



# PLANNER & TRACKER

## Economic and Management Sciences Grade 9

- *Progress tracker*
- *Intervention strategies*
- *Photocopiable worksheets*
- *Assessment support*
- *Key vocabulary*



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Note to Teacher: Additional content may have been added to 2023 Annual Teaching Plan after the publication of the Learner's Book and Teacher's Guide.

## Worksheets and Resources 12

The formal assessment worksheets in this book are taken from the *Oxford Successful Economic and Management Sciences Grade 8 Learner's Book* and *Teacher's Guide*. The answers to the worksheets can be found in the *Oxford Successful Economic and Management Sciences Grade 8 Teacher's Guide*. The page references for the answers in the Teacher's Guide are given below.

### Formal assessments

Term 1	TG page 42
Term 2	TG page 78
Term 3	TG page 89

### Revision of previous work from previous term

Term 2 (Revision of Term 1)	TG page 155
Term 3 (Revision of Term 2)	TG page 161
Term 4 (Revision of Term 3)	TG page 164

### End of term consolidation

Term 1 (Exemplar controlled test)	TG page 174
Term 2 (Exemplar mid-year examination)	TG page 186
Term 3 (Exemplar controlled test)	TG page 176
Term 4 (Revision)	TG page 173
Term 4 (Exemplar end-of-year examination)	TG page 189

Additional exam papers are available in the Teacher's Guide for your use:

Term 1 controlled test	TG page 178
Mid-year examination	TG page 193
Term 3 controlled test	TG page 182
End of year examination	TG page 199

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# TERM 1

## Progress tracker for Oxford Successful Social Sciences Grade 9 Economic Management Sciences

Week	Contents and concepts (based on 2023/24 ATPs)	Worksheet name and page number	Learner's Book chapter and page reference	Planned time allocation	Date of completion	Teacher reflection
1	<p><b>The Economy: Economic systems</b></p> <ul style="list-style-type: none"> <li>The three major economic systems: Planned economy, market economy, a mixed economy, origin</li> <li>Advantages, disadvantages and characteristics of each economic system</li> <li>Global Economy</li> </ul>		Module 8 Unit 2 LB: pp. 22	2 hours		
2-3	<p><b>The economy: Circular flow</b></p> <ul style="list-style-type: none"> <li>Factors of production</li> <li>Types of markets</li> <li>Participants in the circular flow of a closed economy</li> <li>The flow of goods and services, money, and factors of production in the circular flow of a closed economy</li> <li>Using a flow diagram</li> </ul>		Module 8 Unit 3 LB: pp. 47	4 hours		
4-7	<p><b>Financial literacy: CRJ and CPJ</b></p> <ul style="list-style-type: none"> <li>Effect of cash transactions on the accounting equation: Grade 8 revision</li> <li>Cash transactions of a trading business</li> </ul>		LB: pp. 12	8 hours		

	<ul style="list-style-type: none"> <li>Complete transactions in the Cash Receipt Journal (CRJ)</li> <li>Complete transactions in the Cash Payment Journal (CPJ)</li> </ul>						
8-9	<p><b>Financial literacy: General ledger</b></p> <ul style="list-style-type: none"> <li>Classification of accounts</li> <li>Post the transaction from Cash Receipt Journal (CRJ) to the general ledger</li> <li>Classification of accounts</li> <li>Post the transaction from Cash Payments Journal (CPJ) to the general ledger</li> </ul>			LB: pp. 31	4 hours		
10	<p><b>Financial literacy: Trial balance</b></p> <ul style="list-style-type: none"> <li>Prepare a trial balance of a trading business</li> </ul>	<p><b>Term 1 Worksheet:</b> Prepare a trial balance TRB pp.12</p>		LB: pp. 31			
11	<p><b>Revision and Assessment</b></p>	<p><b>Term 1 Exemplar:</b> Control test TRB pp.13</p>	<p>Exemplar controlled test LB pp. 55-56;</p>		2 hours		

## TERM 2

### Progress tracker for Oxford Successful Social Sciences Grade 9 Economic Management Sciences

Week	Contents and concepts (based on 2023/24 ATPs)	Worksheet name and page number	Learner's Book chapter and page reference	Planned time allocation	Date of completion	Teacher reflection
1-2	<p><b>The Economy: Price theory</b></p> <ul style="list-style-type: none"> <li>• Demand and supply</li> <li>• Law of demand</li> <li>• Demand schedule and Graphical illustration of demand curve</li> <li>• Law of supply</li> <li>• Supply schedule</li> <li>• Graphical illustration of the supply curve</li> <li>• Graphical illustration of the demand and supply curve</li> <li>• Equilibrium price and quantity</li> </ul>	<p><b>Term 2 Worksheet:</b> Data Response TRB: pp. 24</p>	LB: pp. 76	4 hours		
3	<p><b>Entrepreneurship: Sectors of the economy</b></p> <ul style="list-style-type: none"> <li>• The primary, secondary, and tertiary sectors</li> <li>• Types of businesses found in each of the three sectors</li> <li>• Interrelationships between the three sectors</li> <li>• Sustainable use of resources in the three sectors</li> <li>• The role of the three sectors in the economy</li> <li>• Types of skills required in each of the three sectors</li> </ul>		LB: pp. 88	4 hours		

4-7	<p><b>Financial literacy: Credit transactions</b></p> <ul style="list-style-type: none"> <li>• Credit sales: Debtors</li> <li>• National Credit Act (NCA)</li> <li>• Accounting cycle</li> <li>• Effect of transactions on the accounting equation</li> </ul> <p>Recording transactions in the debtor's journal and posting to the debtor's ledger and general Ledger</p> <ul style="list-style-type: none"> <li>• Recording transactions in the debtor's journal and posting to the debtor's ledger and general ledger</li> <li>• Recording transactions in the debtor's journal and posting to the debtor's ledger and general ledger</li> </ul>		LB: pp. 62	8 hours		
8-9	<b>Revision</b>		LB: pp. 31	2 hours		
10 -11	<b>Revision and Assessment</b>	<b>Term 2 Exemplar:</b> Mid-year examination TRB pp.26	Exemplar controlled test LB pp. 95-97	2 hours		

**TERM 3****Progress tracker for Oxford Successful Social Sciences Grade 9  
Economic Management Sciences**

Week	Contents and concepts (based on 2023/24 ATPs)	Worksheet name and page number	Learner's Book chapter and page reference	Planned time allocation	Date of completion	Teacher reflection
1-2	<p><b>Entrepreneurship: Functions of the business</b></p> <ul style="list-style-type: none"> <li>The different kinds of business functions, administration, purchasing, marketing, financing, public relations, human resources, production, general management, risk management</li> <li>Role and importance of business functions</li> </ul>		LB: pp. 129	4 hours		
3-4	<p><b>Entrepreneurship: Business plan</b></p> <ul style="list-style-type: none"> <li>Concepts, components and form of a business plan</li> <li>SWOT analysis description of the product or service offered by the business, production plan, marketing plan, management plan and financial plan</li> </ul>		LB: pp. 171	4 hours		
5-6	<p><b>Financial literacy: Debtors</b></p> <ul style="list-style-type: none"> <li>Consolidation of activities</li> <li>Recording of cash and credit transactions of a sole trader in the subsidiary journals</li> <li>Consolidation of activities</li> </ul>		LB: pp. 111	8 hours		

7-10	<p><b>Financial literacy: Creditors</b></p> <ul style="list-style-type: none"> <li>• Credit purchases: Accounting cycle</li> <li>• Effect of transactions on the accounting equation</li> <li>• Creditors journal, posting to general ledger and creditors ledger</li> <li>• Recording of payments to the Cash Payment Journal (CPJ), posting to the general ledger and creditors ledger</li> <li>• Posting to general ledger and creditors ledger</li> </ul>		LB: pp. 31	8 hours		
11	<b>Revision</b>	<b>Term 3 Exemplar:</b> Control test TRB: pp.39	Exemplar controlled test LB pp. 150	2 hours		

