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AIDS HELPLINE: 0800-0123-22 Prevention is the cure

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GENERAL NOTICES

NOTICE 1717 OF 2002

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

Generic Management

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standards upon which qualifications are based. The unit standards can be accessed via the SAQA web-site at www.saqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the unit standards should reach SAQA at the address *below and no later than 13 October 2002*. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing

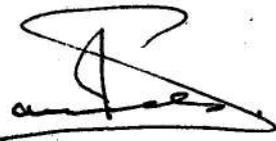
Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 482 0907



PP SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

UNIT STANDARDS AT NQF LEVEL 3

1. TITLE: Contribute to staff member selection

LEVEL: 3

CREDITS: 2

Specific Outcome 1: Prepare for the selection process

Specific Outcome 2: Participate in the process

Specific Outcome 3: Make a recommendation

2. TITLE: Develop and manage a personal strategic life plan

LEVEL: 3

CREDITS: 5

Specific Outcome 1: Develop statements of personal vision, goals and objectives

Range: The statements can be formal or informal.
Specific Outcome 2: Develop an action plan

Specific Outcome 3: Implement and amend the action plan

3. TITLE: Manage use of own time

LEVEL: 3

CREDITS: 5

Specific Outcome 1: Plan own use of daily time

Specific Outcome 2: Manage use of own time

Specific Outcome 3: Make improvements to time planning

4. TITLE: Participate in meetings

LEVEL: 3

CREDITS: 5

Specific Outcome 1: Prepare for the meeting

Specific Outcome 2: Contribute to meeting discussion

Specific Outcome 3: Execute post-meeting activities

5. TITLE: Plan own activities

LEVEL: 3

CREDITS: 5

Specific Outcome 1: Analyse and prioritise tasks

Specific Outcome 2: Develop an action plan

Specific Outcome 3: Implement the plan

Specific Outcome 4: Report progress

6. TITLE: Receive feedback

LEVEL: 3

CREDITS: 1

Specific Outcome 1: Prepare oneself for the feedback

Specific Outcome 2: Receive the feedback

Specific Outcome 2: Respond to the feedback

7. TITLE: Contribute to staff member selection

LEVEL: 3

CREDITS: 2

Specific Outcome 1: Prepare for the selection process

Specific Outcome 2: Participate in process

Specific Outcome 3: Make a recommendation

8. TITLE: Gather and report information

LEVEL: 3

CREDITS: 2

Specific Outcome 1: Gather information

Specific Outcome 2: Record information

Range: Formal systematic recording, informal recording of incidental information.

Specific Outcome 3: Report on information gathered

Range: Informal verbal report, formal written report.

9 TITLE: Give instructions

LEVEL: 3

CREDITS: 2

Specific Outcome 1: Prepare for giving the instruction

Specific Outcome 2: Give the instruction

Specific Outcome 3: Follow up on implementation of instruction

Specific Outcome 4: Give feedback

10. TITLE: Provide input assertively

LEVEL: 3

CREDITS: 5

Specific Outcome 1: Prepare to discuss a matter assertively

Specific Outcome 2: Communicate the message

Specific Outcome 3: Review own assertiveness

11. TITLE: Lead a group to complete routine tasks

LEVEL: 3**CREDITS:** 10**Specific Outcome 1:** Contract with group members**Specific Outcome 2:** Contribute to the achievement of group objectives**Specific Outcome 3:** Contribute to the motivation of group members

12. TITLE: Manage interpersonal conflict

LEVEL: 3**CREDITS:** 5**Specific Outcome 1:** Identify and evaluate the conflict situation**Specific Outcome 2:** Develop and implement an action strategy

Range: Action strategy includes but is not limited to apologising, active listening, paraphrasing, and neutral questioning and win-win negotiations.

Specific Outcome 3: Evaluate the resolution

UNIT STANDARDS AT NQF LEVEL 4

1. TITLE: Develop and implement departmental or divisional policies and procedures

LEVEL:	4
CREDITS:	10
Specific Outcome 1:	Analyse and research current policies and procedures
Specific Outcome 2:	Develop new policies and procedures
Specific Outcome 3:	Develop implementation plan
Specific Outcome 4:	Promote and roll out new policies and procedures

2. TITLE: Manage information at a functional level

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Establish information-gathering team
Specific Outcome 2:	Identify information required
Specific Outcome 3:	Evaluate solutions and make decision

3. TITLE: Prioritise use of time

LEVEL:	4
CREDITS:	6
Specific Outcome 1:	Examine one's needs for prioritising
Specific Outcome 2:	Plan use of daily, weekly and monthly time
Specific Outcome 3:	Organise oneself in relation to others
Specific Outcome 4:	Review accomplishments and re-plan accordingly

8. TITLE: Delegate activities to individuals or team members

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Identify suitable activities and individuals
Specific Outcome 2:	Delegate the activities
Specific Outcome 3:	Monitor progress
Specific Outcome 4:	Give feedback

5. TITLE: Develop action plans with teams or individuals

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Gather and analyse information
Specific Outcome 2:	Identify objectives and goals
Specific Outcome 3:	Create an action plan
Specific Outcome 4:	Monitor the implementation of the plan

6. TITLE: Manage information at a group or team level

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Establish terms of reference for the gathering of information
Specific Outcome 2:	Identify information required
Specific Outcome 3:	Develop an information flow system

7. TITLE: Network with local subject matter experts

LEVEL: 4**CREDITS:** 5**Specific Outcome 1:** Identify subject matter experts**Specific Outcome 2:** Create database of subject matter experts

Range: Database may be a formal computer database or an informal diarised database or personal telephone directory.

Specific Outcome 3: Plan and prepare for networking opportunities

Range: Networking opportunities may include face-to-face contact, telephonic conversations, attending events as a participant, a guest or delegate, social and non-social events, conferences and presentations, written correspondence, e-mail and video conferencing.

Specific Outcome 4: Participate in networking opportunities

Range: Participation in a networking opportunity refers to any event attended as a delegate or a guest.

8. TITLE: Resolve customer problems

LEVEL: 4**CREDITS:** 5**Specific Outcome 1:** Gather information about the problem**Specific Outcome 2:** Resolve the problem

9. TITLE: Contribute to the development of team members

LEVEL: 4**CREDITS:** 5**Specific Outcome 1:** Evaluate performance of team members**Specific Outcome 2:** Identify training requirements**Specific Outcome 3:** Create and maintain an environment conducive to the development of team members

10. TITLE: Manage individual's performance

LEVEL:	4
CREDITS:	10
Specific Outcome 1:	Identify performance objectives and goals
Specific Outcome 2:	Obtain commitment
Specific Outcome 3:	Monitor performance
Specific Outcome 4:	Plan and conduct the performance management interview
Specific Outcome 5:	Take remedial action

11. TITLE: Manage own division's or department's finances

LEVEL:	4
CREDITS:	10
Specific Outcome 1:	Allocate available budget
Specific Outcome 2:	Monitor expenditure
Specific Outcome 3:	Give feedback to key role players

12. TITLE: Manage own membership of a team

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Demonstrate an understanding of the purpose of the team <i>Range: The team can include but is not limited to work teams, social teams, sport teams or project teams.</i>
Specific Outcome 2:	Integrate into the team <i>Range: Integration refers to developing commitment to the team and its goals and objectives, its values and principles, its activities and outcomes.</i>

Specific Outcome 3: Participate in team activities

Range: Team activities include but are not limited to job related activities and social or sporting events.

