



PLANNER & TRACKER

Economic and Management Sciences Grade 8

- *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 9

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 assessment worksheets

Term 1	TG page 28
Term 2	TG page 63
Term 3	TG page 93

Revision of work from previous term

Revision of Term 1	TG page 122
Revision of Term 2	TG page 126
Revision of Term 3	TG page 129

End of term consolidation

Term 1 (Exemplar controlled test)	TG page 135
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Term 4 (Exemplar end-of-year examination)	TG page 142

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

Term 1 controlled test	TG page 147
Mid-year examination	TG page 156
Term 3 controlled test	TG page 151
End-of-year examination	TG page 162

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TERM 1

Progress tracker for Oxford Successful Social Sciences Grade 8 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>Revision</p> <ul style="list-style-type: none"> Revise the general knowledge learners have about the economy ▪ Life without money <p>The economy: Government</p> <ul style="list-style-type: none"> Meaning of government Different levels of government Roles of the different levels of government in respect of households in the use of resources and services (both as consumer and producer) Roles of the different levels of government in respect of businesses in the use of resources and services (both as consumer and producer) 		Term 1 LB: pp.8	2 hours		
2-4	<p>The economy: National Government</p> <ul style="list-style-type: none"> Meaning of government Different levels of government Roles of the different levels of government in respect of households in the use of resources and services (both as consumer and producer) Roles of the different levels of government in respect of businesses in the use of resources and services (both as consumer and producer) 		Term 1 Unit 1 LB: pp. 12	8 hours		
5-6	<p>The economy: National Government</p> <ul style="list-style-type: none"> Government revenue: Direct tax, indirect tax, government expenditure on services such as education, health, housing, social grants, transport, security, etc. The influence of the national budget on growth and redressing of economic inequalities 	Term 1 Worksheet: Data response – interrogate the national budget TRB: pp. 11	Term 1 Unit 2 LB: pp. 20	4 hours		

7	<p>The economy: Standard of Living</p> <ul style="list-style-type: none"> Lifestyles, modern societies, rural societies, the impact of development on the environment, unemployment, productive use of resources to promote a healthy environment 		Term 1 Unit 3 LB: pp. 28	2 hours		
8	<p>Financial Literacy: Accounting Concepts</p> <ul style="list-style-type: none"> Sole trader, debit, credit, capital, owner's equity, income, expenses, profit, losses, transactions, liability, assets, banking, cash receipts, cash payments, subsidiary journals, accounting equation: Assets = owner's equity + liabilities (A = O + L) 		Term 1 Unit 4 LB: pp.33	2 hours		
9	<p>Financial Literacy: Source documents</p> <ul style="list-style-type: none"> Receipts, deposit slips, cash register slips (till slips), electronic funds transfer (EFT), bank statements cash invoices 		Term 1 Unit 5 LB: pp 45	2 hours		
10-11	<p>Revision and Assessment</p>	<p>Term 1 Exemplar: Control Test TRB: pp. 13</p>	LB p. 55; TG p. 135	4 hours		

TERM 2

Progress tracker for Oxford Successful Social Sciences Grade 8 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>Revision</p> <ul style="list-style-type: none"> Revised the work covered in term 1 Give learners an overview of the work of term 2 	<p>Term 2 Revision Test: Revision of Term 1 TRB: pp.16</p>	<p>Term 2 LB: pp. 58</p>	<p>2 hours</p>		
2-3	<p>Financial Literacy: Overview of the accounting cycle, accounting equations</p> <ul style="list-style-type: none"> Transactions, source documents, subsidiary journals, general ledger Trial balance ▪ Income statement Balance sheet Cash transactions (receipts) on the accounting equation Assets = owner's equity + liability (A=OE+L) 		<p>Term 2 Unit 1 LB: pp 62</p>	<p>4 hours</p>		
4-7	<p>Financial Literacy: Cash Receipts</p> <ul style="list-style-type: none"> Concept of a cash receipts journal (CRJ) of a service business, formats and uses of the columns in the CRJ, documents used to complete the CRJ Entering cash transactions in the CRJ, closing off the CRJ Cash Receipts Journal: 		<p>Term 2 Unit 2 LB: pp 68</p>	<p>8 hours</p>		

	<ul style="list-style-type: none"> Recording the cash transactions in the CRJ Closing off the CRJ Cash Receipts Journal The effect of cash transactions on the accounting equation 						
8	<p>Factors of Production</p> <ul style="list-style-type: none"> Capital – borrowed and own capital Labour – unskilled, semiskilled and skilled labour, the role of workers in the business, fair employment practices Natural resources: Remuneration of factors of production 			Term 2 Unit 3 LB: pp. 77	2 hours		
9-11	<p>Revision and Assessment</p>			LB p. 94 TG p. 139	6 hours		
				Term 2 Exemplar: Mid-year examination TRB: pp. 23			