**TERM 4****Progress tracker for Oxford Successful Social Sciences Grade 9  
Economic Management Sciences**

Week	Contents and concepts (based on 2023/24 ATPs)	Worksheet name and page number	Learner's Book chapter and page reference	Planned time allocation	Date of completion	Teacher reflection
1-2	<p><b>The economy: Trade unions</b></p> <ul style="list-style-type: none"> <li>• Concept of trade unions</li> <li>• Effect of trade unions on businesses and contribute to sustainable growth</li> </ul>	<p><b>Term 3 Project:</b> Research a trade union <b>TRB: pp.38</b></p>	LB: pp.	4 hours		
3-5	<p><b>Financial literacy: Cash and credit</b></p> <ul style="list-style-type: none"> <li>• Effect of cash and credit transactions on the accounting equation</li> <li>• Cash journals: CRJ, CPJ</li> <li>• Credit journals: DJ, CJ</li> <li>• Posting to the general ledger, debtors and creditors ledger and trial balance</li> </ul>		LB: pp. 156	6 hours		
6	<p><b>Revision</b></p> <ul style="list-style-type: none"> <li>• Consolidation of activities</li> <li>• Recording of cash and credit transactions of a sole trader in the subsidiary journals</li> <li>• Consolidation of activities</li> </ul>		LB: pp. 179	8 hours		
7-10	<b>Year end examination</b>	Revision of Term 3 work TRB: pp. 43	LB: pp. 31	8 hours		





# Worksheet: Term 1 Exemplar controlled test

Name: \_\_\_\_\_ Class: \_\_\_\_\_

## The economy

### Question 1

1.1 Discuss the diagram on page 55 of the Learner’s Book and explain why you think the mixed market system has been placed at the top of the triangle.

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(10)

1.2 Describe the global economy and give one example.

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(8)

## Question 2

Global Carpets Ltd has a large factory in the Greshan Park industrial area. They manufacture carpets for the local and international market. The majority of their workforce live in the Greshan Park Village Community. Use the diagram on page 55 of the Learner's Book to answer the following questions:

- 2.1 List the participants in the circular flow of a closed economy. Suggest one example for each.

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(8)

- 2.2 Discuss the flow of goods to both the households and Global Carpet Ltd.

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(6)

- 2.3 Explain how the factors of production affect Global Carpet Ltd and the households in Greshan Park Village community.

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(8)

2.4 Explain what a factor market is and explain how it affects the flow of money in a closed economy. Give examples.

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(10)

[50]

**Financial literacy**

Greshan Park Trading Store sells a variety of products including groceries, clothing and homeware.

Totals of Journals on 30 June 2013.

**Cash Receipts Journal for Greshan Park Trading Store for June 2013**

Analysis of bank	Bank	Sales	Cost of sales	Sundry Accounts
0	R	47 355		19 560

**Cash Payments Journal for Greshan Park Trading Store for June 2013**

Bank	Trading stock	Wages	Fuel	Sundry Accounts
69 735	38 625	15 960	1 560	

Balances on 1 June 2013

Capital, R130 000; Trading Stock, R23 590; Sales, R138 355; Cost of sales, R110 684; Wages, R43 790

1 Calculate the cost of sales for the Cash Receipts Journal.

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(12)

2 Calculate the bank amount in the Cash Receipts Journal.

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(4)

3 Calculate the total for sundry accounts in the Cash Payments Journal.

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(6)

4 Post to the following General Ledger accounts: Bank, Trading stock, Sales and Cost of sales. (*Use the General Ledger template on page 61.*)

(20)

5 How would drawing up a Trial Balance assist the owner of Greshan Park Trading Store? Give reasons for your answer.

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(8)

**[50]**

**Total: 100 marks**

## Worksheet: Term 2 Revision of Term 1's work

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### Financial literacy: Cash Receipts Journal and Cash Payments

#### Journal of a trading business

1 Match the description and examples in column B with the terms in column A.

1.1	Accounting equation	A	The difference between cost price and selling price	
1.2	Asset	B	The price the buyer pays	
1.3	Cost price	C	Assets, liabilities, owners equity	
1.4	Liability	D	Bank overdraft	
1.5	Mark-up	E	Bank	
1.6	Owners equity	F	Assets, liabilities, income and expenses	
1.7	Profit	G	Capital, drawings, income, expenses	
1.8	Selling price	H	The cost of the product less trade discount	
1.9	Sole trader	I	Money and assets used to start a business	
1.10	Trial balance	J	The difference between income and expenses	

1.1 ..... 1.2 ..... 1.3 ..... 1.4 ..... 1.5 .....

1.6 ..... 1.7 ..... 1.8 ..... 1.9 ..... 1.10 ..... (20)

2 Insert the missing word. Note, some words are used more than once.

assets, balanced, bank, bank account, capital, cash payments journal, cash register roll, cheque counterfoil, cheque, cost of sales, drawings, duplicate receipt, expenses, general ledger, income, journals, liabilities, sales, trading stock, transaction, trial balance, twice

A sole trader is an entrepreneur who starts a business using

(a) ..... The first (b)..... is to open

a (c) ..... The bank issued the business with a

(d) ..... book. The cheques are used to purchase  
(e) ..... and pay (f) ..... The business will  
receive income from (g) ..... When goods are sold for  
cash, the (h) ..... is the source  
document used. Cash sales affect four general ledger accounts  
(i) ..... and (j)..... with the selling price and  
(k) ..... and (l) .....  
with the cost price. The business uses the (m) .....  
.....to record any cash payments in the  
(n) ..... . At the end of the  
month, the (o) ..... are totalled and posted to the  
(p)..... The balance sheet section  
of the general ledger is (q) ..... but the nominal  
section is totalled. The sole trader will use all the balances and totals  
in the (r) ..... to draw up the  
(s) ..... This document is used to  
check that every transactions has been recorded (t)..... .  
This is called the (u)..... principle. Every  
transaction affects the accounting equation. The accounting equation  
is (v)..... plus (w) ..... equals  
Owner's Equity. Owners' equity is made up of (x)..... ,  
(y) ..... , profit or loss. The profit or loss is calculated  
using the (z) ..... and (aa) ..... . (54)

- 3 Limpopo Traders uses a mark-up of 60% on all products. Jonny's wife has been taken to hospital and Sarah, his daughter, has tried to do the cash journals for her Dad. However, she does not have any bookkeeping or accounting training.

Balances as at 1 April 2013:

Capital, R230; Bank (Cr) R19 045; Vehicle, R125 600; Equipment, R195 000; Loan from Rabobank, R80 000; Trading stock 46 200; Sales, R523 000; Cost of sales, R?; Stationery, R3 600, Fuel, R4 520; Repairs, R2 650; Consumable stores, R4 500; Water & electricity, R2 300; Telephone, R5 600; Wages, R123 200; Rent, R12 000.

Look at the Cash Receipts Journal of Limpopo Traders for April 2013 and the Cash Payments Journal of Limpopo Traders for April 2013 on page 59 of the

Learner's Book and then answer the following questions.

- 3.1 Draw up a Trial Balance on 1 April 2013. (*Use the Trial Balance template on page 60.*) (18)
- 3.2 Rewrite the cash journals correctly. (*Use the Cash Journals template on page 62.*) (62)
- 3.3 Post to the General Ledger. (*Use the General Ledger template on page 61.*) (47)
- 3.4 Draw up a Trial Balance on 1 May 2013. (*Use the Trial Balance template on page 60.*) (18)
- 3.5 Analyse all the transactions on the following dates: April 9, 21, 30.


(20)

- 3.6 Profit is calculated by subtracting expenses from income. Calculate the profit or loss on 30 April and comment on this result. Suggest ways to improve the profit of the business.


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(20)  
[259]

**The economy**

The economy deals with the different economic systems and the circular flow of a closed economy.

**Question 1**

Four options are provided as possible answers to the following questions. Choose the answer and write only the letter A–D in the space provided.

