to understand certain key economic principles.	1		

ELO	Key point in presentation (with allocated value)	Total value available	Actual value scored	Feedback
	Explain what you understand the term 'market economy' to mean (1)			
3.1. An understanding is demonstrated of new venture financing sources and opportunities.	Give at least two examples of different funding or financing sources and / or opportunities that you would consider when starting a new business. (2)	2		
3.2. An understanding is demonstrated of the principles of micro and macroeconomics.	Explain what the difference is between micro- and macroeconomics. (1) Give an example of how macroeconomics may influence a business in the citrus sector. (1) Give an example of how microeconomic may influence a business in the citrus sector. (1)	3		
3.3. Potential threats and opportunities within the economic environment are identified for future business decision making.	It is important for an entrepreneur to identify threats and opportunities in the economic environment in order to make sound business decisions. Give examples of at least two threats to a new business in the citrus sector in the current economic environment. (2) Give examples of at least two opportunities for a new business in the citrus sector in the current economic environment. (2)	4		
3.4. An understanding is demonstrated of business competitiveness. Range: Business competitiveness includes but is not limited to factors such as inflation, exchange rates, interest rates, economic indicators and competition.	Compare a new primary citrus grower business unit in South Africa vs a similar unit in Brazil. In your opinion, which is more favourable in its competitive factors? (1) Discuss the following competitiveness factors to motivate your answer: ✓ Inflation (1)	6		

ELO	Key point in presentation (with allocated value)	Total value available	Actual value scored	Feedback
	✓ Exchange rates (1) ✓ Interest rates (1) ✓ Economic indicators (1) ✓ Competition (1)			
The candidate should score at least 8 out of a possible 16 points to be declared competent in this ELO		**16**		
4. Manage a new venture by applying business principles and techniques.	Prepare and present a simple business plan for a new venture of your choice in the citrus sector. (5) Use the template below as a guideline for the business plan content.	5		
4.1. A business plan for a new venture is developed using strategic planning principles and techniques.	Explain what strategic planning principles and techniques you used to guide you through the business planning process. (2)	2		
4.2. Guidelines for the implementation and monitoring of the strategic action plan are formulated in terms of milestones and timeframes.	Present an example of an activity that may require you to draft a strategic action plan. (1) Now draft and present an actual strategic action plan document. (3) Indicate clearly on the plan when and how you intend to monitor the implementation actions. (2) Present the monitoring milestones and timeframes. (2)	8		
4.3. Financial management planning principles and techniques are applied in order to manage the business in an efficient and effective manner.	Give two different examples of financial planning principles and / or techniques you intend to use to manage your business. (4)	4		

ELO	**Key point in presentation (with allocated value)**	**Total value available**	**Actual value scored**	**Feedback**
4.4. Production and / or operations management is applied in a chosen business opportunity.	Explain what you understand the term production and / or operations management to mean in the context of your chosen business in the citrus sector. (2)	2		
4.5. Sound human resources management techniques are applied in order to set up a productive and motivated workforce for a business.	Give two examples of human resources management techniques that you intend to use in your business. (2) Explain what the value of sound human resources techniques have in terms of staff productivity and motivation. (1) Give an example of a specific human resources tool or technique you can use to enhance staff motivation. (1)	4		
4.6. Administrative principles and procedures are applied for sound administration and recordkeeping.	Give an overview of the administrative principles and procedures you intend to apply to your business. (2) Explain what the value of good administration and recordkeeping is in terms of business success. (1)	3		
The candidate should score at least 14 out of a possible 28 points to be declared competent in this ELO		**28**		
5. Demonstrate an understanding of the role of leadership and management	Present how you view your own role as a learner and / or manager of your chosen business in the citrus sector. (What functions do you think you will fulfil and what is the scope of your leadership role?). (2)	2		
5.1. Knowledge is demonstrated of how management and leadership principles are applied to improve business effectiveness and efficiency.	Give two examples of leadership principles that can be applied to improve business effectiveness and efficiency. (2) In your opinion, why is it important to study different leadership theories and principles and choose when to apply which in different business situations? (1)	3		

ELO	**Key point in presentation (with allocated value)**	**Total value available**	**Actual value scored**	**Feedback**
5.2. Knowledge is demonstrated of the differences between leadership and management in terms of managing a business.	Explain the difference between leadership and management. (1) Give an example of a situation in your business where leadership is required. (1) Give an example of a situation in your business where management is required. (1)	3		
5.3. Knowledge is demonstrated of leadership and management styles in relation to their impact on business performance.	Compare two different leadership and / or management styles that can be applied to business. Illustrate the different potential impacts on the business with examples. (4)	4		
5.4. Leadership and management principles and techniques are applied in order to enhance business performance. The entrepreneur combines 'land, labour and capital' with a particular idea or skill in order to run his business and market new or particular goods or services.	Present an example of how you as entrepreneur intend to combine 'land, labour and capital' with a specific leadership or management principle and / or technique to run your citrus sector business efficiently. (4)	4		
The candidate should score at least 8 out of a possible 16 points to be declared competent in this ELO		**16**		

Feedback on Assessment

Note that a separate hard-copy per learner should be printed and used to record the feedback.