TERM 3**Progress tracker for Oxford Successful Social Sciences Grade 8
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
1-4	Entrepreneurship <ul style="list-style-type: none"> • Sole traders • Partnership • Characteristics • Private • Public companies • Characteristics • Comparison of the 4 forms of ownership • Characteristics • The role of forms of ownership in sustainable job creation and use of natural resources 	Term 3 Case Study: Dimension Data TRB: pp.37	Term 3 Unit 3 LB: pp 121	8 hours		
5-6	Financial Literacy: Cash Payment Journals <ul style="list-style-type: none"> • Cash payment journal of service business • Formats and uses of the columns • Sources • Documents used Cash payment journal of service business Formats and uses of the columns Sources Documents used		Term 3 Unit 1 LB: pp 103	4 hours		

7-8	<p>Financial Literacy: Accounting equations</p> <ul style="list-style-type: none"> • Cash receipts journal: The effect of cash transactions on the accounting equation • Cash receipts journal and cash payments journal: ▪ Entering combined transactions in the CRJ and CPJ • Closing off of CRJ and CPJ • Effect of cash transactions • Accounting equations 		Term 3 Unit 2 LB: pp. 109	4 hours		
9-10	<p>The economy</p> <ul style="list-style-type: none"> • Factor market (labour and financial markets) • Types of markets – goods and services market 	<p>Term 2 Project: Research a consumer good TRB: pp.21</p>	Term 2 Unit 4 LB: pp 87	4 hours		
11	<p>Revision and Assessment</p>	<p>Term 3 Exemplar: Exemplar controlled test TRB: pp. 36</p>	LB: pp. 131; TG: pp. 137	2 hours		

TERM 4**Progress tracker for Oxford Successful Social Sciences Grade 8
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
1-3	Entrepreneurship <ul style="list-style-type: none"> • Different levels of management • Management tasks such as planning, organising, leading and control (POLC) • Characteristics of good management 		Term 4 Unit 1 LB: pp. 137	6 hours		
4-5	Financial Literacy: General Ledgers <ul style="list-style-type: none"> • General ledger, Taccounts • Double entry principle • Opening ledger accounts • Record accounts in the cash journals, • Post to the ledger 		Term 4 Unit 2 LB: pp. 144	4 hours		
6	Financial Literacy: General ledgers and trial balance <ul style="list-style-type: none"> • General ledger • Trial balance of a service business 		Term 4 Unit 2 LB: pp. 153	2 hours		
7-10	Revision and Assessment	Exemplar end-of-year examination 56	Exam preparation LB pp. 164–169	8 hours		

Worksheet: Term 1 Data response

Name: _____ Class: _____

Interrogate the National Budget

Read the commentary on the 2012 National Budget and answer the following questions.

National Budget proposals announced by Minister Gordhan reflect a policy of investment in infrastructure and upliftment of the population through education, health and social assistance. However, reduced revenue collections due to the slower economic environment, not only here but in most of South Africa's main trading partners, mean that the Minister has to look elsewhere for the necessary additional income. The most visible increases are in taxes on capital gains and on non-resident shareholders' dividends. So, as was the case last year, taxpayers will provide the funds for Government's key objectives.

Adapted from:

www.nortonrose.com/knowledge/publications/63350/south-african-national-budget-2012

1 Outline the purpose of a national budget.

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

(5)

2 Identify the focus of the 2012 National Budget.

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

(5)

3 Mention TWO sources of government revenue, other than income taxes.

.....
.....

(2)

Worksheet: Term 1 Exemplar controlled test

Name: _____ Class: _____

SECTION A

Question 1

Complete the following sentences. Write only the question number and the missing word.

- 1.1 societies make use of specialisation and depend on employment to satisfy their needs. (2)
- 1.2 is used to plan how the government spends its income. (2)
- 1.3 Furniture and vehicles are called
- 1.4 VAT and import duties are known as taxes. (2)
- [8]

Question 2

Circle the correct word/phrase in brackets.

- 2.1 Municipalities form part of the (provincial/local) government. (2)
- 2.2 A (lifestyle/self-sufficient society) is a way to describe how families live, for example their attitude, style, possessions and the things they do. (2)
- 2.3 (Debit/credit) is the left-hand side of a General Ledger account. (2)
- 2.4 The accounting equation is (Assets + Liabilities = OE/
OE = Assets – Liabilities) (2)
- [8]

[Total for Section A: 16]

SECTION B: THE ECONOMY

Read the extract on page 56 of the Learner's Book to answer the following questions.

Question 3

3.1 List TWO ways government receives revenue.

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

3.2 Explain the term 'infrastructure' and explain how this will assist workers, businesses and individuals.

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

3.3 Do you think this Budget will influence growth and redress economic inequalities? Give reasons for your answer.

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.....
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.....
.....
.....
.....
..... (8)

[Total for Section B: 14]

SECTION C: FINANCIAL LITERACY

Question 4

4.1 Identify the correct source document for the following types of transactions:

4.1.1 Purchase goods (1)

4.1.2 Go to the bank to put cash and cheques in the bank account (1)

4.1.3 Receive money from a customer (1)

4.1.4 The bank sends information about the business bank account (1)

.....
[4]

4.2 Explain the term Owner's Equity.

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.....