1.1	The four factors of production are ____ .	(2)
	A Capital, sole trader, assets/possessions, employees	
	B Natural resources, sole trader, money, managers	
	C Capital, natural resources, labour, entrepreneur	
	D R110 000 capital, R96 000 trading stock, R56 000 wages and salaries, R20 000 profit	
1.2	In a communist country, the government makes all the decisions about the type of work, number of factories and businesses, where workers will live and how much they get paid. This is an example of a ____ economy.	(2)
	A planned	
	B market	
	C mixed	
	D capitalist	
1.3	The United States of America has few labour laws and it is called the land of opportunity. Their economy is regarded as a ____ economy.	(2)
	A planned	
	B market	
	C mixed	
	D communist	



2.3 Explain what is meant by an economic problem.

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(4)

2.4 Karl Marx wrote a book in which he said that workers were exploited by the capitalist economic system.

2.4.1 Do you agree with this statement? Give reasons for your answer.

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(8)

2.4.2 What does Karl Marx mean when he says a 'capitalist' system?

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(4)

2.4.3 He developed the communist philosophy. Explain the type of economic system used in a communist country.

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(10)

2.4.4 The greatest communist country, Russia, eventually disbanded their economic system and many states withdrew from the Russian Federation. This system did not seem to have sustainability in the long term. Give reasons why you think their economic system failed.

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(6)

2.5 If you were the president of a country, which economic system would you implement? Give reasons for your answer.

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(12)  
[72]

**Total: 331 marks**



3 There was a change in the demand for milk and it is now as follows:

Price	Quantity demanded
R2,00	6 500
R3,00	6 000
R4,00	5 500
R5,00	5 000
R6,00	4 500
R7,00	4 000
R8,00	3 500

Plot these new values in on the same axes as your other graph, showing the effect it has. (11)

4 What is the new equilibrium price and quantity?

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..... (4)

5 Supply three reasons why this change in demand would occur.

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..... (6)

**Total: 50 marks**

## Worksheet: Exemplar mid-year examination

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### SECTION A

#### Question 1: True or false

State whether the following statements are true or false. Tick the correct answer.

		True	False	
1.1	The owner of a business can only take money as drawings.			(2)
1.2	The tertiary sector is responsible for transporting goods to customers.			(2)
1.3	People who have bought goods from the business during April and only pay in June are known as debtors.			(2)
				[6]

#### Question 2: Fill in the missing word

Fill in the missing word/words which will complete the statements below.

- 2.1 Source document used for credit sales is the ..... (2)
- 2.2 The point where demand meets supply is known as ..... (2)
- 2.3 Cost price of goods sold is shown in the ..... account in the General Ledger. (2)
- 2.4 An insurance company is an example of the ..... sector. (2)
- [8]

#### Question 3: Multiple choice

Choose the most correct option for each statement from those provided. Write only the letter in the answer space.

- 3.1 The type of businesses in the secondary sector are ..... (2)
- A** Service      **B** Manufacturing      **C** Retail      **D** Wholesale

- 3.2 Which of the following is not a characteristic of a planned economy? ..... (2)
- A Government sets prices of goods and services
  - B Government and consumers decide on supply of products in the market
  - C Consumer demand is controlled
  - D Government decides on the production of goods in the market
- 3.3 The National Credit Act does not ..... (2)
- A Protect consumers against unfair credit transactions
  - B Provide consumers with information about borrowing money
  - C Stop people from going into debt
  - D Ensure consumers buy good quality products at reasonable prices
- 3.4 Clover Milk and Cremora Coffee Creamer are known as ..... (2)
- A Complementary products
  - B Consumer products
  - C Substitute products
  - D Retail products
- 3.5 Which of the following is not one of the factors of production? ..... (2)
- A Capital                      B Land                      C Enterprise                      D Labour

[10]

[24]

## SECTION B: The economy

### Question 4

Olivia and Angela sell three variations of brownies: chocolate and pecan nut brownies, triple chocolate brownies, and white chocolate and fudge brownies. The brownies are sold individually, as packs of 3, or as mixed packs of 3. The following information was collected: the table shows how the demand for their products varied at different price levels:

Price (triple brownie packs)	Quantity demanded
R 10,00	150
R 15,00	120
R 20,00	110
R 25,00	100
R 30,00	80
R 40,00	50

4.1 Construct a demand curve to display the information in the table.


(10)

4.2 Identify and explain TWO factors, besides prices, which could cause the demand for any product to increase.

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(8)

**Question 5**

The United States of America has been classified as a mixed economy. It freely trades with countries around the world and largely influences the global market.

5.1 Define a mixed economy.

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(2)

5.2 Name TWO characteristics of a mixed economy.

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(2)

5.3 Name TWO other economies the USA could have been classified as.

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----- (2)  
----- [24]

### SECTION C: Financial literacy

#### Question 6

Record the transactions of Justine Stores for August 2013 into the Cash Receipts Journal. (*Use the Cash Receipts Journal template on page 62.*) (20)

#### Transactions for August 2013

- 1 Sold old equipment to Debbie, R980. Issued her receipt 167.
- 1 Sold goods to M. Marks for R1 200 (cost price R850).
- 10 Cashed cheque 216 to pay the weekly wages, R1 800.
- 12 Received R2 260 from Helen. This was to settle her account with us from money she owed from the previous month.
- 19 Sold merchandise to K. Smooch, R1 500 (mark-up of 50% on cost).
- 20 Issued a cheque to Telkom for R1 350.
- 24 Bought stock from Richy Rich for R3 260.
- 27 Cash sales for the day amounted to R3 600 (mark-up of 25% on cost).

#### Question 7

Springbok Sport Traders sell sport equipment and accessories. Use the information given below and on page 97 of the Learner's Book to complete the accounts in the General Ledger of Springbok Sport Traders for September 2014. (*Use the General Ledger template on page 61.*)

- |                   |     |
|-------------------|-----|
| 7.1 Bank          | (6) |
| 7.2 Trading stock | (6) |
| 7.3 Sales         | (2) |
| 7.4 Stationery    | (2) |

#### Information

The following balances appeared in the General Ledger of Springbok Sport Traders on 1 September:

- Bank: R8 960
- Trading Stock: R7 780
- Sales: R10 002
- Stationery: R1 880

[36]

**SECTION D: Entrepreneurship**

**Question 8**

8.1 Kellogg’s Corn Flakes are distributed throughout the country. Using a diagram, show all the sectors Kellogg’s Corn Flakes would have passed through to finally be in the consumers hands. Your diagram must name the sector, explain what happens in that sector and how the cereal moves between the sectors.



(10)

8.2 What skills are required in the secondary sector?

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(6)

**[16]**

**Total: 100 marks**

## Worksheet: Term 3 Revision of Term 2's work

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### Financial literacy

In Term 2 you learnt about credit sales, debtors, debtors allowances and the National Credit Act.

- 1 Normental Shoe Supplies is a business that sells imported and local shoes. Linny, the owner, has decided to offer credit to her customers to increase her sales. She uses a mark-up of 30% on cost.

#### Transactions for March 2013

- 1 Sold goods for cash, R7 436; Received Cash from Mall Shoe CC, R19 650 and Central Wholesalers, R32 590.
- 2 Paid Blistering Shoes R21 300 for stock; sold Mall Shoes CC R12 740 on account.
- 3 Cashed cheque to pay wages, R6 500 and sold Central Wholesalers R19 305 on account.
- 7 Sold goods for cash, R17 303; cashed cheque to pay fuel, R1 560 and paid PC Glass for repairs to vehicle windscreen, R950. Central Wholesalers returned R6 941 stock that was damaged.
- 10 Received R12 930 from Ridicool Shoes.
- 14 Cash sales, R1 157.
- 15 Paid Shoe Emporium R31 650 cash for trading stock; Zondi Stationers R1 690 for stationery and Mzimang Traders R3 560 for consumable stores. Mall Shoes notified Linny that R539 trade discount had been omitted from their invoice on 2 March.
- 17 Cashed cheque to pay wages, R6 500.
- 19 Paid Choprite R960 for cleaning supplies; and sold R8 047 stock to Ridicool on account and R8 008 to Banglor Boutique on A/C.
- 21 Cash sales, R7 488 and issued receipt to Banglor Boutique, R6 980.
- 22 Ridicool shoes returned the pack of gold shoes that were poorly made, R649.
- 25 Cashed cheque to pay wages, R6 500. Linny cashed a cheque for personal reasons, R960.
- 29 Sent letter to Mall Shoe CC to remind them to pay their February account, R16 500. Paid Blistering Shoes R24 560 off our account.
- 30 Paid Rental Properties R6 950 for rent.  
Received the bank statement showing R126 bank charges.