13. TITLE: Organise individual's or team members' work activities and resources

LEVEL: 4

CREDITS: 5

Specific Outcome 1: Identify and analyse information

Specific Outcome 2: Organise activities and resources

Specific Outcome 3: Monitor activities and utilisation of resources

14. TITLE: Prioritise team members' use of time

LEVEL: 4

CREDITS: 5

Specific Outcome 1: Prioritise use of time

Specific Outcome 2: Manage the team's use of time

Specific Outcome 3: Review accomplishments and re-plan accordingly

15. TITLE: Present ideas and information in a predictable situation

LEVEL: 4

CREDITS: 5

Specific Outcome 1: Prepare the presentation

Specific Outcome 2: Deliver the presentation

Specific Outcome 3: Review the presentation

16. TITLE: Provide feedback

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Plan and prepare to give feedback
Specific Outcome 2:	Provide feedback

17. TITLE: Solve basic problems

LEVEL:	4
CREDITS:	10
Specific Outcome 1:	Define and analyse the problem
Specific Outcome 2:	Identify possible solutions
Specific Outcome 3:	Implement solution

18. TITLE: Contribute to the development of team members

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Evaluate performance of team members
Specific Outcome 2:	Identify training requirements
Specific Outcome 3:	Create and maintain an environment conducive to co-operation

19. TITLE: Contribute to the compilation of the cash budget

LEVEL:	4
CREDITS:	5
Specific Outcome 1:	Obtain scope of information needed
Specific Outcome 2:	Gather and validate information
Specific Outcome 3:	Present budget information

20. TITLE: Control individuals' or team member's activities

LEVEL: 4**CREDITS:** 5**Specific Outcome 1:** Identify control requirements for the group or team**Specific Outcome 2:** Contract control measures with individuals and the team**Specific Outcome 3:** Implement the control measures

UNIT STANDARDS AT NQF LEVEL 5

1. TITLE: Compile budget for own division or department

LEVEL: 5

CREDITS: 10

Specific Outcome 1: Obtain budget directives and determine operational scope

Specific Outcome 2: Compile draft budget

Specific Outcome 3: Finalise the budget

2. TITLE: Contribute to formulation of a business plan

LEVEL: 5

CREDITS: 2

Specific Outcome 1: Identify and analyse own objectives and resources required

Specific Outcome 2: Conduct gap analysis

Specific Outcome 3: Report on resources required

3. TITLE: Control a division's activities

LEVEL: 5

CREDITS: 10

Specific Outcome 1: Identify quality control requirements of the division

Specific Outcome 2: Contract control measures with team leaders

Specific Outcome 3: Implement the control measures

4. TITLE: Develop a divisional vision, mission and strategy

LEVEL:	5
CREDITS:	20
Specific Outcome 1:	Identify and analyse factors contributing to business purpose, direction and values
Specific Outcome 2:	Develop the vision and strategy
Specific Outcome 3:	Develop implementation plan
Specific Outcome 4:	Communicate and promote vision and strategy

5. TITLE: Develop operational plans for a division

LEVEL:	5
CREDITS:	10
Specific Outcome 1:	Gather and analyse information
Specific Outcome 2:	Identify objectives and goals
Specific Outcome 3:	Create an action plan
Specific Outcome 4:	Monitor the implementation of the plan

6. TITLE: Lead a complex team

LEVEL:	5
CREDITS:	15
Specific Outcome 1:	Develop a team vision
Specific Outcome 2:	Gather information
Specific Outcome 3:	Communicate with team members
Specific Outcome 4:	Develop a team action plan
Specific Outcome 5:	Lead the team
Specific Outcome 6:	Measure performance against action plan
Specific Outcome 7:	Improve team's performance

7. Title Managing conflict in and amongst groups and teams

LEVEL: 5

CREDITS: 5

Specific Outcome 1: Monitor and diagnose actual or potential conflict situations

Specific Outcome 2: Identify and clarify areas of conflict

Range: Conflict may include but is not limited to differences of opinion, personal animosity, expression of sexism, racism, inappropriate modulation and use of language, non-compliance with organisational, team norms and values.

Specific Outcome 3: Develop an action strategy

Range: Strategies include but are not limited to active listening, neutral questioning, win-win negotiations, option generation, mutual problem definition, role reversal, collaborative problem solving, joint solution design.

Specific Outcome 4: Implement action strategy

Specific Outcome 5: Evaluate the resolution

8. TITLE: Solve complex problems

LEVEL: 5

CREDITS: 10

Specific Outcome 1: Define and analyse the problem

Specific Outcome 2: Generate solutions

Specific Outcome 3: Evaluate solutions and make decision

Specific Outcome 4: Implement solution

9. TITLE: Conduct inter-divisional meetings

LEVEL:	5
CREDITS:	5
Specific Outcome 1:	Undertake preliminary preparation
Specific Outcome 2:	Prepare for the meeting
Specific Outcome 3:	Conduct the meeting
Specific Outcome 4:	Lead the post meeting follow-up
Specific Outcome 5:	Improve the quality of meetings

10. TITLE: Manage individual's and team's performance

LEVEL:	5
CREDITS:	15
Specific Outcome 1:	Identify performance objectives and goals
Specific Outcome 2:	Obtain commitment
Specific Outcome 3:	Monitor performance
Specific Outcome 4:	Plan and conduct the performance management interview
Specific Outcome 5:	Take remedial action
Specific Outcome 6:	Review own performance

11. TITLE: Contribute to the marketing of the team, function or department

LEVEL:	5
CREDITS:	10
Specific Outcome 1:	Demonstrate an understanding of the team's business

Range: Business refers to, but is not limited to products, services, challenges, competitors, history, suppliers, key customers, opportunities and threats.

- Specific Outcome 2:** Represent the team at events
- Range: Events include but are not limited to attending formal, informal social events, internal and external events, seminars, forums, conferences, marketing and non-marketing events.*
- Specific Outcome 3:** Establish and maintain customer relationships
- Range: Internal or external customers.*
- Specific Outcome 4:** Contribute to the identification of new or improved business opportunities
- Specific Outcome 5:** Contribute to deal closing

12. TITLE: Contribute towards the formulation of a business strategy

- LEVEL:** 5
- CREDITS:** 8
- Specific Outcome 1:** Research and summarise information in the field of one's own area of expertise
- Specific Outcome 2:** Submit reports to those responsible for developing the strategy of the organisation or business unit
- Specific Outcome 3:** Prepare to give a presentation in support of the findings

13. TITLE: Manage own division's assets

- LEVEL:** 5
- CREDITS:** 5
- Specific Outcome 1:** Develop systems to manage assets
- Specific Outcome 2:** Control the assets
- Specific Outcome 3:** Monitor and evaluate asset usage

14. TITLE: Select new team members

LEVEL:	5
CREDITS:	5
Specific Outcome 1:	Develop team member selection criteria
Specific Outcome 2:	Assess the candidate
Specific Outcome 3:	Select the candidate

15. TITLE: Contribute to the marketing of the team, function or department

LEVEL:	5
CREDITS:	10
Specific Outcome 1:	Demonstrate an understanding of the team's business <i>Range: Business refers to but is not limited to team's products, services, challenges, competitors, history, suppliers, key customers, opportunities and threats.</i>
Specific Outcome 2:	Represent the team at events <i>Range: Events include but are not limited to attending formal, informal social events, internal and external events, seminars, forums, conferences, marketing and non-marketing events.</i>
Specific Outcome 3:	Establish and maintain customer relationships <i>Range: Internal and external customers.</i>
Specific Outcome 4:	Contribute to the identification of new or improved business opportunities
Specific Outcome 5:	Contribute to the closing of the deal with the customer

UNIT STANDARDS AT NQF LEVEL 6

1. TITLE: Contribute to the marketing of the organisation

LEVEL: 6

CREDITS: 10

Specific Outcome 1: Demonstrate an understanding of the business

Range: Business refers to but is not limited to: Organisation's products, services, challenges, competitors, history, suppliers, key customers, opportunities and threats.

Specific Outcome 2: Represent the organisation at events

Range: Events include but are not limited to attending formal or informal social events, internal and external events, seminars, forums, conferences, marketing and other events.

Specific Outcome 3: Establish and maintain customer relationships

Range: Internal and external customers.

Specific Outcome 4: Contribute to the identification of new or improved business opportunities

Specific Outcome 5: Contribute to the closing of the deal with the customer

2. TITLE: Create and enhance working relationships

LEVEL: 6

CREDITS: 5

Specific Outcome 1: Develop a team vision

Range: The analysis includes the physical, social and personal context.