(4)

4.3 Do you think every business owner should be able to do accounting?
Give reasons for your answer.

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(6)

4.4 Is it necessary for a sole trader to have a separate bank account for
the business? Give reasons for your answer.

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(6)

[Total for Section C: 20]

Total: 50 marks

Worksheet: Term 2 Revision of Term 1's work

Name: _____ Class: _____

The economy

How the budget will be spent

Public order and safety	9%	General public services:	14%
Contingency reserves	1%	Housing:	12%
Health	12%	Education:	19%
Economic affairs	14%	Social protection:	15%
Defence	4%		

Work in groups of five. Use the Internet or obtain a newspaper copy of the National Budget for the current year. Or you can use the information given above.

Debate

Each group must elect a spokesperson for the debate. Each group must represent one of the following: Government, Department of Education, Department of Defence, Department of Health, Department of Social Protection (services).

- 1 The spokesperson for the government must justify the division of revenue among the different government departments and give reasons for this.
- 2 Each remaining department spokesperson must give reasons why they need an increase and suggest the amount of the increase. They also need to give suggestions on where the increase should come from.

Poster

Each group must choose a different level of government, for example national, provincial or municipal. (Number each group from 1–3. Group 1 must do national government, Group 2 must do provincial government and Group 3 must do municipal government. More than one group can do each level of government.)

Each group must put together a poster that shows the following:

- Sources of income or revenue
- Types of expenditure
- How their level of government can use their budget to redress inequality and injustice
- The role of their level of government as consumer and producer in their use of services and resources.

[50]

Standard of living

1 Use newspapers, the Internet or visit a library to find pictures and photographs that explain the following terms. Use your own pages to paste the pictures under each of the following terms, and write a paragraph explaining each term. Give the characteristics, advantages and disadvantages of the different societies.

1.1 lifestyle

1.2 self-sufficient society

1.3 modern society

1.4 rural society

(4 x 4 = 16)

2 Read the extract on page 59 of the Learner's Book to answer the following questions:

2.1 Explain the role of national and provincial government in the use of scarce resources.

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.....

(6)

2.2 Do you think the environmental groups are correct in opposing this development? Give reasons for your answer.

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(10)

2.3 If you were living in this area, would you support the development?
Give reasons for your answer.

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(10)

2.4 How would you feel about this development if you were unemployed
and living in this area? Give reasons for your answer.

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(10)

[52]

Financial literacy

1 Classify the following under the correct heading in the table.

capital	computer	fee income	interest received	office furniture
rent received	rent	salaries	sales	telephone
trading stock	vehicle	wages	owner takes good for own use	

Asset	Liability	Owner's equity	Income	Expense

(14)

- 2 Zanele is a beauty therapist who works in the Beauty Spa at the local gymnasium. She is fully booked all the time. She has been asked to start her own business at the hairdressing salon near her home. She has R20 000 in an investment account that is earning 5% interest per annum. She has calculated she will need a total of R40 000 if she decides to start the business.

2.1 Compare an investment with starting your own business.

.....

(12)

- 2.2 Zanele will only accept cash from customers in her new business. What documents will she need to use? Give reasons for your answer.

.....

(12)

2.3 Suggest a business bank account that she should use and what benefits this account would give her.

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(10)

2.4 How would Zanele know if she is making a profit?

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(6)

2.5 Explain the advantages and disadvantages of a sole trader.

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(12)

2.6 If you were Zanele, would you start your own business?
Give reasons for your answer.

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(10)

2.7 Explain what a bank statement is and give FOUR types of transactions that you would expect to see on one.

.....

(8)

Question 3

3.1 Complete the cheque with the following information:
 Lindsay Munsa pays Wannies Clothing Boutique R680 for a pair of gold pumps on 6 October 2012. She had R1 300 in her bank account on 1 October and deposited R5 700 on 3 October.

Date: _____	RABOBANK	253 225
To: _____	SCOTTBURGH BRANCH	_____ 20 _____
For: R _____	Pay _____	or bearer
Balance b/f _____	the sum of _____	
Deposit: _____	_____	<input type="text"/>
This cheque: _____		
Balance: _____	Signature: _____	

0132 0132 253225 4053372267

(12)

3.2 What is Lindsay's cheque account number?

.....

(1)

3.3 What is the number of the branch where Lindsay has her account?

.....

(1)

[98]

Total: 200 marks

Worksheet: Exemplar mid-year examination

Name: _____ Class: _____

SECTION A

Question 1

Fill in the missing word.

- 1.1 Excise taxes are also known as (2)
- 1.2 is an improvement in the standard of living. (2)
- 1.3 Stationery is an example of a/an (2)
- 1.4 Act regulates the right to fair labour practices. (2)
- 1.5 Besides Equipment, an example of a Fixed Asset is (2)

[10]

Question 2

Match the correct answer in column B to the statement in column A. Write only the corresponding letter in the answer space.