1.4 Discuss why goods returned by customers is not subtracted from sales.

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(6)

1.5 Draw up the following journals: (supply your own source document numbers)

1.5.1 Cash Receipts Journal: analysis, bank, sales, cost of sales, sundry accounts. (*Use the template on page 62.*)

1.5.2 Cash Payments Journal: bank, trading stock, wages, consumable stores and sundry accounts. (*Use the template on page 62.*)

1.5.3 Debtors and Debtors Control Journals.

(88)







[118]

# Entrepreneurship

## Question 1

Linny owns Normental Shoe Supplies. She purchases shoes from overseas and from local manufacturers. She has decided to add different kinds of bags to her range. She has sourced a small manufacturing business that makes bags called Bag Ladies. The owner would like to take in a partner and Linny is looking at this option.

1.1 List 3 sectors in the economy.

(3)

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1.2 Identify which sector Normental Shoe Supplies belongs to and give reasons for your answer.

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(8)

1.3 Which sector would the Bag Ladies fall under? Describe the characteristics of this sector.

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(10)





## Question 2

Four options are provided as possible answers to the following questions. Write only the letter (A-D) in the space provided.

2.1	A commercial fisherman belongs to the ____ sector.		(2)
	A	Primary	
	B	Secondary	
	C	Tertiary	
	D	None of the above	
2.2	A motor vehicle parts manufacturer belongs to the ____ sector.		(2)
	A	Primary	
	B	Secondary	
	C	Tertiary	
	D	None of the above	
2.3	1st for Women Insurance Company is part of the ____ sector.		(2)
	A	Primary	
	B	Secondary	
	C	Tertiary	
	D	None of the above	
2.4	Best Homes Building CC belongs in the ____ sector.		(2)
	A	Primary	
	B	Secondary	
	C	Tertiary	
	D	None of the above	
2.5	The employees in the ____ sector are mainly unskilled.		(2)
	A	Primary	
	B	Secondary	
	C	Tertiary	
	D	Manufacturing	

[10]  
[84]

**Total: 202 marks**

## Worksheet: Term 3 Project

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### Research a trade union

Work in groups of two or three.

- 1 Research a trade union that is affiliated to COSATU.
- 2 Present your research on an A2 poster.
- 3 Include the following information and headings:
  - Name of the trade union
  - Emblem/logo
  - Short description of its history
  - The goals of the trade union
  - Recent campaigns – include summary of campaign and newspaper article.

The following rubric will be used to assess your project.

CRITERIA	1–3	4–6	7–8	9–10
Name and emblem/logo	The trade union name or emblem/logo is not shown	The name of the trade union and emblem/logo are shown but very little effort was put into the presentation thereof	The name of the trade union and emblem/logo are shown/satisfactory presentation thereof	The name of the trade union and emblem/logo are shown/great care and effort has been made to create a professional presentation
History	The history of the trade union has been researched/ minimum information provided	The history of the trade union has been researched and adequate information has been provided	The history of the trade union has been researched and substantial information has been provided	The history of the trade union has been researched in detail/ interesting facts have been included
Goals	The goals of the trade union have not been clearly defined	The goals of the trade union have been adequately defined	The goals of the trade union have been clearly defined	The goals of the trade union have been clearly defined and examples of how they aim to achieve the goals have been discussed
Recent campaigns	Little information regarding recent campaigns	Some information regarding recent campaigns, but lacks detail	Presents and discusses details of recent campaigns	Discussion and evidence of recent campaigns including dates, pictures, articles and press releases
Overall presentation	Not attractive or neat/little effort made	Satisfactory effort and neatness/ displays some attractive aspects	Good effort and neatness/displays many attractive aspects	Creative, attractive, neat and large amount of effort evident

**Total: 50 marks**

Worksheet: Term 3 Exemplar controlled test

Name: \_\_\_\_\_ Class: \_\_\_\_\_

**SECTION A**

**Question 1**

Say whether the following statements are true or false. Tick the correct answer.

		TRUE	FALSE	
1.1	A trade union is an organisation that was originally established to negotiate with employees.			(2)
1.2	Credit sales affect two general ledger accounts.			(2)
1.3	The financial function is critical as it affects the final cost price of the goods.			(2)
1.4	The Debtors Journal is only used to sell trading stock on account.			(2)
1.5	The public relations function of a business is to deal with all matters relating to employees.			(2)
1.6	A recession is when sales increase and profits are high.			(2)
1.7	Every business uses all eight functions of business.			(2)

**[14]**

**SECTION B: The economy**

**Question 2**

2.1 Explain the purpose of a trade union.

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(6)

2.2 Describe the effect a strike had on education in South Africa.

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(8)

2.3 Describe the effect of a strike by state workers on business.

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(8)

2.4 Do you think teachers' trade unions are acting in the best interests of their members if they call for strike action at the end of a school year? Give reasons for your answer.

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(8)

**[30]**



3.4 Analyse the following transactions in the accounting equation:  
 A = L + OE. (mark-up 40%)

	Source document	Asset	Liability	OE	Amount
E.g. Cash purchase of vehicle	Cheque counterfoil	Bank – vehicle +	0	0	R22 300 –
Purchase trading stock from Blomberg CC. R12 900					
Sold stock to B. Black, R1 764					
B. Black returned damaged goods, R112					
Requested a 2% trade discount left off an invoice for R24 600					
Carstons, a customer, requested a discount of R230 that was left off his invoice					

(20)

[40]

**SECTION D: Entrepreneurship**

**Question 4**

Briefly discuss the characteristics of the following business functions:

4.1 Administration

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(6)

4.2 Comment on the role and importance of the various business functions in a medium size clothing store.

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(10)

**[16]**

**Total: 100 marks**

## Worksheet: Term 4 Revision of Term 3's work

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### The economy

1 Define a trade union.

..... (2)

2 Give a brief outline of the history of trade unions in South Africa.

..... (10)

3 Explain the role of a trade union.

..... (8)



6 How can trade unions contribute to sustainable growth and development in South Africa?

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(12)

7 Look in the newspaper or on the internet to find information on a recent strike.

7.1 Which trade unions were involved?

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.....

(2)

7.2 What was the grievance or problem that led to the strike?

.....  
.....

(2)

7.3 Do you agree with the decision of the trade union to strike?

.....  
.....

(2)

7.4 How did the strike affect the business?

.....  
.....

(2)

**[66]**

## Financial literacy

In Term 3 you revised all the subsidiary books (6) of a sole trader, posted to all the ledgers and prepared a Trial Balance.

### Aluwani Retail Stores has the following information on 1 May 2013:

Debtors balances: Tombi School, R120; Devaldo CC, R8 560;  
 Balck and sons, R10 300; Resin High traders, R5 000  
 Creditors balances: Donga CC, R1 023; Repta Ltd, R0;  
 Subtle Sales, R6 500; PCA Stores, R1 500; Office Supplies Ltd, R0  
 General ledger: Capital, R150 000; Bank (Cr), R19 883;  
 Bank loan, R40 000; Sales, R120 000; Cost of sales, R96 000;  
 Vehicles, R75 000; Debtors allowances, R12 560; Wages, R23 500;  
 Equipment, R23 600; Trading stock, R55 600; Debtors control ?;  
 Creditors control, ?; Stationery, R5 620; Telephone, R3 450;  
 Water and lights, R2 600; Petrol, R4 560; Repairs, R9 846;  
 Entertainment, R1 300; Rates, R9 500; Rent income, R13 300;  
 Commission, R5 000

- 1 Calculate the percentage mark-up. Show all your workings.