Specific Outcome 2: Develop a plan to create and enhance working relationships

Specific Outcome 3: Implement the plan

Specific Outcome 4: Review the quality of the working relationships

3. TITLE: Develop and initiate a system to control quality within the organisation

LEVEL:	6
CREDITS:	10
Specific Outcome 1:	Identify quality control requirements of the organisation
Specific Outcome 2:	Evaluate current quality control system
Specific Outcome 3:	Develop a quality control system
Specific outcome 4:	Develop the initiation and implementation strategy
Specific outcome 5:	Promote and roll out the quality control system

4. TITLE: Develop and initiate a system to improve customer satisfaction

LEVEL:	6
CREDIT:	8
Specific outcome 1:	Analyse and define the existing situation and identify opportunities and goals
Specific outcome 2:	Design a system and the initiation and implementation strategy
Specific outcome 3:	Develop the initiation and implementation strategy
Specific outcome 4:	Pilot, evaluate and revise the system
Specific outcome 5:	Promote and initiate the system

5. TITLE: Establish and maintain customer relationships

LEVEL:	6
CREDITS:	10
Specific Outcome 1:	Identify and gather information about customers
Specific Outcome 2:	Establish relationship with customer
Specific Outcome 3:	Create and maintain a culture that ensures high levels of customer satisfaction

6. TITLE: Lead a multi-disciplinary team

LEVEL:	6
CREDITS:	15
Specific Outcome 1:	Develop a team vision
Specific Outcome 2:	Gather information
Specific Outcome 3:	Communicate with divisional leaders
Specific Outcome 4:	Develop an action plan
Specific Outcome 5:	Lead divisional leaders
Specific Outcome 6:	Measure performance against action plan
Specific Outcome 7:	Improve team's performance

7. TITLE: Network with international subject matter experts

LEVEL:	6
CREDITS:	5
Specific Outcome 1:	Develop a team vision
Specific Outcome 2:	Gather information
Specific Outcome 3:	Communicate with divisional leaders
Specific Outcome 4:	Develop an action plan
Specific Outcome 5:	Lead divisional leaders
Specific Outcome 6:	Measure performance against action plan
Specific Outcome 7:	Improve team's performance

8. TITLE: Prepare and deliver a presentation at a seminar

LEVEL:	6
CREDITS:	5
Specific Outcome 1:	Plan the presentation
Specific Outcome 2:	Prepare for the presentation
Specific Outcome 3:	Deliver the presentation
Specific Outcome 4:	Review the presentation

9. TITLE: Solve complex and strategic problems

LEVEL:	6
CREDITS:	15
Specific Outcome 1:	Analyse and define the problem
Specific Outcome 2:	Decide and implement a problem solving and decision making style
Specific Outcome 3:	Ensure that action steps are implemented
Specific Outcome 4:	Generate solutions
Specific Outcome 5:	Evaluate alternative solutions and make decision
Specific Outcome 6:	Implement solution

10. TITLE: Create and maintain a climate promoting self-motivated behaviour

LEVEL:	6
CREDITS:	15
Specific Outcome 1:	Gather and analyse information <i>Range: The analysis includes the physical, social & personal context.</i>
Specific Outcome 2:	Develop a plan to create and maintain a climate that promotes self-motivated behaviour
Specific Outcome 3:	Implement the plan
Specific Outcome 4:	Review the climate

11. TITLE: Develop a business vision and strategy

LEVEL:	6
CREDITS:	20
Specific Outcome 1:	Identify and analyse factors contributing to business purpose, direction and values
Specific Outcome 2:	Develop the vision and strategy
Specific Outcome 3:	Develop implementation plan
Specific Outcome 4:	Communicate and promote vision and strategy

12. TITLE: Develop and implement organisational policies and procedures

LEVEL:	6
CREDITS:	10
Specific Outcome 1:	Analyse and research current policies and procedures
Specific Outcome 2:	Develop new policies and procedures
Specific Outcome 3:	Develop implementation plan
Specific Outcome 4:	Promote and roll out new policies and procedures

NOTICE 1718 OF 2002**PUBLIC NOTICE BY NSB 04, COMMUNICATION STUDIES AND LANGUAGE TO
EXTEND THE BRIEF OF THE SGB FOR AUDIO VISUAL PRODUCTION**

National Standards Body (NSB 04) Communication Studies and Language hereby wishes to extend the brief of the existing SGB in the field of Film, Television, Radio, Video and New Media to include qualifications at levels 5 – 6. The original brief provided for the development of qualifications at level 2 - 4 in the field of Audio Visual Production.

BRIEF OF THE SGB

1. Develop learning pathways for potential qualifications and standards form NQF Level 4 to 6 *Regulation 24(1)(a)*.
2. Generate qualifications and standards in accordance with SAQA requirements for NQF Levels 4 to 6 *[Regulation 24(1)(a)]*.
 - National Certificate in Television Technical Operations (Level 4)
 - National Diploma in Television Technical Operations (Level 5)
 - National Certificate in Film Production (Level 4)
 - National Diploma in Film Production (Level 5)
 - National Diploma in Television Production (Level 5)
 - National Diploma in Radio Production (Level 5)
 - National Higher Diploma in Radio Production (Level 6)
 - National Diploma in Radio Station Management (Level 5)
 - National Higher Diploma in Station Management (Level 6)
 - National Certificate in Multi Media Production (Level 4)
 - National Diploma in Multi Media Production (Level 5)
3. Recommend criteria for the registration of assessors and moderators or moderating bodies *[Regulation 24(1)(d)]*.
4. Recommend the qualifications generated under 2 above to the NSB *[Regulation 24(1)(d)]*.
5. Review these qualifications and standards and effect the necessary changes *[Regulation 24(1)(b)]*.
5. Perform such other tasks as may from time to time be assigned by NSB 04 *[Regulation 24(1)(e)]*.

COMPOSITION OF THE SGB

NOMINEE	WORKPLACE	NOMINATED BODY	EXPERIENCE AND QUALIFICATION IN THE FIELD
Adams, S	Media and Training Center for Health	Media and Training Center for Health	Diploma in Adult Education, Training and Development, extensive experience in radio journalism and production.
Beckman, U	Bedon TV	SASC	Extensive experience in Film and Television Productions.
Bonmariage, G	National Film and Video Association (NFVF)	National Film and Video Association (NFVF)	Extensive experience in Film production and management Internationally and locally and producer training.
Burnett, P	Durban Institute of Technology	Training Providers	Lecturer in Video Technology.
Clarke, A M	Head Of Lighting Design: MNET	MNET	Worked at SABC as lighting design specialist, Supervisor & Manager. Picture Quality Consultant & Studio consultant for 24 years.
Clay, P A	Johnic Publishing	Johnic Publishing	21 yrs in radio as reporter, producer, presenter, start-up manager, consultant, production manager.
Danhausser, P	WITS School of Arts	WITS School of Arts	Diploma in Journalism 18yrs in live and pre-packaged programs on film & video, and single camera.
Dickinson, C	Jacaranda FM	Jacaranda FM	Experience in Radio Production and Radio training.
Doherty, C	WITS School of Arts	WITS School of Arts	Is trained in TV production at SABC. Is Director of the new Media Lab at Rhodes and Head of Digital Multi Media at WITS University.
Ebrahim, H	MEDUNSA	Professional Photographers of South Africa	Worked extensively in professional medical photography.
Engelbrecht, A C	South African Broadcast Cooperation (SABC)	South African Broadcast Cooperation (SABC)	32 yrs experience in radio & television. SDF for the SABC. Trained extensively in television operations.

Games, M	Independent Film and Television Producer	Independent Producers Organisation	18 Years of producing Film Features and Television Series.
Human, F	Technikon Pretoria (Film School)	Technikon Pretoria	Holds a National Certificate in Film Production, a National Diploma in Film Production, a National Higher Diploma in Film.
Jamal, S	Bush Radio	National Community Radio Forum (NCRF)	Experience in Radio Productions and Radio Training.
La Trobe, V	Commercial Producers Association Of South Africa.	Cape Film Commission	Extensive experience in the field of Producing Commercials.
Merrit, A	Concept Interactive	DIMA	Experienced in marketing and course development within the new media, print and web.
Ntshangase, J.	Institute for the Advancement of Journalism	Institute for the Advancement of Journalism	BA, BA Hons in Cultural & Media Studies.
Pretorius, P	Randse Afrikaanse Universiteit (RAU)	Randse Afrikaanse Universiteit (RAU)	Lecture in Television production.
Putter, P	Independent Producers Organisation (IPO)	Independent Producers Organisation (IPO)	Film and Television producer.
Setzen, H	Managing Director For Hot Shots Crew	Hot Shots	BA in Fine Arts, Higher Diploma in Education, Licentiate in Drama Teaching.
Singh, S	NEMISA	NEMISA	Lecturer in Television and film production.
Thomas, H	Consultant at Busvannah Communications	African Positioning Systems	Holds a BA in Economics & Politics Has extensive hands on knowledge of production in film, broadcast, corporate, audio, animation, graphics & business practices.
Tilley, N	Independent Producers Organisation (IPO)	Independent Producers Organisation (IPO)	Extensive experience in Production and commercials.
Uys, P G	Lecture In Directing At Cinema & TV School At Technikon Pretoria	Technikon Pretoria	Holds a BA in Communications and NHD in Film Production.