	COLUMN A	COLUMN B	
2.1	A market where skills and experience are sold	A	Balance sheet
2.2	A bank loan to start a business	B	Factor
2.3	A list of all the accounts which appear in the General Ledger	C	Cheque
2.4	Source document that should be signed by more than one person in a business	D	Borrowed capital
2.5	Remuneration for capital	E	Interest
		F	Profit
		G	Trial Balance

2.1 2.2 2.3 2.4 2.5 [10]

[Total for Section A: 20]

SECTION B: THE ECONOMY

Question 3

2010 was a very important year for South Africa as a whole when the country was given the honour of hosting the Soccer World Cup. It took years of planning and a large amount of money, labour and vision to get the country and stadiums ready for the event.

3.1 Name ONE way in which the government would obtain the revenue to finance the building of the new stadiums. (1)

3.2 Explain the term 'indirect tax'. (2)

3.3 Do you think the building of these stadiums was a good investment for South Africa? Give reasons for your answer. (6)

3.4 Discuss how the factor market affects the building of a soccer stadium. (6)

[15]

[Total for Section B: 15]

SECTION C: FINANCIAL LITERACY

Question 4

4.1 Do you think it is necessary to have an analysis of receipts and bank column in the Cash Receipts Journal? Give reasons for your answer.

(4)

4.2 Alan started his own cleaning service. He is contracted by businesses to go into their offices after hours and clean them. Use the information provided below to analyse the transactions according to the accounting equation.

Transactions for December 2013:

- 3** Paid the Electricity account for the month, R180.
- 10** Received R800 for the cleaning of the offices at Bonus Bank.
- 22** Paid wages for the week. There are four employees who each earn R100 a week.
- 28** Bought cleaning materials to use while rendering the service, R648.

(8)

[12]

Question 5

Use the transactions shown below to complete the Cash Receipts Journal of Melanie’s Meals on Wheels for June 2013. (*Use the Cash Receipts Journal template on page 62.*)

Transactions for June 2013:

- 2 Supplied a family of six with a meal and received R280. Issued receipt 86.
- 5 Received R120 interest from Trust Bank on a fixed deposit held by the business.
- 13 Provided catering services for a corporate function at Smart Solutions. Received R1 200.
- 18 Melanie, the owner, increased her capital contribution by R25 000. She made a direct deposit into the bank account. (13)

[Total for Section C: 25]

SECTION D: ENTREPRENEURSHIP

Question 6

6.1 Explain the difference between skilled and semi-skilled labour.

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.....

.....

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.....

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.....

.....

(8)

Worksheet: Term 3 Revision of Term 2's work

Name: _____ Class: _____

The economy

1 Identify and explain the two main types of markets.

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

(2)

2 Tabulate the differences between these two types of markets.

(8)

3 Identify which market each of the photographs on page 99 of the Learner's Book belong to. Give reasons for your selection

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

1.2 Arrange the tasks according to what must be done every day, at the end of the month and at the end of the financial period.

.....

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.....

.....

.....

(7)

1.3 Explain the purpose and importance of cash journals.

.....

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.....

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.....

.....

.....

(8)

1.4 Draw a diagram showing the flow of cash from the time the business receives cash from a customer until it is put into the bank account at the bank.



(10)

Question 2

Sally started a business that provides cleaning services for homes and business premises. Her business is called 'Classic Cleaners'. She shares the premises with Manny's Home Repair Services.

Transactions: June 2013

- 1 Manny paid Sally R3 000 for rent. (Receipt 32)
- 3 Cash received from Best Buys CC, R1 690 (Receipt 43)
- 4 Sally collected R4 500 from Benny Boekwurm for cleaning services for the past two months. (Receipt 44)
- 8 Cash received from Village High School for special cleaning after their Grade 12 ball, R1 670 (Receipt 45)
- 12 Sally had flu for the past week and only collected R250 in fees. (Receipt 46)
- 15 Sally arranged for a friend to help as she was still not feeling well. Ingrid collected R1 560 (Receipt 47)
- 20 Received cash from Intel Building Services, R3 600. (Receipt 48)
- 25 Received the bank statement: interest income, Receipt 54; Estate Agencies CC paid R2 500 for their monthly cleaning services by Internet.

Required

- 2.1 Explain the purpose of an analysis of receipts column.

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

- 2.2 Give TWO reasons for a bank column in the CRJ.

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

- 2.3 Enter the transactions in the CRJ for June. (*Use the Cash Receipts Journal template on page 62.*)

- 2.4 Total the CRJ below. (26)
[64]

Entrepreneurship

Question 1

Choose the most appropriate answer. Write the correct letter in the space provided.