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(6)

- 2 Calculate the debtors control amount and explain how you did this.



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(6)

3 Calculate the creditors control amount and explain how you did this.


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(7)

4 Aluwani Retail Stores has the following transactions:

**May 2013**

- 1 Paid Municipality R1 650 for water and lights; delivered stock to Tombi School, R15 620.
- 3 Paid Donga CC R1 023; purchased R12 500 trading stock from Donga CC.
- 5 Purchased cleaning materials from Checkers, R236 and paid Subtle Sales R5 000.  
Issued a receipt to Black and Sons, R5 000 and Tombi School, R120
- 6 Cashed a cheque to pay wages, R2 500; cash sales, R12 560  
Paid Telkom R650 for telephone account.
- 7 Purchased tea, coffee and other consumable stores for the office, R2 650  
Devaldo CC paid R8 000; cash sales, R6 930.  
Devaldo CC purchased R12 360.
- 10 Purchased trading stock from Repta Ltd, R5 620. Received invoice from Subtle Sales for advertising, R3 650.  
Dong CC issued a credit note for stock returned, R560.
- 12 Issued an invoice to Black and Sons, R13 950. Issued a credit note to Devaldo CC for goods returned, R5 620.
- 14 Paid PCA Stores R1 500 and Traders Delight R1 200 for consumable stores.  
Purchased trading stock from Donga CC, R16 560.
- 16 Cash sales, R14 560. Tombi School ordered R8 750 goods that was delivered to them.
- 18 Purchased stationery from PCA stores, R2 350.
- 20 Cashed a cheque to pay wages, R2 500 and purchased stock from Donga CC, R16 560.  
Issued a credit note to Black and Sons for R150 that was incorrectly calculated on their invoice.

- 21** Paid CD Maple R1 200 commission and Donga D R20 000.
- 22** Received invoice from Repta Ltd, R6 350 for trading stock. Issued invoice to Devlado CC for stock, R5 925.
- 25** Paid Repta R11 970 and Office Supplies R10 000.  
Received R6 000 from Senral Agents for rent and Tombi School paid R7 000.  
Office Supplies Ltd delivered equipment, R12 600.
- 26** Cashed a cheque to pay wages, R10 000.
- 27** Cashed a cheque to fill all the vehicles with petrol, R2 500.
- 29** Issued a receipt to Black and Sons, R5 000 and Resin High Traders, R15 000.  
Sent a debit note to Subtle Sales as the invoice on 10 May was incorrectly added up and they overcharged us R73.  
Delivered stock to Black and Sons, R8 755.
- 30** Paid Building Rescue R2 950 for repairs. Issued a debit note to Donga CC for R2 350 for stock that was damaged. Resin High Traders purchased stock, R25 640.  
Black and Sons returned R595 goods that were unsuitable.

Draw up the following journals using your own source document numbers:

- 4.1 Cash Receipts Journal: analysis of receipts, bank, debtors control, sales, cost of sales, sundry accounts. (*Use the template on page 62.*) (19)
- 4.2 Cash Payments Journal: bank, creditors control, wages, consumable stores, sundry accounts. (*Use the template on page 62.*) (24)
- 4.3 Debtors Journal: sales and cost of sales.



(8)

4.4 Debtors Allowances Journal: debtors allowances and cost of sales.



(4)

4.5 Creditors Journal: creditors control, trading store, stationery, sundry accounts. *(Use the template on page 62.)* (11)

4.6 Creditors Allowances Journal: creditors control, trading stock, stationery, sundry accounts. *(Use the template on page 62.)* (6)

5 Post to the General Ledger, Debtors and Creditors Ledgers. *(Use the template on page 61.)* (63)

6 Total all the ledgers and draw up a debtors and creditors list. (11)



7 Comment on the Trial Balance and give suggestions on how the business can reduce the expenses. *(Use the template on page 60.)*

.....

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.....

(23 + 6 = 29)



## Entrepreneurship

- 1 List FIVE functions of a business.

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(5)

2 Zeta Car Spares and Parts is a very large factory making steering wheels and other parts for a local car manufacturing company.

2.1 Complete the following table:

	Description	Characteristics	Role	Importance
Administration				
Purchasing				
Marketing				
Finances				
Public relations				
Human resources				
Production				
General management				
Risk management				

(65)  
[70]

**Total: 371 marks**

## Worksheet: Term 4 Revision

Name: \_\_\_\_\_ Class: \_\_\_\_\_

- 1 Fill in the missing word.
  - 1.1 A ..... is a name given to the collection of accounts of a business. (2)
  - 1.2 A ..... is used to test the arithmetical accuracy of entries in the General Ledger. (2)
  - 1.3 Information from source documents must be entered in ..... order. (2)
  - 1.4 All cash payments are entered in the ..... and the source document is the cheque counterfoil. (2)
  - 1.5 Cash sales are recorded in .....
  - 1.6 ..... is a record of the goods purchased at cost price. (2)

**[12]**

- . As a young entrepreneur, you have decided to start your own dog day care service at your home on the weekends. Your parents have given you permission to use a section of the garden and an empty garage for when the weather is bad. You estimate that you can look after five dogs on your own. You need a number of things to start up your business such as paint to paint the garage, dog beds, water bowls, toys, leashes, cleaning equipment and so on. Your older brother has agreed to invest in your new business and will pay for your start-up costs. However, before he invests any money in the scheme, he would like to see a business plan. Draw up a business plan according to the correct format and include all the necessary headings.

**[30]**

**Total: 42 marks**

## Worksheet: Exemplar end-of-year examination

Name: \_\_\_\_\_ Class: \_\_\_\_\_

### SECTION A

#### Question 1: Multiple choice

Choose the most correct answer from those provided. Write only the correct letter in the space provided.

- 1.1 An economy which allows government intervention, but is not ruled by it:  
A. Planned                      B. Market                      C. Mixed                      D. Open
- 1.2 An increase in supply causes the supply curve to:  
A. Shift to the left                      B. Shrink  
C. Be extended                      D. Shift to the right
- 1.3 Which one of the following is not one of the 4 Ps of marketing?  
A. Product                      B. Planning                      C. Promotion                      D. Place
- 1.4 Which of the following does not appear in the debtors control account in the General Ledger?  
A. Sales                      B. Debtors allowances  
C. Cost of sales                      D. Bank
- 1.5 The department responsible for how customers and employees view the business.  
A. Human resources                      B. Administration  
C. Public relations                      D. Marketing
- 1.6 Which of the following is not a method of filing:  
A. Telepathically                      B. Chronologically  
C. Alphabetically                      D. Thematically
- 1.7 An example of a fixed cost would be:  
A. Equipment                      B. Rent expense  
C. Material costs                      D. Water and electricity
- 1.8 When more is demanded than what can be supplied it is known as:  
A. Shortages                      B. Equilibrium                      C. Break-even                      D. Surplus
- 1.9 Incomes – expenses is known as:  
A. Loss                      B. Break-even                      C. Equilibrium                      D. Profit

1.10 A business in the tertiary sector would be:

- A. Rainbow Chickens      B. DHL      C. Anglo Gold      D. SAB

- 1.1 .....      1.2 .....      1.3 .....      1.4 .....      1.5 .....  
1.6 .....      1.7 .....      1.8 .....      1.9 .....      1.10 ..... (20)

**Question 2: True or false**

State whether the following statements are true or false. Correct all false statements.