Learner First Name and Surname:	
Assessor First Name and Surname:	
Date of Portfolio Assessment:	
Date on which Feedback is Given:	

Competence judgement after 1st attempt:

After the assessment of evidence the following competence judgements are made:

Unit Standard	**ELO**	**Exit Level Outcome**	**Competent or Not Yet Competent?**	**Feedback and Comments**
66249	ELO1	Demonstrate an ability to identify and create a new venture.		
66249	ELO101	An understanding is demonstrated of the importance of a paradigm shift from a job-seeking attitude to a business opportunity seeking attitude.		
66249	ELO102	Business opportunities are identified and evaluated in terms of its potential viability.		
66249	ELO103	Problem-solving techniques and principles are applied within a business start-up and operation context.		
66249	ELO2	Demonstrate knowledge of interpersonal skills required in a business environment.		
66249	ELO201	An understanding is demonstrated of the concept of group dynamics.		
66249	ELO202	An understanding is demonstrated of the characteristics of effective teamwork.		
66249	ELO203	An understanding is demonstrated of various networking principles and techniques.		
66249	ELO204	Potential personal limitations, abilities and expectations are identified for self-developmental purposes.		
66249	ELO3	Demonstrate an understanding of basic economics within a market economy.		
66249	ELO301	An understanding is demonstrated of new venture financing sources and opportunities.		
66249	ELO302	An understanding is demonstrated of the principles of micro and macroeconomics.		
66249	ELO303	Potential threats and opportunities within the economic environment are identified for future business decision making.		
66249	ELO304	An understanding is demonstrated of business competitiveness.		
66249	ELO4	Manage a new venture by applying business principles and techniques.		
66249	ELO401	A business plan for a new venture is developed using strategic planning principles and techniques.		
66249	ELO402	Guidelines for the implementation and monitoring the strategic action plan are formulated in terms of milestones and timeframes.		
66249	ELO403	Financial management planning principles and techniques are applied in order manage the business in an efficient and effective manner.		

66249	ELO404	Production and / or operations management is applied in a chosen business opportunity.		
66249	ELO405	Sound human resources management techniques are applied in order to set up a productive and motivated workforce for a business.		
66249	ELO406	Administrative principles and procedures are applied for sound administration and recordkeeping.		
66249	ELO5	Demonstrate an understanding of the role of leadership and management.		
66249	ELO501	Knowledge is demonstrated of how management and leadership principles are applied to improve business effectiveness and efficiency.		
66249	ELO502	Knowledge is demonstrated of the differences between leadership and management in terms of managing a business.		
66249	ELO503	Knowledge is demonstrated of leadership and management styles in relation to their impact on business performance.		
66249	ELO504	Leadership and management principles and techniques are applied in order to enhance business performance.		

Remedial action agreed after 1st attempt:	

Competence judgement after 2nd attempt:

After the re-assessment of evidence the following competence judgements are made:

Unit Standard	ELO	Exit Level Outcome	Competent or Not Yet Competent?	Feedback and Comments
66249	ELO1	Demonstrate an ability to identify and create a new venture.		
66249	ELO101	An understanding is demonstrated of the importance of a paradigm shift from a job-seeking attitude to a business opportunity seeking attitude.		
66249	ELO102	Business opportunities are identified and evaluated in terms of its potential viability.		
66249	ELO103	Problem-solving techniques and principles are applied within a business start-up and operation context.		
66249	ELO2	Demonstrate knowledge of interpersonal skills required in a business environment.		
66249	ELO201	An understanding is demonstrated of the concept of group dynamics.		
66249	ELO202	An understanding is demonstrated of the characteristics of effective teamwork.		
66249	ELO203	An understanding is demonstrated of various networking principles and techniques.		
66249	ELO204	Potential personal limitations, abilities and expectations are identified for self-developmental purposes.		
66249	ELO3	Demonstrate an understanding of basic economics within a market economy.		
66249	ELO301	An understanding is demonstrated of new venture financing sources and opportunities.		
66249	ELO302	An understanding is demonstrated of the principles of micro and macroeconomics.		
66249	ELO303	Potential threats and opportunities within the economic environment are identified for future business decision making.		
66249	ELO304	An understanding is demonstrated of business competitiveness.		
66249	ELO4	Manage a new venture by applying business principles and techniques.		
66249	ELO401	A business plan for a new venture is developed using strategic planning principles and techniques.		
66249	ELO402	Guidelines for the implementation and monitoring the strategic action plan are formulated in terms of milestones and timeframes.		
66249	ELO403	Financial management planning principles and techniques are applied in order manage the business in an efficient and effective manner.		
66249	ELO404	Production and / or operations management is applied in a chosen business opportunity.		
66249	ELO405	Sound human resources management techniques are applied in order to set up a productive and motivated workforce for a business.		
66249	ELO406	Administrative principles and procedures are applied for sound administration and recordkeeping.		
66249	ELO5	Demonstrate an understanding of the role of leadership and management.		
66249	ELO501	Knowledge is demonstrated of how management and leadership principles are applied to improve business effectiveness and efficiency.		
66249	ELO502	Knowledge is demonstrated of the differences between leadership and management in terms of managing a business.		