1.1	____ is the reward an owner receives for investing money in a business rather than in another form of investment.		
	A	Salary	(2)
	B	Interest	
	C	Profit	
	D	Productivity	
1.2	The reward for a bank that loans money to an entrepreneur is ____.		
	A	rent	(2)
	B	profit	
	C	interest	
	D	salary	
1.3	A business that purchases in large quantities so that customers can benefit from lower prices is called a ____.		
	A	retailer	(2)
	B	market	
	C	wholesaler	
	D	discount business	
1.4	Own capital consists of ____.		
	A	money, vehicles and equipment	(2)
	B	only money	
	C	only equipment and vehicles	
	D	money and loans from banks	
1.5	Labour consists of ____.		
	A	mental and physical effort	(2)
	B	mental effort	
	C	physical effort	
	D	workers in a factory	

[10]

Question 2

Write down whether the statement is true or false. Re-write the false statements to make them true.

2.1 Wages and salaries are paid every month.

.....

2.2 Semi-skilled labour is paid the same as unskilled labour according to the Labour Relations Act.

.....

2.3 Equal opportunity for all is the purpose of the CCMA.

.....

2.4 Employment Equity means that only previously disadvantaged workers may be employed in a company.

.....

.....

[8]

Question 3

3.1 Compare own and borrowed capital.

.....

.....

.....

.....

.....

.....

.....

(8)

3.3 Can capital mean anything other than money? Give reasons for your answer.

.....

.....

.....

.....

.....

(6)

3.6 What is the purpose of the CCMA?

(6)

3.7 Discuss natural resources as a factor of production.

(10)

3.8 Why do you think entrepreneurship is a factor of production?
Give reasons for your answer.

(10)

[81]

Total: 191 marks

Worksheet: Term 3 Case study

Name: _____ Class: _____

Dimension Data

Read the report by Dimension Data CEO, Brett Dawson, on page 127 of the Learner's Book. Answer the questions below.

- 1 Describe your understanding of sustainable business and its relationship to creating sustainable jobs.

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

(6)

- 2 From the information in the report, do you think that Dimension Data is a good role model for business regarding creating sustainable jobs? Explain your opinion.

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(8)

- 3 Explain your opinion about the statement that 'unemployment must be

Worksheet: Term 3 Exemplar controlled test

Name: _____ Class: _____

SECTION A

Question 1

Which of the following statements are TRUE or FALSE? Tick the correct answer.

		TRUE	FALSE	
1.1	Cash received from customer for services = A+; OE +12.2			(2)
1.2	Cash received to increase capital = A+; OE-			(2)
1.3	A cheque is the source document for recorded payments in the CPJ.			(2)
1.4	A loan from the owner is a liability to the business.			(2)
1.5	A receipt is used to record cash received from customers in the CRJ.			(2)
1.6	Subsidiary books are used to record every transaction.			(2)

[12]

Question 2

Choose a description or example from Column B that matches a term in Column A. Write only the letter next to the question number.

	COLUMN A		COLUMN B
2.1	Close corporation	A	Gerry Pratt (Pty) Ltd
2.2	Partnership	B	Gerry Pratt
2.3	Private company	C	Gerry Pratt Ltd
2.4	Public company	D	Gerry Pratt CC
2.5	Sole trader	E	Gerry Pratt Inc
		F	Gerry Pratt and Sons

2.1 2.2 2.3 2.4 2.5 [10]

Question 3

Fill in the correct word.

- 3.1 A close corporation has between one and members. (2)
- 3.2 A private company has a minimum of owner(s). (2)
- 3.3 A public company has a minimum of one and
..... owners. (2)
- 3.4 The shares of a public company are transferable on the
Johannesburg Stock Exchange. (2)

[8]

[Total for Section A: 30]

SECTION B: FINANCIAL LITERACY

Question 4

- 4.1 Enter the following transactions in the subsidiary journals of Tapello Garden Services. Close off the journal at the end of the month. Use your own source documents:
CRJ: analysis of receipts; bank; fee income; sundry accounts
CPJ: bank; consumable stores; sundry accounts
(Use the template on page 62.)

Transactions for March 2013

- 1 Tapello opened a business bank account with R5 000
- 4 Purchased equipment from Garden Supplies, R2 500
Paid rent on premises, R900 to Jack’s Nursery.
- 6 Services rendered, R360
- 13 Services rendered, R780
- 20 Purchased seedlings and plants from Jack’s nursery, R680;
Services rendered 680
- 22 Purchased stationery, R90 and business cards from PP
Stationers. (30)

- 4.2 Calculate his bank balance at the end of the first month.
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..... (4)

4.3 Do you think Tapello has made the right decision to start his own business? Give reasons for your answer.

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(6)

[Total for Section B: 40]

SECTION C: ENTREPRENEURSHIP

Question 5

5.1 Who are the owners in a:

(a) Partnership

..... (1)

(b) Company

..... (1)

5.2 Tabulate FOUR differences between a private and public company.

Private company	Public company

(16)

Worksheet: Term 4 Revision of Term 3's work

Name: _____

Class: _____

Entrepreneurship

Question 1

Complete the following table.