2.1 COSATU is the largest trade union in South Africa. (2)  
.....

2.2 Primary sector is responsible for transporting goods to the final consumer. (2)  
.....  
.....

2.3 Workers have a right to choose their work, their working hours and their pay. (2)  
.....  
.....

2.4 UIF is a trade union. (2)  
.....

2.5 Strengths, in a SWOT analysis, are factors that a business can control. (2)  
.....  
.....

**Question 3: Underline the correct word**

- 3.1 The source document for credit purchases is the (invoice/credit note). (2)  
3.2 (Short-term/long-term) goals focus on activities to be completed in 24 months. (2)  
3.3 Individuals in an economy running a business for profit is a (socialist/capitalist). (2)  
3.4 Debtors allowances appear in the (Balance Sheet section/Nominal section) of the General Ledger. (2)  
3.5 (Labour/entrepreneurship) is the factor of production which brings creativity to a business. (2)

**Question 4: Fill in the missing word**

- 4.1 Businesses pay government taxes in return for services and ..... (2)
- 4.2 The factors of production are owned by ..... (2)
- 4.3 The two flows in the economic cycle are the flow of ..... and the flow of ..... (4)
- 4.4 The main source of income for the government is ..... (2)
- 4.5 Government is seen in two ways: as a producer and a(n) ..... (2)
- 4.6 The participants responsible for providing goods and services are ..... and the ..... (4)
- 4.7 Foreign sector belongs in a(n) ..... economy. (2)
- 4.8 Remuneration for labour as a factor of production is ..... (2)

**[60]**

**SECTION B: THE ECONOMY**

**Question 5**

North Korea has been classified as a modern example of a closed economy as their government believes in self-sufficiency.

- 5.1 Define a closed economy.  
.....  
.....  
.....  
..... (4)
- 5.2 Name the alternative economy that North Korea could be.  
..... (1)
- 5.3 Explain the flow of money between households and government.  
.....  
.....  
.....  
..... (4)

5.4 Explain the flow of goods and services between businesses and households.

.....  
.....

(2)

5.5 Name TWO factors of production and the remuneration obtained for each.

.....  
.....  
.....

(4)

### Question 6

Read the case study below and use it to answer the question that follow.

#### **CASE STUDY: Finest Fabrics**

*Finest Fabrics sells formal and cocktail dresses for school dances and weddings. The business is situated in the mall in Durban, but they have noted there is a great demand for dresses, of their quality and style, in the other provinces as well and they are thinking of opening another two branches – one in Cape Town and one in Johannesburg.*

*Many schools are now having dances for grade 7, 10 and 12 learners and therefore more dresses and styles will be needed. Luckily Finest Fabrics has very good suppliers close to them and they can make and alter dresses on demand. The owner has good relationships with all the suppliers and delivery will always happen on time.*

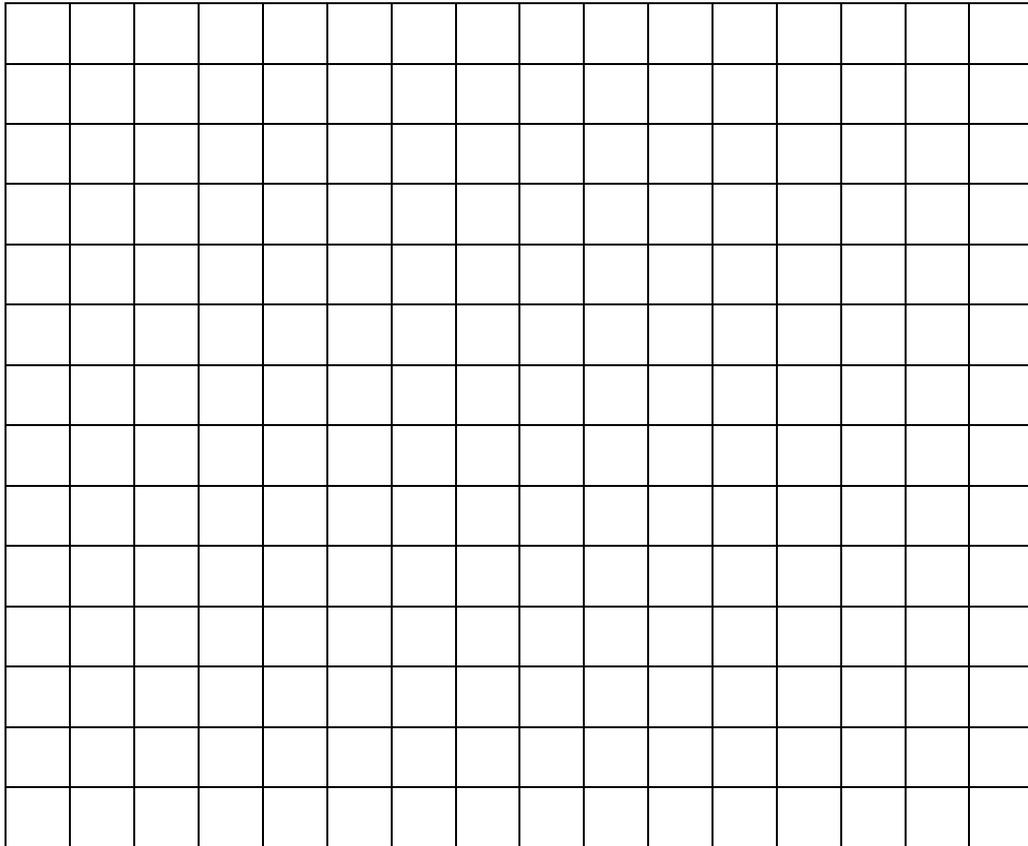
*The owner insists that all staff be properly trained in fitting and adjusting dresses and this serves as a problem when looking for employees as training takes time. All employees must wear pink dresses to work, which they do not like to do and this causes some tension at work, especially during winter months. The recessions had caused a decrease in sales last year, but there is an upward trend now occurring.*

#### **Additional information**

The table below shows the market information for school dance dresses:

Price	Quantity demanded	Quantity supplied
R300	1 300	500
R600	1 000	800
R800	800	1 000
R1 000	600	1 200
R1 300	300	1 500

6.1 Draw the demand curve and the supply curve on the graph provided. Clearly indicate the equilibrium point.



(7)

6.2 What is the market equilibrium price and quantity for dresses?

.....  
.....

(2)

6.3 State TWO ways in which Finest Fabrics can increase demand.

.....  
.....  
.....

(4)

6.4 The workers at one of the factories that supply Finest Fabrics with their dresses have gone on strike. They claim that the factory owner is not complying with laws provided by government on employment, and have approached their trade union.

6.4.1 Name TWO laws employers must comply with in their businesses.

.....  
.....

(2)

6.4.2 What is a trade union?

.....  
..... (2)

6.4.3 Name TWO rights of trade unions.

.....  
..... (4)

6.4.4 Besides a strike, state TWO other forms of industrial action the employee could have done.

.....  
..... (4)

[40]

### SECTION C: Financial literacy

#### Question 7

Use the information given below to complete the Trial Balance for Greg's Grocer on 30 June 2012. The business uses a mark-up of 25% on cost, on all sales made. (*Use the template on page 60.*) (21)

Advertising	2 100	00
Bank	13 000	00
Capital	296 000	00
Cash sales	75 790	00
Credit sales	38 550	00
Creditors control	12 190	00
Debtors allowances	960	00
Debtors control	16 200	00
Drawings	3 900	00
Equipment	36 000	00
Interest expense	3 300	00
Land and buildings	220 000	00
Long-term loan: B Bank	80 000	00
Packing material	1 840	00
Petty cash	500	00
Rent income	8 200	00
Salaries	21 600	00
Trading stock	98 000	00
Water and electricity	1 860	00

### Question 8

Record the transactions of Twilight Traders for June 2010 into the following journals:

- 8.1 Cash Payments Journal (*Use the template on page 62.*) (6)
- 8.2 Creditors Journal (*Use the template on page 62.*) (7)
- 8.3 Debtors Journal (*Use the template on page 62.*) (8)

Note: Do not total the journals.