66249	ELO503	Knowledge is demonstrated of leadership and management styles in relation to their impact on business performance.		
66249	ELO504	Leadership and management principles and techniques are applied in order to enhance business performance.		

Overall competence judgement and / or recommendations (tick as necessary):	☐ Competent ☐ Not yet competent ☐ Not yet assessed ☐ Re-assessment by different facilitator ☐ Upload results
Date:	
Declaration by Learner:	I hereby confirm that: ☐ I received the assessment feedback and remedial action (if relevant); ☐ I have received and agree with the assessment decision; or ☐ I know I have the right to appeal the assessment decision.
Date:	
Place:	
Signature of Learner:	
Signature of Assessor:	

Step 7: Re-Assessment Procedures

If the learner is not competent after the first assessment, the assessor must plan with the learner and commence the re-assessment process.

Note that only outcomes on which the learner was found not yet competent must be re-assessed. Assessment tools must be adapted at the discretion of the assessor. Best practice is not to present the exact same format and questions if possible. Use your expertise and judgement to ensure that the method of re-assessment remains integrated and relevant to the expected outcomes.

Allowing the learner one opportunity for re-assessment is considered fair assessment practice. If the learner is still found not competent after one re-assessment, the learning process must be repeated at the learner's expense.

Step 8: Documentation and Administration

The documentation described below must be completed in this step. These documents are provided on the following pages. Print copies, if necessary, for each learner that is being assessed and attach summaries to your assessor report.

All the documents or copies thereof, as prescribed, must be kept on file as part of the learner portfolio of evidence. The learner must be requested to sign-off all reports and documents before they are placed in the portfolio of evidence. Please record the dates on which the documents are completed, in the spaces provided.

Learner's portfolio of evidence must be readily available for moderation and verification by the appropriate practitioners, until after the verification process is complete. The portfolio of evidence may then be kept or returned to the learner according to the service provider's policy. Please remember that statements of results should be kept on file for a minimum of five years after the completion of the verifications process.

Learner and Assessor Information Forms

These forms must be completed for each individual learner and placed in the learner's portfolio of evidence.

Learner Information Form				
Unit Standards:	FISA			
Programme Date(s):				
Assessment Date(s):				
Surname:				
First Name:				
Learner ID / SETA Reg Number:				
Job / Role Title:				
Home Language:				
Gender:	Male		Female	
Race:	African	Coloured	Indian / Asian	White
Employment:	Permanent		Non-permanent	
Disabled:	Yes		No	
Date of Birth:				
ID Number:				
Contact Telephone Numbers:				
Email Address:				
Postal Address:				

Assessor Information Form				
Unit Standards:	FISA			
Programme Date(s):				
Surname:				
First Name:				
Company Name:				
Job / Role Title:				
Home Language:				
Gender:	Male		Female	
Race:	African	Coloured	Indian / Asian	White
Employment:	Permanent		Non-permanent	
Disabled:	Yes		No	
Date of Birth:				
ID Number:				
Contact Telephone Numbers:				
Email Address:				
Postal Address:				

Assessor Report and Evidence Collection Summary

This report should include an overview of the assessment process that was followed as well as the evidence collection matrix provided. Please attach any evidence of abnormal assessment activities including:

- Disputed assessments
- Special needs assessments
- Repeated re-assessments

Please comment on learner suggestions and feedback on the assessment. Add your recommendations for future improvements to the process.

Learner Assessment Re-actionnaire

A pro forma for the learner assessment re-actionnaire follows. Ask each learner to complete this form and sign it. Attach a summary of the learner feedback to your assessor report.

Learner Assessment Re-actionnaire			
How did the assessor encourage you to be involved in the assessment process?			
Did the assessor take your special needs into account? If so, how?			
Did the assessor agree on the assessment procedures with you?			
Was feedback relevant to your needs?			
Were you always aware of the outcome of the assessment?			
Did the assessor help you to explore ways of becoming competent whenever you were judged "Not Yet Competent"?			
Did the assessor allow you to ask questions?			
Did you always agree with assessment decisions?			
Was all appropriate documentation completed and signed and did you receive copies?			
Did the assessor assist or prevent you in any way when gathering evidence so as to obscure its authenticity?			
All the evidence submitted in my name is my authentic work, which was not acquired by any unethical means.			
Learner's Signature:		Date:	
Assessor's Signature:		Date:	
Moderator's Signature:		Date:	

Assessment Appeal Form

Any learner has the right of appeal against any "Not Yet Competent" decision by the assessor. If the learner wishes to appeal, please assist him / her to complete the form below.

Assessment Appeal Form			
I hereby appeal against the outcome of my assessment.			
Date:			
Learner's Name:			
Assessors Name:			
Organisation:			
Assessment Details: (Criteria, role, standards used)			
Issue to be Reviewed:			
Learner's Signature:		Date:	
Assessor's Signature:		Date:	