	Sole trader	Partnership	Close corporation	Private company	Public company
Name	(1)	(1)	(1)	(1)	(1)
Name of owners	(1)	(1)	(1)	(1)	(1)
Number of owners	(1)	(1)	(1)	(1)	(1)
Capital	(1)	(1)	(1)	(1)	(1)
Liability for business debts	(2)	(4)	(2)	(2)	(2)
Share of profit	(2)	(2)	(2)	(4)	(4)
	Sole trader	Partnership	Close corporation	Private company	Public company

Continuity	(1)	(1)	(1)	(1)	(1)
Management	(1)	(1)	(4)	(4)	(4)
Legal requirements	(1)	(1)	(4)	(6)	(6)
Formation	(2)	(4)	(4)	(10)	(10)

(113)

Question 3

Tshedi Pule has inherited money from her grandmother. As a qualified attorney with a lot of experience, she would like to use the money to set up her own business. She was approached by an accountant and financial advisor who would both like to join her to provide an all-round service to clients.

3.1 Define an entrepreneur.

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.....

(4)

3.2 List and explain FIVE characteristics of an entrepreneur that Tshedi will need to have.

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(15)

3.3 Discuss FIVE advantages of entrepreneurship.

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(10)

3.4 Explain FOUR disadvantages of starting your own business.

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(8)

3.5 Suggest a form of ownership and give her advice on whether she should go on her own or join forces with the other two people. Give reasons for your suggestions.

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.....

(8)

Question 4

Tabulate the differences between the following forms of ownership:

4.1 Sole trader and private company

Sole trader	Private company

(12)

4.2 Close corporation and partnership

Close corporation	Partnership

(12)

3.3 Private and public companies.

Private company	Public company

(12)

Question 5

‘All businesses should make protection of the environment their primary concern.’

5.1 Discuss the role of businesses and companies in creating sustainable jobs.

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(10)

5.2 Do you agree with the statement? Give reasons for your answer referring to the sustainable use of natural resources.

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(8)

[232]

Financial literacy

Question 1

1 Match the columns.

1.1	Assets	A	The money and possessions an owner uses to start a business
1.2	Capital	B	Used to keep records of all cash receipts
1.3	Cash Payments Journal	C	A business that buys products and resells them at a profit
1.4	Cash Receipts Journal	D	Proof of money being received by the business
1.5	Cheque	E	Bank, vehicles, buildings
1.6	Deposit slip	F	Income R23 900; Expenses R21 600
1.7	Drawings	G	Used to enter all payments by cheque in the subsidiary journal
1.8	Liabilities	H	Completed when money and cheques are deposited in the bank account
1.9	Profit	I	Used to make payments without using actual cash
1.10	Receipt	J	Bank loan, bank overdraft
1.11	Retailer	K	A business that charges for knowledge, experience and skill
1.12	Service business	L	Statement showing the difference between what you own and what you owe
1.13	Statement of net worth	M	An exchange of a financial nature
1.14	Transaction	N	What the owner withdraws from the business
		O	Subsidiary book used to record all payments

1.1	1.2	1.3	1.4	1.5	
1.6	1.7	1.8	1.9	1.10	
1.11	1.12	1.13	1.14		[28]

Question 2

Amandla is a qualified plumber and general handyman that does all household repairs. He has two people working for him.

Transactions for April 2013

- 1 Owner deposits R40 000 in the bank account to start a business.
(Receipt 01)
- 3 Received R20 000 from Robo Bank.
- 4 Amandla purchased a second-hand truck, R25 000 (cheque 001)
- 5 Received fee income, R5 600.
- 6 Paid the following by cheque:
Building Specialists, R4 500 for supplies
Cosmos Estate Agent, R5 800 rent
CPA for stationery, R560
Office equipment, R15 600 for office furniture and equipment
- 7 Fee income, R12 780
- 8 Paid Traffic Department for new vehicle licence, R560.
- 15 Fee income, R14 370
- 18 Installed an immobiliser and alarm in the truck, R7 400. Paid cheque to Security Specialists.
- 23 Fee income R560
- 25 Purchased cell phone contract, R560 from Vodacom.
- 27 Amandla cashed a cheque to pay his children’s school fees, R560
- 30 Cashed a cheque to pay wages, R8 500.

Required

- 2.1 Draw up the Cash Receipts and Cash Payments Journals for Amandla for April. Complete the source documents. *(Use the template on page 62 for both journals.)* (19 + 28) (47)
- 2.2 Total the subsidiary journals
- 2.3 Calculate the bank balance at the end of April.

(4)

2.4 Analyse the entries on the following dates in the accounting equation:

2.4.1 1 April

2.4.2 5 April

2.4.3 6 April

2.4.4 27 April

2.4.5 30 April

No.	Source document	Assets	Liabilities	Owner's Equity

(19)

[98]

Total: 330 marks

Worksheet: Term 4 Revision

Name: _____ Class: _____

Question 1

- 1 Prepare a Trial Balance for M&J Garden Services on 30 June 2012. (14)
- 2 Enter the transactions for July 2012 in the subsidiary journals: Cash Receipts Journal: analysis of receipts, bank, fee income and sundry accounts. Cash Payments Journal: bank, wages, stationery and sundry accounts. Note: close off the journals at the end of the month. (Use the template on page 62 for both journals.) (33)

Information:

- 1 Balances appeared in the books of M&J Garden Services on 30 June 2012: Capital, R46 200; Vehicles, R125 600; Equipment, R3 200; Bank overdraft, R2 360; Fee income, R126 410; Stationery, R3 600; Fuel, R4 520; Repairs, R2 650; Consumable stores, R4 500; Water and electricity, R2 300; Telephone, R5 600 and wages, R23 000.
- 2 Transactions: July 20.12

Day	Transaction
1	The owner, M Mabena, increased his capital contribution to R60 000 by depositing the money into the business's current bank account. Issue receipt 004.
4	Buy equipment from Snow Enterprises with cheque 038, R2 100.
6	Pay wages with cash cheque 039, R1 800.
8	Cash received for services rendered, R6 900
13	Pay the municipality R600 for water and electricity with cheque 040.
15	Buy consumable stores from SN Suppliers with cheque 041, R340.
17	Buy stationery from Star Traders for R480 with cheque 042.
20	Cash received for services rendered, R8 250.
23	Pay wages with cash cheque 043, R1 800.
25	Pay MN motors R800 for fuel with cheque 044.
28	The owner takes business cheque 045 for personal use, R500.

Worksheet: Exemplar end-of-year examination

Name: _____ Class: _____

SECTION A

Question 1

Choose the correct option for each question.

- 1.1 A close corporation has between ...
- A. 1 and 50 owners.
 - B. 1 and 10 owners.
 - C. 2 and 20 owners.
 - D. 7 owners and is only limited by the number of shares issued.
- 1.2 Owner deposits money in the bank to increase capital.
- A. Assets +; Liabilities +; Owner's Equity +
 - B. Assets -; Liabilities +; Owner's Equity 0
 - C. Assets -; Liabilities 0; Owner's Equity +
 - D. Assets -; Liabilities -; Owner's Equity +
- 1.3 Factors of production are:
- A. Capital, Entrepreneurship, Legal, Labour
 - B. Capital, Entrepreneurship, Land, Labour
 - C. Capital, Enterprise, Land, Labour
 - D. Capital, Enterprise, Legal, Labour
- 1.4 The ... is used to calculate the profit or loss in a business.
- A. Income Statement
 - B. Balance Sheet
 - C. Trial Balance
 - D. General Ledger
- 1.5 Definition of economic growth:
- A. When a country produces more goods and services.
 - B. When a country increases wages.
 - C. When a country purchases more goods and services.
 - D. When a country improves their standard of living.
- 1.1 1.2 1.3 1.4 1.5 [10]

Question 2

Say whether the following statements are true or false.

		TRUE	FALSE	
2.1	A cheque is used to record transactions in the Cash Payments Journal.			(2)
2.2	Personal property tax is an example of indirect tax.			(2)
2.3	Employment of a factory supervisor is part of the factor market.			(2)
2.4	A duplicate receipt is used to record receipts in the Cash Receipts Journal.			(2)
2.5	A company secretary working in Johannesburg is part of a self-sufficient society.			(2)

[10]

Question 3

From the words in italics, underline the word that makes the sentence correct.

- 3.1 South Africa has *three/four* levels of government. (2)
- 3.2 An example of Non-current Assets is *vehicles/bank*. (2)
- 3.3 An Income Statement is drawn up for a *specific period/on a specific day*. (2)
- 3.4 Personal and business income tax is part of *direct/indirect* taxation. (2)
- 3.5 The General Ledger is balanced/*totalled* at the end of every *day/month*. (2)

[10]

Question 4

Identify the form of business ownership from the list below.

Close corporation, Partnership, Private company, Private company with personal liability, Public company, Sole trader

- 4.1 Pick n Pay Ltd
..... (2)
- 4.2 Tile Manufacturers (Pty) Ltd.
..... (2)
- 4.3 Vorster, Becker & Associates in Law
..... (2)

4.4 Anthea's Hairdressers (2)
.....

4.5 Bailey Shoe Factory CC (2)
.....

[10]

[Total for Section A: 40]

SECTION B: THE ECONOMY

Question 5

Look at the graph on page 171 of the Learner's Book and answer the questions that follow.

5.1 Name ONE form of taxes which serve as income for government. (1)
.....

5.2 Which department has the largest amount allocated to it? Do you agree with this allocation? Give reasons for your answer. (5)
.....
.....
.....
.....
.....

5.3 Government provides social grants in order to support those citizens who are unable to support themselves. It has been suggested that unemployed youth are given a monthly allowance.

5.3.1 Explain the term 'social grants'. (4)
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.....
.....

5.3.2 Do you agree with the allowances for unemployed youth? Give reasons for your answer.
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(4)

[14]

Question 6

6.1 Compare a rural and modern society.

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(8)

6.2 Some statistics say that 72% of the unemployed are between the ages of 15 and 34 years old. Comment on this statement explaining unemployment.

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(8)

[16]

[Total for Section B: 30]

SECTION C: FINANCIAL LITERACY

Question 7

Sally and Julie own Alpha Printers. Use the information below to answer the questions.