#### Information:

##### List of debtors:

C. Swan R1 250

M. Norton R860

##### List of creditors:

Jacob Ltd. R2 600

Carlisle & Sons R1 550

Note: Twilight Traders uses a 25% mark-up on cost price.

#### Transactions for June 2010:

- 2 The owner, B. Cullen, increased her capital contribution by 10%. Issued her receipt 86.
- 3 According to the Cash Register Roll (no. 6) sales for the day amounted to R12 600.
- 8 Paid the amount due to Jacob Ltd. with cheque no. 112.
- 10 Paid the wages for the week, R6 800.
- 12 Delivered goods to M. Norton, R390. Invoice 16.
- 13 Purchased the following from Carlisle & Sons: (Invoice 38)
  - Merchandise, R6 200
  - Stationery, R640
- 18 Rosalie bought R7 120 worth of goods and paid cash.
- 20 Bought packing materials from Alice Ltd. for R2 345 and received an invoice.
- 22 Bought stock from Victoria Stores, R3 211, and paid by cheque.
- 25 Sold goods with a cost price of R2 200 on account to C. Swan.
- 30 Bought equipment from Carlisle & Sons, marked at R5 400, on account.

### Question 9

Complete the following ledger accounts for November 2014 for Simon & Sons:

Debtors control (*Use the template on page 61.*) (9)

Creditors control (*Use the template on page 61.*) (9)

(Note: all accounts must be closed off properly at the end of the month)

**Information:**

The following balances appeared in the books of Simon & Sons on 1 November 2010:

Debtors control 3 500

Creditors control 1 700

The business uses a mark-up of 25% on cost price.

Totals of Journals on 30 November 2014:

**Cash Receipts Journal (CRJ11)      Cash Payments Journal (CPJ11)**

Bank	?	Bank	?
Sales	R15 800	Trading stock	R8 250
Cost of sales	?	Wages	R2 500
Debtors control	R2 360	Creditors control	R1 270
Sundry accounts	R1 820	Sundry accounts	R920

**Creditors Journal (CJ11)Debtors Journal (DJ11)**

Creditors control	R7 650	Sales	R13 600
Trading stock	R4 350	Cost of sales	?
Packing material	R1 180		
Sundry accounts	R2 120		

**Creditors Allowances Debtors Allowances**

**Journal (CAJ11)Journal (DAJ11)**

Creditors control	R1 020	Debtors allowances	R2 150
Trading stock	R410	Cost of sales	R1 720
Packing material	R90		
Sundry accounts	R520		

[60]

**SECTION D: Entrepreneurship**

**Question 10**

Daniel has recently been appointed as the Human Resources manager of the international retail store Check & Choose. Although it is a large international business, the staff all work closely as a team and ensure that all business functions are running efficiently and effectively to ensure that Check & Choose remains a successful company.

10.1 Name THREE responsibilities Daniel has as Human Resources Manager.

.....

.....

.....

.....

.....  
..... (6)

10.2 Explain TWO characteristics of the Marketing department.

.....  
.....  
..... (4)

10.3 Besides marketing and human resources, name THREE other business functions that could be found in the business.

.....  
.....  
.....  
..... (6)

**Question 11**

Sophia wants to open her own bakery where she will make all different kinds of pastries and breads. She has been told by a friend that she needs to draw up a business plan, but is unsure of what this entails and why she even needs to do so.

11.1 Give Sophia TWO reasons why she needs to draw up a business plan.

.....  
.....  
..... (4)

11.2 As Sophia is baking the bread on the premises she will need to have a good production plan in place. Name TWO things that would be included in her production plan.

.....  
.....  
..... (4)

11.3 Explain how the bread moves through the various sectors of the economy.

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.....  
.....  
.....  
.....  
.....

(6)

11.4 Sophia wants to add a profit percentage of 86% on each of the products she sells.

11.4.1 If it costs R5.80 to make one loaf of bread, how much should she sell the loaf for to get the profit percentage she is aiming at?

.....  
.....  
.....  
.....  
.....

(4)

11.4.2 How much profit would she make in one day if she sells 180 loaves of bread a day?

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.....  
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(6)

**[40]**

**Total: 200 marks**

# How to develop rubric and checklist assessment tools

## Rubrics

A rubric is a tool teachers use to assess a learner's performance on a specific task. It is presented in the form of a grid that clearly outlines the criteria used for assessment as well as different levels of performance per criterion.

### Benefits of using a rubric

- A rubric helps learners to understand objectives. Developing rubrics with your learners will help them to understand the purpose and content and help them to prepare for the assessment.
- A rubric has a clear and standardised approach to assessment, which ensures that learners are assessed consistently and fairly.
- A rubric allows teachers to provide specific feedback to learners, highlighting areas of strength and areas for improvement.
- A rubric helps learners get a clear idea on how to improve their performance after assessment.
- A rubric allows learners to self-improve. Encourage learners to use the rubric before they hand in their work.
- A rubric is easy to use and can be easily adapted to meet changing needs.

### Steps to creating a rubric

**Step 1:** Clearly define the purpose of the assessment. Use the assessment guidelines in the curriculum documents to determine what task/assignment the learners are required to complete.

#### Step 2: Define the criteria.

Use the objectives in the curriculum documents to consider what skills, knowledge or behaviours the assessment will evaluate.

Make sure that:

- criteria can be observed and measured
- criteria are important to the task at hand
- each criteria assesses a single aspect of the task.

Each criteria contains levels of performance. When creating these, consider:

- what will constitute outstanding achievement
- how will you define moderate or adequate achievement
- how would you define work that falls below expectations.

Ask yourself: Are there key criteria points that should carry a greater weight than others?

#### Step 3: Design a rating scale that clearly defines the levels of performance.

Check your mark allocation to ensure that your rubric falls in line with curriculum expectations.

Make sure you use language and terminology that the learner is familiar with so that they have a clear understanding of what is required of them.

Provide a scale of achievement that can assess the learners' overall competency in completing the task. For example, you can provide an overall mark according to the seven-point rating code or scale of achievement:

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

**Step 4:** Write descriptions of expected performance at each level of the rating scale.

Describe observable and measurable behaviour and use parallel language across the scale. Indicate the degree to which the standards are met. Ensure that learners understand the expectations before and during the assessment.

**Step 5:** Create the rubric.

For ease of use, keep it to one page. Ask your colleagues for feedback and consider testing it before you use it for assessment. After you use the rubric, consider how effective it was and make any necessary revisions.

Exemplar: Present a poster on three different South African entrepreneurs

	1 mark	1 mark	1 mark	1 mark	1 mark	Total for Criteria 5 marks
<b>Entrepreneur One</b>	Name and D.O.B	Product they produce	Is this a good or service	Who is the target market?	What has made this entrepreneur so successful?	
<b>Entrepreneur Two</b>	Name and D.O.B	Product they produce	Is this a good or service	Who is the target market?	What has made this entrepreneur so successful	
<b>Entrepreneur Three</b>	Name and D.O.B	Product they produce	Is this a good or service	Who is the target market?	What has made this entrepreneur so successful	
<b>Pictures</b>			Has included three or more relevant pictures	Has included one or two relevant pictures	Pictures are included but they are decorative	
<b>Presentation</b>				Work is neatly presented and an accurate reflection of learners ability	Work is neat but needed some refinement	
<b>Total</b>						____ / 20

## Checklists

A checklist is a simple assessment tool that provides a list of items or criteria to be checked off. It differs from a rubric in that it provides learners with the criteria of the requirements of an assignment rather than a means of assessing acquired knowledge. A checklist can be used solely by you as a teacher, or you can give your learners a checklist that they can refer to in order to make sure that they have included the required components for a task.

Checklists usually consist of a number of statements that refer to specific criteria and where the answer will be, for example, “Yes” or “No”, or “Achieved”, “Not yet” or “Almost”.

### Benefits of using a checklist

- A checklist ensures that all relevant criteria are assessed and evaluated.
- A checklist helps to ensure consistent assessment of specified criteria.
- A checklist can be used by learners as a self-assessment tool.
- A checklist identifies learning needs in a clear and simple way.
- A checklist is easy to create and use and provides an uncomplicated guide for assessment.