NOTICE 1719 OF 2002**PUBLIC NOTICE BY NSB 05, EDUCATION, TRAINING AND DEVELOPMENT, TO ESTABLISH AND REGISTER A STANDARDS GENERATING BODY FOR EDUCATION MANAGEMENT WITH A FOCUS ON SCHOOLING**

National Standards Body 05, Education, Training and Development, wishes to establish and register a Standards Generating Body for Education Management with a focus on Schooling.

The educators that will be targeted for the qualifications and standards developed by this SGB will be school management teams (heads of department, principals and deputy principals) as well as departmental officials. Qualifications and unit standards will be developed in domains such as: Managing the curriculum, Leading and managing people, Administrative skills, Finance and resource management, Management of fundraising, Personal and interpersonal development, Strategic and school development planning, Managing change, Managing an effective school, Accountability and information management, Managing and implementing education policy, Working with the community and promoting school community development.

PROPOSED BRIEF OF THE SGB

1. Collate the various qualifications that have been developed in the Schooling sub-field to identify the core competencies embedded within them [Regulation 24(1)(e)].
2. Design learning pathways for Education Management and Leadership with a focus on schooling within the learning pathways for the ETD field [Regulation 24(1)(e)].
3. Generate the following qualifications for educators with reference to the domains described above:
 - Advanced Certificate in Education Management and Leadership (Level 6)
 - Bachelor of Education (Honours) in Education Management and Leadership (Level 7)
 - Master of Education in Education Management and Leadership (Level 8)
 - Doctor of Education in Education Management and Leadership (Level 8 +)
 - Generate unit standards that could be used for continuing professional development of school management teams and departmental officials. [Regulation 24(1)(a)].
4. Recommend the qualifications and unit standards generated in 3 above to the NSB [Regulation 24(1)(c)].
5. Recommend criteria for the registration of assessors and moderators or moderating bodies [Regulation 24(1)(d)].
6. Review these qualifications and standards and effect the necessary changes [Regulation 24 (1)(b)].
7. Perform such other tasks as may from time to time be assigned by the NSB [Regulation 24(1)(e)].

PROPOSED COMPOSITION OF THE SGB

Nominee	Workplace	Nominating Body	Experience/Qualifications
Allers A	Diaz Primary School	Diaz Primary School	Head of Dept, M Ed (Education Management)
Cele N	KZN Dept of Education	KZN Dept of Education	Chief Education Specialist, B Ed, FDE
Duxbury D	JBD Education Consultancy	JBD Education Consultancy	Consultant, M Ed
Gasant M	Western Cape Dept of Education	Western Cape Dept of Education	Skills Development Facilitator, B Tech (Education Management)
Landey V	Cape Technikon	Cape Technikon	Head of Wellington Campus, M Ed
Lelliott A	Wits University	Wits University	Deputy Dean, M Sc.
Makiva V	Inkazimulo Primary School	Inkazimulo Primary School	Head of Department, B A
Mathibe I	University of North- West	University of North- West	Senior Lecturer, M Ed
Mashabela S	Limpopo Dept of Education	Limpopo Dept of Education	Education Specialist, M Ed
Mestry R	Rand Afrikaans University	Rand Afrikaans University	Senior Lecturer, D Ed
Mkhize T	KZN Dept of Education	KZN Dept of Education	Superintendent of Education Management, M Ed
Modise E	ETDP SETA	ETDP SETA	Learnerships and Skills Programmes Advisor ETDP SETA, BMP; HRMP; ADHRM
Moreosele D	North- West Dept of Education	North- West Dept of Education	Chief Education Specialist, B A (Hons)
Muniff G	Swanvale Primary School	Swanvale Primary School	Principal, B Comm, Diploma in Public Administration
Naidu A	Gauteng Dept of Education	Gauteng Institute for Management and Governance Development	Project Manager: Organisation and Governance, M Ed (Education Management)
Ndaki J	Tamara Primary School	Tamara Primary School	Principal, B A
Ramatswana P	National Dept of Education	National Dept of Education	Chief Education Specialist B.A, B Ed and Masters Diploma HRM.
Roberts O	Self Employed	Owen Roberts Consultancy	Consultant in Education Management, B A, FDE

Sehlabelo S	Gauteng Dept of Education	Gauteng Dept of Education	Institutional Development and Support Officer, B A (Hons)
Sibiya L	Mpumalanga Dept of Education	Mpumalanga Dept of Education	Deputy Chief Education Specialist, M Ed
Singh P	VISTA University	VISTA University	Professor in Postgraduate Education, D Ed
Stephens H	Penreach College	Penreach College	Director, B Ed (Hons)
Sullivan P	Management of Schools Training Programme	Management of Schools Training Programme	Consultant Director, Master of Management in Human Resources
Thurlow M	University of Natal	University of Natal	Professor in Education, PhD
Van Der Mescht H	Rhodes University	Rhodes University	Professor and Head of Dept, PhD

NOTICE 1720 OF 2002**PUBLIC NOTICE BY NSB 05, EDUCATION, TRAINING AND DEVELOPMENT TO EXTEND THE BRIEF OF THE STANDARDS GENERATING BODY FOR ASSESSOR STANDARDS TO GENERATE ADDITIONAL ASSESSOR STANDARDS**

National Standards Body 05- Education, Training and Development- hereby extends the brief of the Standards Generating Body for Assessor Standards to generate additional standards comprising of generic competencies required for the practice of assessment across the twelve organizing fields of the National Qualifications Framework.

EXTENSION OF THE BRIEF

1. Collate the various assessor standards that have been developed across the twelve organizing fields to identify the generic competencies embedded within them.
2. Investigate the appropriate NQF levels at which the additional assessor standards might be generated.
3. Generate standards for assessors at the appropriate NQF levels, as in 2 above, with reference to the core competencies embedded within the assessor standards in 1 above, and based upon the additional knowledge of best practice in assessment which the SGB brings to the task. [*Regulation 24 (1)(a)*].

These standards will be:

- **Facilitate the Preparation and Presentation of Evidence by Candidates- NQF Level 4**
- **Evaluate Education and Training Providers- NQF Level 6**
- **Develop and Promote RPL Practices- NQF Level 6**

4. Recommend the standards generated under 3 above to the National Standards Body [*Regulation 24 (1)(c)*].
5. Recommend the criteria for the registration of assessors and moderators or moderating bodies [*Regulation 24 (1)(d)*].
6. Review these standards and effect the necessary changes [*Regulation 24 (1)(b)*].
7. Maintain liaison with other related Standards Generating Bodies in the field [*Regulation 24 (1)(e)*].
8. Perform such functions as may from time to time be delegated by the NSB [*Regulation 24 (1)(e)*].

COMPOSITION OF THE SGB

Nominee	Workplace	Nominating Body	Experience/Qualifications
Berkhout S	University of Stellenbosch	FEDUSA	D Ed, Professor in Education
Borain K	Southern Sun Group	Southern Sun	Diploma: Personnel Management and Training, Development Manager
Corneilse M	Wingfield Technical College	Wingfield Technical College	B A; HDE, Lecturer
Els R	Greater Johannesburg Municipal Council	Johannesburg Municipal Council	M Sc, Assessor: Human Resources
Gallie M	South African Council for Educators	South African Democratic Teachers Union	M Ed, Director: Human Resources and Administration
Hallendorf E	The Learning Network	The Learning Network	B Sc; HDE, Director of Education and Training Consultancies
Lotz J	Dept of Education	Dept of Education	D Phil, Deputy Chief Education Specialist
Machard D	ETDP SETA	ETDP SETA	B.A. Sec. Ed; M Ed, Adult Education and Training; ETQA Manager.
Mafanga S	Dept of Education	Dept of Education	M Ed, Deputy Education Specialist
Moore A	Project Literacy	Project Literacy	PhD, Senior Research Specialist
Noordien F	Glendale Secondary School	SADTU	M Ed, Teacher
Olivier C	Dept of Labour	Dept of Labour	D Ed, Chief Labour Training Advisor
Pahad M	Independent Consultant	Independent Examinations Board	M Ed, Quality Assurance Manager
Pailman K	Human Capital Systems	Vista University	D Ed, Chief Executive Officer
Powell P	Technikon Natal	CTP	M Ed, Curriculum Development Facilitator
Rault-Smith J	Western Cape Education Dept	Dept of Education	B Ed, Director: Curriculum Development
Steyn A	Goldfields Training Services	BSA	ETD Practitioner, RPL Advisor; Vocational Advisor and Internal Verifier
Sutherland L	University of Zululand	University of Zululand	M Ed, Assessment and Evaluation Specialist
Taylor L	ESKOM	BSA	M A, Corporate Assessment and Recruitment Manager