Information:

- a) The owner decided to start his business on 1 July 2001 by depositing R90 000 into our current bank account.
- b) We bought the following assets during the year:
 - Motorcycle for deliveries, R12 000.
 - Printing machines for our printing business, R17 000.
 - Furniture for our reception area, R3 000.
 - Computer for the owner's son, R4 400.
 - A building in which we can operate, R30 000.
- c) We received the following money from customers and our tenant:
 - We did 200 printing jobs at R300 each and 10 further jobs at R400 each.
 - We rented part of our building to a tenant for R4 000 per month.
- d) We paid the following expenses for the year:
 - Water and electricity, R1 600
 - Telephone, R12 600 (R2 600 of this was for the owner)
 - Material costs, R14 400
 - We paid R2 000 rent per month for an office we had to rent in another town.
 - J. Thomas, one of our workers, earns R6 000 a month as a salary.
 - We paid our workers R500 per week for wages.

7.1 Give TWO examples of each of the following:

7.1.1 Current assets

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

7.1.2 Liabilities

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

Question 8

Record the following transactions of Glenda's Gardening for July 2012 in the following journals:

- 8.1 Cash Receipts Journal (14)
8.2 Cash Payments Journal (9)
(Use the template on page 62 for both journals.)

Note: Last cheque used in June was Cheque 52 and the last receipt issued was Receipt 35.
Do not total journals.

Transactions for July 2012:

- 1 Cleaned the gardens of three small houses at R250 per house.
Received the rent for the month from John Bates. He is renting part of a storeroom from Glenda's Gardening and pays R24 000 p.a.
- 2 Bought a new lawnmower from Frank Farming Supplies for R5 600.
- 5 Issued a cheque to Paper Partner for receipt books, pens and pencils, R118.
- 10 Completed gardening work for customers, R2 250.
- 14 Paid wages for the last two weeks. The business employs six workers, who each earn R110 per day worked.
- 18 Glenda, the owner, increased her capital contribution with R40 000 by depositing the money directly into the bank account of the business.
- 21 Received R850 from Jeremy Scott who bought three old hedge-cutters from Glenda's Gardening.
- 24 Paid Telkom R1 120 for the telephone account. R720 was for the owner's personal account and the remainder for the account of the business.

[Total for Section C: 50]

SECTION D: ENTREPRENEURSHIP

Question 9

Penny is a skilled and experienced businesswoman. She worked as a manager in a retail store, SaveMart, for ten years, and then went on to be the financial director at Collins & Sons, a law firm, for the past eight years. She decided she needed a change in her life and moved to Johannesburg where she got a job at SMART BUY, a private company with branches across the country. Due to her many years of experience and her good management skills, she has been appointed CEO.

9.1 What level of management would Penny form part of? Give a reason for your answer.

.....
.....

(2)

9.2 Penny is an autocratic leader. A number of employees have complained and do not want to work under her. Comment on this situation and give suggestions on how she can improve her relationship with the employees.

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(10)

[12]

Question 10

10.1 State TWO reasons why entrepreneurs are important to an economy.

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.....

(2)

10.2 Explain the difference between skilled, semi-skilled labour and the influence they would have on the productivity of a business.

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

(4)

10.3 Identify FOUR things controlled by the Basic Conditions of Employment Act.

(4)

10.4 SMART BUY has been growing and the owners are considering changing to a public company. Advise them on the disadvantages of this decision.

(8)

[18]

[Total for Section D: 30]

Total: 150 mark

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
Entrepreneur One	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?	
Entrepreneur Two	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	
Entrepreneur Three	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	
Pictures			Has included three or more relevant pictures	Has included one or two relevant pictures	Pictures are included but they are decorative	
Presentation				Work is neatly presented and an accurate reflection of learners ability	Work is neat but needed some refinement	
Total						____ / 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.

Unit Checklist			
	Yes 2	Partially 1	No 0
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			
Total	_____ / 10		

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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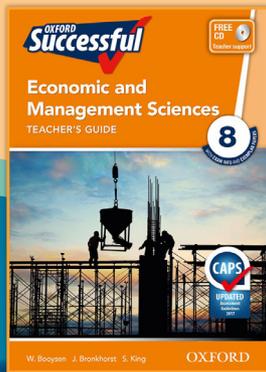
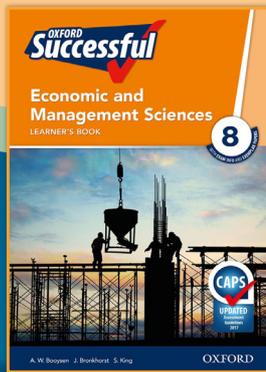
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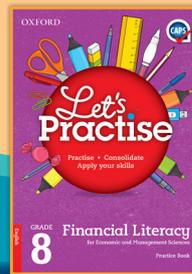
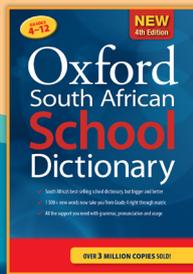
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