### Steps to create a checklist

**Step 1:** Define the purpose and what you want to assess.

This could be specific skills or a general assessment.

**Step 2:** Identify the criteria.

What specific elements or content will be assessed?

**Step 3:** Create your checklist.

Check that it contains everything you want to assess.

Exemplar:

This checklist serves to assess learner’s understanding of the unit.

<b>Unit Checklist</b>			
	<b>Yes 2</b>	<b>Partially 1</b>	<b>No 0</b>
Learner is able to explore different lifestyles			
Learner is able to research self-sufficient lifestyles			
Learner is able to look into modern societies			
Learner is able to find out about rural societies			
Learner is able to consider unemployment			
<b>Total</b>	<b>_____ / 10</b>		

## Intervention strategies

### Baseline assessment and intervention strategies

Some learners may experience academic backlogs for various reasons, including the impact on learning due to the COVID-19 pandemic, underlying learning barriers or special education needs such as visual or hearing impairments or intellectual barriers. Baseline assessment will help you identify learners that may be experiencing these barriers.

Analysing baseline assessment questions will provide insight into learners' current knowledge and skills regarding certain topics, as well as their preparedness for the work ahead. The results of baseline assessments can help to identify the areas where learners require support and/or intervention.

Learners may require support and/or intervention for the following reasons:

- barriers to learning
- class size
- reading comprehension (the ability to understand what they have read).

### Barriers to learning

Some learners may face barriers to learning. It is important to accommodate learners with barriers to learning to ensure that our classrooms remain inclusive. These learners may require and should be granted more time for completing tasks, acquiring thinking skills (own strategies), and completing assessment activities. Adapt the number of activities to be completed without interfering with learners gaining the required skills. Learners experiencing barriers to learning can also be paired with others who may be able to support them.

### Class size

- Peer tutoring can be an effective intervention method when class size is problematic.
- Quieter learners often struggle in a large class, as they tend not to ask questions. Organising learners into groups or pairs can help to create a more inclusive and enabling learning environment.
- Ensure that groups are made up of learners with varying ability, so that learners who may be struggling are supported by their peers.
- Peer assessment can also be used successfully during informal assessment and allows you to gauge learners' understanding in a less intimidating manner than a formal test or assignment.
- The following strategies can be used in a large class:
  - *Thumbs up/thumbs down:* Check understanding by a show of thumbs. Thumbs up indicate that learners have understood; thumbs down show that they have not understood; thumbs sideways could show that they are not sure.
  - *Response boards:* These are small chalkboards or whiteboards where learners record their response to a question. When you say "Show your answers" they all hold up the board. This way you can quickly see who is struggling.
  - *Show fingers 1-2-3:* Ask learners to show fingers to indicate if they understand activity instructions before working in a group. 1 = I do not understand; 2 = I sort of understand but I need some help; 3 = I understand completely.

## **Reading comprehension**

- Support learners by giving them pre-reading questions and post-reading strategies to organise what they have learnt. Pre-reading questions could include asking the learners what they already know about the topic. Teach learners to summarise the content into bullet points and make use of mind maps. This requires the learners to rewrite the content in their own words.
- Write difficult terminology on the board and give simple explanations.
- Diagrams can be very useful to explain concepts in a way that learners can visualise the situation.

## **General teaching intervention strategies**

### **Teach from the learner's point of view**

- Put yourself in the learner's position: If you were the learner, what would you like the teacher to explain or show you that you could not learn previously?
- Remember that learners might still have emotional issues related to the COVID-19 pandemic, which you may need to address.

### **Reteach topic(s) for which learners achieved low scores (closing the gap)**

- Focus on concepts, and not only on factual content. Then use illustrations to support learners' understanding and avoid superficial rote learning. The more "real-life" examples used, the easier it will be for the learners to conceptualise the topic.
- Make the structure of your lessons and teaching materials clear: State specific, achievable goals, provide graphic organisers to link parts of the lesson and give frequent summaries of sections of the lesson. A graphic organiser can be any visual representation of content that gives an immediate overview of main points.
- Refer frequently to your progress in terms of the lesson structure. This will help learners to develop an overall and cohesive (holistic) grasp of the content.
- Skills, knowledge and concepts run like threads through the previous grades. Explain these threads to learners, as you begin teaching a new topic or module – it will help learners to link the new content to what they already know.

## **Metacognition**

Metacognition is the ability to understand our own thought processes. It is essential that metacognition takes place during lessons.

Learners retain information best when they can visualise situations. Visual aids, such as flash cards and mind maps, and practical work can aid with developing metacognition, or getting learners to think about and understand their own thought processes. After completing practical tasks, give learners sentence starters to complete. For example: I learnt . . . ; I wonder . . . ; I still want to know . . . ; I still don't understand . . . ; I still have a question about . . .

## **Retaining information**

- Flash cards and mind maps can be useful tools to help learners memorise facts.

- Encourage learners to break down content into more manageable sections. They can then create a mind map for each sub-topic. Tables can also help learners summarise content into more manageable sections.
- A mnemonic is a word, sentence or poem that helps you remember something. Mnemonics help learners to memorise content. Use the first letter of each word to create a sentence that the learners can memorise easily. For example, a mnemonic such as “Eat **An Apple As A Nice Snack**” can help learners to memorise the names of the continents: **E**urope, **A**sia, **A**frica, **A**ustralia, **A**ntarctica, **N**orth America, **S**outh America.

### **Develop presentation skills**

Many learners find it challenging to speak in front of the class, but this improves with practice. Encourage learners to answer questions in class and take part in class discussions by using one or more of the following strategies:

- *Use the think-pair-share method:* Posing a question and giving learners a short time to think about it, followed by discussion with a partner and then sharing with others. Learners who are shy will find it easier to share ideas with a partner first.
- *Tell-check-say:* A learner tells the answer to a friend, together they check if the answer is correct by referring to the textbook, and then the first learner says the answer out loud to the class or writes it down.
- *Target basic and then more advanced questions to specific learners based on their readiness to answer them:* A good strategy is to first ask the question to the whole class. This ensures that everyone thinks about it. Then, ask a specific learner the question.
- *Keywords on cards:* These can be used to help the learner remember their presentation. Eye contact is essential, so emphasise to learners that they should not read their presentation.

### **Interventions for learners with special education needs**

- Special educational needs may include visual or hearing impairments or intellectual barriers. Do not form an opinion about a learner too early. This could lead to an inaccurate assessment of a learner’s barrier, or an inaccurate assessment of the existence of a barrier (when in fact there may not be one). If the barrier is obvious after the first term and becomes a serious obstacle to the learner, seek professional help from the district office.

Immediate steps could include: observing the learner inside and outside of the classroom, contacting the learner’s previous teachers and consulting with them.





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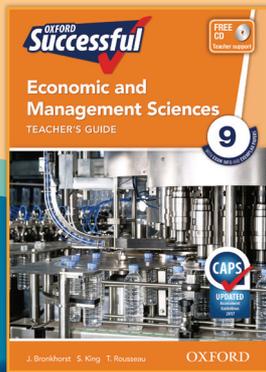
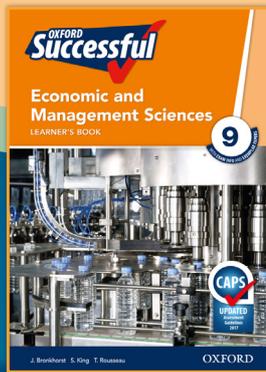
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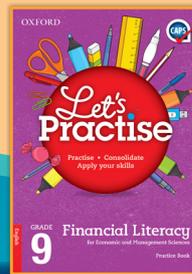
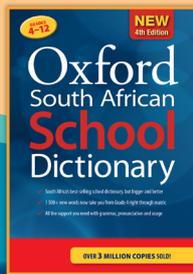
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