Van Rooyen M	Assessment College of SA	Alliance of Private Providers of Education, Training and Development	B Ed, Executive Director
Willard S	South African Revenue Services	MERSETA	B A; HIDE, Operations Manager

NOTICE 1721 OF 2002
SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

Funeral Services

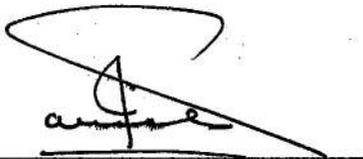
Registered by NSB 11, Services, publishes the following qualifications and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards upon which qualifications are based. The full qualification and unit standards can be accessed via the SAQA web-site at www.saqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the unit standards should reach SAQA at the address *below and no later than 13 October 2002*. All correspondence should be marked **Standards Setting – SGB for Funeral Services** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907



78 SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**National Certificate in Funeral Services Practice - NQF Level 3**

Field:	Services
Sub-field:	Personal Care
Level:	3
Credit:	122
Issue date:	
Review date:	

Rationale for the qualification

The National Certificate in Funeral Services Practice: Level 3 is designed to meet the needs of those learners who enter the field of Funeral Services, or are already involved and now wish to pursue a career in the Funeral Service Industry. The Funeral Service Industry is an essential industry and by its very nature a constant supply of customers is ensured. This means there is a need to develop career paths in this field, and it is an industry constantly in need of skilled people.

The National Certificate in Funeral Services Practice at NQF Level 3 supports the objectives of the NQF in that it gives the learner access to the National Qualifications Framework register. It will therefore ensure that the quality of education and training is enhanced and be of a world class standard.

The National Certificate in Funeral Services Practice: NQF Level 3 allows the learner to work towards a nationally recognised qualification. The qualification will allow both those in formal education and those already employed in organisations in the funeral business access to a qualification that can be used as a benchmark to gauge their competence against local and international standards.

Purpose of the qualification

This qualification is for any individual who is or wishes to be involved in the Funeral Services Industry, will have access to this qualification. It also serves as the entry qualification into Funeral Services operations. This qualification will be registered at NQF Level 3.

A learner can complete the qualification specialising in Embalming and Restoration, Marketing and Merchandising or Disaster Management. The core unit standards are common to all three areas of specialisation. Portability across these areas of specialisation is therefore ensured.

Learners working towards this qualification will find that the acquisition of competence in the unit standards, which make up the qualification, will add value to the learner's job. This qualification is intended to enhance the provision of entry level service within the Funeral Service Industry.

The learners will be able to integrate all the selling, administrative, funeral provision and preparation of human remains knowledge and skills with those operational specifics in a given context.

The building on day-to-day specific funeral services as well as selling and providing an administrative competency, the qualification ensures progression of learning throughout their careers in this industry

It will therefore provide the broad knowledge, skills and values needed in the Funeral Services Industry and will facilitate access to, and mobility and progression within, education, training and to progress along a learning path for learners who:

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Contact Centres for many years, but have no formal qualification in Contact Centre Support.
- Wish to extend their range of skills and knowledge of the industry so that they can become competent workers in Contact Centres.

The qualification has building blocks that can be developed further and will lead to a more defined Funeral Services learning path at various NQF levels. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge, skills and values that are required in Contact Centres.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Access to the Qualification

Access to this qualification is open, therefore a learner can access the total qualification and it must be noted that learners may also access any individual unit standard and obtain the credits issued against the unit standard. Also any learner who can provide evidence of the learning assumed to be in place has open access to this qualification. No restrictions, other than the learning assumed to be in place are prescribed.

Learning assumed to be in place

Language, literacy, numeracy and communication are intrinsic to human and cognitive development and therefore central to lifelong learning. The learning assumed to be in place at this level is intended to accommodate a range of different contexts; that is, they can be demonstrated in ways that are appropriate to each individual learners needs. The learning assumed to be in place is only a guide in order to help the learner cope with attaining competence of the unit standards in the qualification.

The following is the learning assumed to be in place:

- Numeracy at NQF Level 2 or equivalent.
- Verbal and written communication at NQF Level 2 or equivalent.

Exit Level Outcomes

On achieving this qualification, the learner will be able to:

- Work with both internal and external stakeholders in a funeral business.
- Present and demonstrate funeral services and products to customers to meet their needs.
- Deal with customers in different situations including handling complaints.
- Demonstrate an understanding of basic health and safety practices when working with human remains.
- Prepare and clean human remains for different routine requirements.
- Comply with all legal and ethical issues such as a code of conduct, pertaining to the funeral service industry
- Assist with the quality preparation, transportation and conducting of funeral ceremonies
- Exhume human remains on request in accordance with legal requirements
- Comply with housekeeping and merchandising requirements
- Implement the necessary disaster management administration procedures and processes.
Range: recovery, identification and repatriation of human remains from the disaster site, multiple deaths which cannot be handled by the normal local funeral infrastructure.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The principles, methods and techniques for dealing with people, both internal and external.
- Creating the right climate for the presentation of funeral service options and products.
- The most effective way of dealing with customer complaints.
- The correct methods and techniques for complying with health, safety and ethical regulations.
- The correct procedures and processes for preparing, cleaning and embalming human remains.
- Legal, regulatory and ethical requirements for a funeral business.
- The applicable administrative systems and procedures.
- The legal and practical requirements for exhuming human remains.
- Marketing and merchandising issues in a funeral business.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against:

- The New Zealand qualifications - 'National Certificate in Embalming', National Certificate in Funeral Directing and the 'National Diploma in Funeral Directing, with a total credit value of 302 credits. The SGB also compared the unit standards in this qualification to the 21 New Zealand unit standards at levels 3, 4 and 5.
- NVQ Qualifications from Britain. The NVQs in funeral Service – Levels 2 and 3.

A direct comparison of the title, specific outcomes, assessment criteria and embedded knowledge was undertaken with each and the best practice points were highlighted and incorporated into each unit standard. However the points incorporated were written in a South African context.

Because of the difference in levels across the different countries, difficulty was found in making actual direct comparisons, level to level.

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

Learning, teaching and assessment are inextricably linked. Whenever possible, the assessment of knowledge, skills, attitudes and values shown in the unit standards should be integrated.

Assessment of the communication, language, literacy and numeracy should be conducted in conjunction with other aspects and should use authentic Funeral Services contexts wherever possible. A variety of methods must be used in assessment and tools and activities must be appropriate to the context in which the learner is working. Where it is not possible to assess the learner in the workplace or on-the-job, simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

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

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

Assessment should ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated. The assessment of the critical cross-field outcomes should be integrated with the assessment of specific outcomes and embedded knowledge.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the Recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Funeral Services Practice Qualification. Recognition of Prior Learning will be done by means of an Integrated Assessment as mentioned in the previous paragraph. Recognition of Prior Learning will be done by means of an Integrated Assessment as mentioned in the previous paragraph.

This Recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by the relevant accredited Education, Training, Quality, Assurance Body and is conducted by a registered workplace assessor.

Articulation possibilities

A learner could follow careers in:

- Funeral Administration
- Human Remains Preparation
- Funeral Insurance Sales
- Marketing and Merchandising
- Disaster Scene Preparation
- Funeral Undertakers
- Inventory and Material Handling
- Mortuary Administration
- Grave Side Attending
- Funeral Service Conductors
- Driving

Note:

The above is an indication rather than an exhaustive listing

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the relevant Education, Training, Quality, Assurance (ETQA) Body.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQA's policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- To be declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by South African Qualifications Authority (SAQA)
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

National Certificate in Funeral Services Practice - NQF Level 3

	Level 2	Credits	Level 3	Credits	Level 4	Credits	Total
Fundamental			Communication Studies and Language <ul style="list-style-type: none"> • Accommodate audience and context needs in oral communication (ID 8968) • Interpret and use information from texts (ID 8969) • Write texts for a range of communicative contexts (ID 8970) • Use language and communication in occupational learning programmes (ID 8973) Physical; mathematical, computer and life sciences <ul style="list-style-type: none"> • Identify and work with simple forms of complex numbers (ID 7455) • Work with a wide range of patterns and transformations of functions and solve related problems (ID 7457) • Use structured models to describe, represent and analyse shape and motion in 2 and 3 dimensional space (ID 7460) • Collect and use data to establish statistical and probability models and solve related problems (ID 7454) 	(20) 5 5 5 5 (18) 1 8 4 5			38
Core			<ul style="list-style-type: none"> • Build rapport with clients in a funeral business. • Provide and demonstrate funeral product and service information to individuals to enable informed decision-making. • Comply with organisation ethics. • Prepare and clean human remains for storage. • Prepare and clean human remains for visitation and coffining. • Prepare the funeral site for burial, cremation or memorial services. • Participate in conducting funeral ceremonies. • Transport human remains, the bereaved and materials and equipment. • Implement and participate in administrative procedures in a funeral business. • Exhume human remains. 	6 10 4 6 8 5 6 5 7 5	<ul style="list-style-type: none"> • Work as a team member in a funeral business • Present funeral provision options to individuals. • Handle a range of customer complaints. 	5 5 4	76

Elective Embalming and Restoration			<ul style="list-style-type: none"> • Prepare human remains for embalming. 	6	<ul style="list-style-type: none"> • Comply with legal requirements and understand implications when embalming. 	4	10
TOTAL				106		18	124
Marketing and Merchandising	<ul style="list-style-type: none"> • Maintaining housekeeping in a funeral business 	3	<ul style="list-style-type: none"> • Display and mark funeral merchandise 	5			OR 8
TOTAL		3		105		14	122
Disaster Management					<ul style="list-style-type: none"> • Gather and collate resource data and source and place disaster equipment. 	11	OR 11
TOTAL				100		25	125

**UNIT STANDARDS FOR NATIONAL CERTIFICATE IN FUNERAL SERVICES PRACTICE
NQF LEVEL 3**

UNIT STANDARDS TITLES AT NQF LEVEL 2

1. Title Maintain housekeeping in a funeral business.

UNIT STANDARDS TITLES AT NQF LEVEL 3

- *. Title Comply with organisation ethics (ID 10022)
 1. Title Build rapport with clients in a funeral business
 2. Title Provide and demonstrate funeral product and service information to individuals to enable informed decision-making
 3. Title Prepare and clean human remains for storage
 4. Title Prepare and clean human remains for visitation and coffining
 5. Title Prepare the funeral site for burial, cremation or memorial services
 6. Title Participate in conducting funeral ceremonies
 7. Title Transport human remains, the bereaved and materials and equipment
 8. Title Implement and participate in administrative procedures in a funeral business
 9. Title Exhume human remains
 10. Title Prepare human remains for embalming
 11. Title Display and mark funeral merchandise

UNIT STANDARDS TITLES AT NQF LEVEL 4

- *. Title Handle a range of customer complaints (ID 10025)
 1. Title Work as a team member in a funeral business
 2. Title Present funeral provision options to individuals
 3. Title Comply with legal requirements and understand implications when embalming
 4. Title Gather and collate resource data and source and place disaster equipment.

**UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES FOR THE NATIONAL CERTIFICATE IN
FUNERAL SERVICES PRACTICES AT NQF LEVEL 3**

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES AT NQF LEVEL 2

1. Title **Maintain housekeeping in a funeral business**
 Specific Outcome 1.1 Maintain a clean and safe funeral business
 Specific Outcome 1.2 Maintain funeral business display and work areas

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES AT NQF LEVEL 3

1. Title **Build rapport with clients in a funeral business**
 Specific Outcome 1.1 Establish a relationship and environment in which to gather or give information
 Specific Outcome 1.2 Maintain a relationship and environment with clients
 Specific Outcome 1.3 Gather information on the purpose of the visit or call

- 2. Title Provide and demonstrate funeral product and service information to individuals to enable informed decision-making**
- Specific Outcome 2.1 Identify client needs and expectations to meet client requirements
 Specific Outcome 2.2 Analyse client needs and provide solutions / options to meet client needs
 Specific Outcome 2.3 Close encounter (sale) and complete documentation and follow up procedures
 Specific Outcome 2.4 Understand product and service specifications
- 3. Title Prepare and clean human remains for storage**
- Specific Outcome 3.1 Clean the human remains physically for storage purposes
 Specific Outcome 3.2 Seal and plug orifices
- 4. Title Prepare and clean human remains for visitation and coffining**
- Specific Outcome 4.1 Dress and make the human remains presentable
 Specific Outcome 4.2 Coffin human remains for disposition
 Specific Outcome 4.3 Finish coffins for presentation purposes
- 5. Title Prepare the funeral site for burial, cremation or memorial services**
- Specific Outcome 5.1 Organise administration, materials and equipment for the preparation of the funeral site
 Specific Outcome 5.2 Confirm and check the funeral site
 Specific Outcome 5.3 Assemble materials and equipment and prepare the grave
 Specific Outcome 5.4 Organise and arrange the funeral site
- 6. Title Participate in conducting funeral ceremonies**
- Specific Outcome 6.1 Prepare for the funeral ceremony
 Specific Outcome 6.2 Assist at the funeral ceremony
 Specific Outcome 6.3 Assist with the internment of the human remains
 Specific Outcome 6.4 Assist with the delivery of the human remains
- 7. Title Transport human remains, the bereaved and materials and equipment**
- Specific Outcome 7.1 Check funeral vehicle, materials and equipment
 Specific Outcome 7.2 Transfer of human remains locally and long distance
 Specific Outcome 7.3 Transport the bereaved
- 8. Title Implement and participate in administrative procedures in a funeral business**
- Specific Outcome 8.1 Demonstrate an understanding of a funeral business

Specific Outcome	8.2	Process funeral documentation
Specific Outcome	8.3	Arrange and organise funeral logistics
9. Title		Exhume human remains
Specific Outcome	9.1	Prepare for exhumation of human remains
Specific Outcome	9.2	Remove human remains from grave according to established procedures
Specific Outcome	9.3	Pack human remains and finalise gravesites
10. Title		Prepare human remains for embalming
Specific Outcome	10.1	Prepare the embalming facility
Specific Outcome	10.2	Prepare the human remains for embalming
11. Title		Display and mark funeral merchandise
Specific Outcome	11.1	Display funeral merchandise using a range of techniques for arranging merchandise in a funeral business
Specific Outcome	11.2	Mark funeral merchandise using a range of techniques
Specific Outcome	11.3	Perform a range of housekeeping activities for maintaining quality and presentation of merchandise in a funeral business

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES AT NQF LEVEL 4

1. Title		Work as a team member in a funeral business.
Specific Outcome	1.1	Communicate with all relevant stakeholders to enhance teamwork
Specific Outcome	1.2	Report on team progress to appropriate authority and team
Specific Outcome	1.3	Display tendencies to work with others as a team member in a funeral business
Specific Outcome	1.4	Handle and resolve areas of conflict
2. Title		Present funeral provision options to individuals
Specific Outcome	2.1	Demonstrate an understanding of funeral provision
Specific Outcome	2.2	Close presentation and complete documentation and follow up procedures
3. Title		Comply with legal requirements and understand implications when embalming
Specific Outcome	3.1	Comply with legislation and rules, which regulate conduct during the embalming process
Specific Outcome	3.2	Apply the various aspects of law and statutory requirements applicable to embalming human remains

4.	Title	Gather and collate resource data and source and place disaster equipment
Specific Outcome	4.1	Gather and collate resource data for decision making purposes
Specific Outcome	4.2	Source disaster equipment and resources
Specific Outcome	4.3	Place and dismantle disaster equipment and resources on site

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**National Higher Certificate in Funeral Services Practice - NQF Level 4**

Field:	Services
Sub-field:	Personal Care
Level:	4
Credit:	121
Issue date:	
Review date:	

Rationale for the qualification

The National Higher Certificate in Funeral Services Practice: Level 4 is designed to meet the needs of those learners who are already involved in the field of Funeral Services and now wish to progress in a career in the Funeral Service Industry. The Funeral Service Industry is an essential industry and by its very nature a constant supply of customers is ensured. This means there is a need to develop career paths in this field, and it is an industry constantly in need of skilled people.

The National Higher Certificate in Funeral Services Practice at NQF Level 4 supports the objectives of the NQF in that it gives the learner access to the National Qualifications Framework register. It will therefore ensure that the quality of education and training is enhanced and be of a world class standard.

The National Certificate in Funeral Services Practice: NQF Level 4 allows the learner to work towards a nationally recognised qualification. The qualification will allow both those in formal education and those already employed in organisations in the funeral business access to a qualification that can be used as a benchmark to gauge their competence against local and international standards.

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Funeral Directors
- Funeral Administration Staff
- Funeral Service Managers
- Embalmers
- Funeral Insurance Representatives
- Human Remains Restorers

- Marketing Managers
- Undertakers
- Mortuary Cleaners
- Funeral Service Drivers
- Funeral Conductors
- Disaster Managers
- Inventory Clerks
- Mortuary Managers
- Grave Side Attendants
- Funeral Assistants

The National Certificate in Funeral Services Practice: NQF Level 4, should produce knowledgeable, skilled people who are able to contribute to improved productivity and efficiency within the Funeral Services industry. It should provide the means for current individuals in the Funeral Services field to receive recognition of prior learning and to upgrade their skills and knowledge base. The qualification is structured in such a way that it exposes individuals to a set of core competencies to give a broad understanding of Funeral Business operations and the electives, which will allow for a specialisation of competence in one of three areas, namely; Embalming and Restoration, Marketing and Merchandising and Disaster Management. It will also promote the notion of life-long learning.

Purpose of the qualification

This qualification is for any individual who is or wishes to be involved in the Funeral Services Industry. It also serves as a more advanced qualification into Funeral Service operations. This qualification will be registered at NQF Level 4.

A learner can complete the qualification specialising in Embalming and Restoration, Marketing and Merchandising or Disaster Management. The core unit standards are common to all three areas of specialisation. Portability across these areas of specialisation is therefore ensured.

Learners working towards this qualification will find that the acquisition of competence in the unit standards, which make up the qualification, will add value to the learner's job. This qualification is intended to enhance the provision of a higher level service within the Funeral Service Industry.

Learners will be able to present information to clients in difficult circumstances and ensure that the funeral provisions meet the client's needs. They will also improve their supervisory capacity and be able to conduct funeral ceremonies in a professional manner.

The learner will be able to apply the necessary knowledge and skills to ensure human remains are dealt with ethically, using competencies in this area.

It will provide the broad knowledge, skills and values needed in the Funeral Services Industry and will facilitate access to, and mobility and progression within, education, training and to progress along a learning path for learners who:

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Contact Centres for many years, but have no formal qualification in Contact Centre Support.
- Wish to extend their range of skills and knowledge of the industry so that they can become competent workers in Contact Centres.

The qualification has building blocks that can be developed further and will lead to a more defined Funeral Services learning path at various NQF levels. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge, skills and values that are required in Contact Centres.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Access to the Qualification

Access to this qualification is open, therefore a learner can access the total qualification and it must be noted that learners may also access any individual unit standard and obtain the credits issued against the unit standard. Also any learner who can provide evidence of the learning assumed to be in place has open access to this qualification. No restrictions, other than the learning assumed to be in place are prescribed.

Learning assumed to be in place

The following is the learning assumed to be in place:

- Learners accessing this qualification, will have demonstrated competency against standards in the qualification Funeral Services Practices at NQF Level 3 or equivalent

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Prepare and present more complex funeral services and products to clients and groups.
- Supervise the preparation and presentation of human remains.
- Conduct funeral ceremonies.
- Supervise the preparation of funeral sites.
- Supervise the transportation of human remains, the bereaved and funeral equipment.
- Manage funeral logistics and administration processes.
- Implement the training of funeral service personnel.
- Embalm human remains without trauma or complications.
- Manage merchandising within a funeral business.
- Implement actions associated with a disaster scene.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The techniques used to prepare and present funeral services and products to individuals and groups.
- The quality of work performed on human remains during their cleaning and presentation.

- The methods and techniques used in conducting funeral ceremonies.
- The transportation, logistics and administration procedures and processes used in a funeral business.
- The principles, methods and techniques used for the training and development of funeral service personnel.
- The procedures and processes to be used in the embalming of human remains without trauma and complications.
- The methods, techniques and organisational procedures used in the merchandising of funeral services and products
- The requirements for the setting up of a disaster scene.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against:

- The New Zealand qualifications - 'National Certificate in Embalming', National Certificate in Funeral Directing and the 'National Diploma in Funeral Directing, with a total credit value of 302 credits. The SGB also compared the unit standards in this qualification to the 21 New Zealand unit standards at levels 3, 4 and 5.
- NVQ Qualifications from Britain. The NVQs in funeral Service – Levels 2 and 3.

A direct comparison of the title, specific outcomes, assessment criteria and embedded knowledge was undertaken with each and the best practice points were highlighted and incorporated into each unit standard. However the points incorporated were written in a South African context.

Because of the difference in levels across the different countries, difficulty was found in making actual direct comparisons, level to level.

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

Learning, teaching and assessment are inextricably linked. Whenever possible, the assessment of knowledge, skills, attitudes and values shown in the unit standards should be integrated.

Assessment of the communication, language, literacy and numeracy should be conducted in conjunction with other aspects and should use authentic Funeral Services contexts wherever possible. A variety of methods must be used in assessment and tools and activities must be appropriate to the context in which the learner is working. Where it is not possible to assess the learner in the workplace or on-the-job, simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

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

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

Assessment should ensure that all specific outcomes, embedded knowledge and critical cross-field outcomes are evaluated. The assessment of the critical cross-field outcomes should be integrated with the assessment of specific outcomes and embedded knowledge.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the Recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Funeral Services Practice Qualification. Recognition of Prior Learning will be done by means of an Integrated Assessment as mentioned in the previous paragraph.

This Recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by the relevant accredited Education, Training, Quality, Assurance Body and is conducted by a registered workplace assessor.

Articulation possibilities

A learner could follow a career in:

- Funeral Administration Management
- Embalming and Restoration of human Remains
- Funeral Insurance Sales
- Funeral Insurance Sales Management
- Marketing and Merchandising Management
- Disaster Scene Supervision
- Funeral Undertakers
- Inventory and Material Handling Supervision
- Mortuary Administration Supervision
- Mortuary Management
- Funeral Service Conductors

Note:

The above is an indication rather than an exhaustive listing

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the relevant Education, Training, Quality, Assurance (ETQA) Body.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQA's policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- To be declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by South African Qualifications Authority (SAQA)
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

National Higher Certificate in Funeral Services Practice – NQF Level 4

	Level 4	Credits	Level 5	Credits	Total
Fundamental	Communication Studies and Language	(20)			
	• Engage in sustained oral communication and evaluate spoken texts (ID 8974)	5			
	• Read, analyse and respond to a variety of texts (ID 8975)	5			
	• Write for a wide range of contexts (ID 8976)	5			
	• Use language and communication in occupational learning programmes (ID 8979)	5			
	Physical; mathematical, computer and life sciences	(16)			
	• Demonstrate understanding of real and complex number systems (ID 7485)	3			
	• Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues (ID 7468)	2			
	• Work with a wide range of patterns and inverses of functions and solve related problems (ID7470)	6			
	• Collect and use data to establish complex statistical and probability models and solve related problems (ID 7465)	5			
					36
Core	• Present information to clients to enable informed decisions to be made.	8	• Prepare and present funeral products and services to groups.	10	
	• Inspect and monitor human remains, coffin and finished product.	5	• Present funeral provision options to groups.	5	
	• Monitor and co-ordinate the preparation of the funeral site.	4	• Provide funeral product and services training to individuals and relevant parties.	11	
	• Conduct funeral ceremonies.	6			
	• Co-ordinate and monitor the transportation of human remains, the bereaved and equipment.	5			
	• Maintain and control funeral logistics and administration.	9			
	• Administer the exhumation of human remains.	7			

Elective Embalming and Restoration			<ul style="list-style-type: none"> • Embalm human remains without complications and/or trauma. 	15	15
TOTAL		80		41	121
Marketing and Merchandising	<ul style="list-style-type: none"> • Set up product displays and monitoring housekeeping. • Co-ordinate and monitor sales in a funeral business. • Interact with special interest groups. 	8 7 6			21
TOTAL		101		26	127
Disaster Management			<ul style="list-style-type: none"> • Assess and use data and liase with relevant stakeholders to ensure required resources are in place for a disaster. 	15	15
TOTAL		80		41	121

UNIT STANDARDS FOR NATIONAL HIGHER CERTIFICATE IN FUNERAL SERVICES PRACTICE AT NQF LEVEL 4

UNIT STANDARDS TITLES AT NQF LEVEL 4

1. Title Present information to clients to enable informed decisions to be made
2. Title Inspect and monitor human remains, coffining and finished product.
3. Title Monitor and co-ordinate the preparation of the funeral site.
4. Title Conduct funeral ceremonies.
5. Title Co-ordinate and monitor the transportation of human remains, the bereaved and equipment.
6. Title Maintain and control funeral logistics and administration.
7. Title Administer the exhumation of human remains
8. Title Set up product displays and monitor housekeeping
9. Title Co-ordinate and monitor sales in a funeral business
10. Title Interact with special interest groups

UNIT STANDARDS TITLES AT NQF LEVEL 5

1. Title Prepare and present funeral products and services to groups.
2. Title Present funeral provision options to groups.
3. Title Provide funeral product and services training to individuals and relevant parties.
4. Title Embalm human remains without complications and/or trauma.
5. Title Assess and use data and liaise with relevant stakeholders to ensure required resources are in place for a disaster.

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES FOR NATIONAL HIGHER CERTIFICATE IN FUNERAL SERVICES PRACTICE NQF LEVEL 4

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES AT NQF LEVEL 4

- | | | |
|------------------|--------------|--|
| 1. | Title | Present information to clients to enable informed decisions to be made |
| Specific Outcome | 1.1 | Present funeral options to clients |
| Specific Outcome | 1.2 | Explain and finalise funeral arrangements |
| 2. | Title | Inspect and monitor human remains, coffining and finished product |
| Specific Outcome | 2.1 | Inspect human remains to ensure compliance with set standards and instructions |
| Specific Outcome | 2.2 | Monitor the preparation of human remains and coffining |
| 3. | Title | Monitor and co-ordinate the preparation of the funeral site |
| Specific Outcome | 3.1 | Co-ordinate the preparation of materials and equipment for the funeral site |
| Specific Outcome | 3.2 | Monitor and check the preparation of the funeral and grave site |

- | | | |
|------------------|--------------|--|
| 4. | Title | Conduct funeral ceremonies |
| Specific Outcome | 4.1 | Prepare for the funeral ceremony |
| Specific Outcome | 4.2 | Conduct the funeral ceremony |
| Specific Outcome | 4.3 | Direct the internment ceremony |
| 5. | Title | Co-ordinate and monitor the transportation of human remains, the bereaved and equipment |
| Specific Outcome | 5.1 | Control vehicle usage |
| Specific Outcome | 5.2 | Assess the transfer of human remains |
| Specific Outcome | 5.3 | Monitor the transportation of the bereaved |
| 6. | Title | Maintain and control funeral logistics and administration |
| Specific Outcome | 6.1 | Maintain and control logistical aspects of a funeral |
| Specific Outcome | 6.2 | Monitor and evaluate the implementation of a funeral service |
| Specific Outcome | 6.3 | Monitor funeral administration practices and procedures |
| 7. | Title | Administer the exhumation of human remains |
| Specific Outcome | 7.1 | Process documentation for exhumation of human remains |
| Specific Outcome | 7.2 | Plan exhumations of human remains |
| Specific Outcome | 7.3 | Assist with the internment of the human remains |
| Specific Outcome | 7.4 | Assist with the delivery of the human remains |
| 8. | Title | Set up product displays and monitor housekeeping |
| Specific Outcome | 8.1 | Evaluate funeral merchandise and service displays |
| Specific Outcome | 8.2 | Mark and label funeral merchandise |
| Specific Outcome | 8.3 | Monitor housekeeping standards |
| 9. | Title | Co-ordinate and monitor sales in a funeral business |
| Specific Outcome | 9.1 | Determine client service levels for a funeral business |
| Specific Outcome | 9.2 | Co-ordinate and monitor sales team activities |
| 10. | Title | Interact with special interest groups |
| Specific Outcome | 10.1 | Demonstrate an understanding of various interest groups |
| Specific Outcome | 10.2 | Build relationships with special interest groups |
| Specific Outcome | 10.3 | Co-ordinate and plan funeral projects with special interest groups |

UNIT STANDARDS TITLES AND SPECIFIC OUTCOMES AT NQF LEVEL 5

1.	Title	Prepare and present funeral products and services to groups
Specific Outcome	1.1	Identify and approach potential groups
Specific Outcome	1.2	Gather information, assess group needs and prepare group specifications plan
Specific Outcome	1.3	Present group specifications to groups to meet pre-determined needs
Specific Outcome	1.4	Conduct follow-up procedures in order to reach agreement
2.	Title	Present funeral provision options to groups
Specific Outcome	2.1	Analyse group needs and expectations and identify funeral provision options to meet them
Specific Outcome	2.2	Develop an appropriate funeral provision presentation to meet group and funeral societies needs and expectations
Specific Outcome	2.3	Deliver funeral provision presentation to groups and funeral societies
3.	Title	Provide funeral product and services training to individuals and relevant parties
Specific Outcome	3.1	Assess training needs of individuals, teams and relevant parties
Specific Outcome	3.2	Organise training and development activities for individuals and teams
Specific Outcome	3.3	Assemble materials and equipment and prepare the grave
Specific Outcome	3.4	Organise and arrange the funeral site
4.	Title	Embalm human remains without complications and/or trauma
Specific Outcome	4.1	Perform pre-embalming procedures on human remains without complications and/or trauma
Specific Outcome	4.2	Embalm human remains without complications and/or trauma
5.	Title	Assess and use data and liaise with relevant stakeholders to ensure required resources are in place for a disaster
Specific Outcome	5.1	Assess and use data for decision making purposes
Specific Outcome	5.2	Liaise with relevant parties and stakeholders
Specific Outcome	5.3	Monitor and control data gathering process and its results

NOTICE 1722 OF 2002
SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

Accounting and Financial Management

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standards upon which qualifications are based. The unit standards can be accessed via the SAQA web-site at www.saqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the unit standards should reach SAQA at the address ***below and no later than 13 October 2002***. All correspondence should be marked **Standards Setting – SGB for Accounting and Financial Management** and addressed to

The Director: Standards Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907



PC

SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

UNIT STANDARDS ON NQF LEVEL 5

1. TITLE: Administer and wind up the of estates of deceased persons

LEVEL ON THE NQF: 5

CREDITS: 8

Specific Outcome 1: Demonstrate knowledge of the laws and procedures relating to the administration of estates of deceased persons
Range: Estate Duty Act 1955, Succession Act 1934, Wills Act 1953
Specific Outcome 2: Administer and wind up an estate of a deceased person

Specific Outcome 3: Prepare executors' accounts

2. TITLE: Administer and wind up insolvent estates
Range: Individuals and companies

LEVEL ON THE NQF: 5

CREDITS: 8

Specific Outcome 1: Demonstrate knowledge of the laws and procedures relating to the administration of insolvent estates and liquidations of companies
Range: The Insolvency Act, The Companies Act, Important decisions of the courts, the practice of the High Court and the Registrar of Companies
Specific Outcome 2: Administer and wind up insolvent estates
Range: Individuals and companies
Specific Outcome 3: Prepare trustee and liquidator accounts

3. TITLE: Interpret statutes and provide basic information on South African legislation as it relates to the accounting function

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Demonstrate knowledge of the South African legal system

Specific Outcome 2: Interpret statutes

Range: Law of purchase, sale, letting and hiring, Law of suretyship, Law of insurance, Law of arbitration, Law of marketing, Law of carriage of goods, Legislation relating to financial institutions

Specific Outcome 3: Provide information on aspects of the South African legal system

4. TITLE: Record income and receipts

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Demonstrate an understanding of the general business and accounting environment

Specific Outcome 2: Process documents relating to goods and services supplied

Specific Outcome 3: Receive and record receipts
Range: VAT – where applicable

5. TITLE: Make and record payments

LEVEL ON THE NQF: 5

CREDITS: 8

Specific Outcome 1: Process documents relating to goods and services received

Specific Outcome 2: Prepare authorised payments

Specific Outcome 3: Make and record payments

Specific Outcome 4: Demonstrate an understanding of the business and accounting environment

6. TITLE: Prepare ledger balances and an initial trial balance

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Balance bank transactions

- Specific Outcome 2: Prepare ledger balances and control accounts**
- Specific Outcome 3: Draft an initial trial balance**
- Specific Outcome 4: Demonstrate an understanding of the business and accounting environment**

7. TITLE: Work with information technology in an accounting environment

- LEVEL ON THE NQF: 5**
- CREDITS: 6**
- Specific Outcome 1: Input, store and output data**
- Specific Outcome 2: Minimise risks to data held on a computer system**
Range: Sources of data - Internal, External
- Specific Outcome 3: Use basic computer systems**

8. TITLE: Achieve personal effectiveness in an accounting environment

- LEVEL ON THE NQF: 5**
- CREDITS: 8**
- Specific Outcome 1: Plan and organise own work**
- Specific Outcome 2: Establish and maintain working relationships**
- Specific Outcome 3: Maintain accounting files and records**

9. TITLE: Supply costing information for management control

- LEVEL ON THE NQF: 5**
- CREDITS: 8**
- Specific Outcome 1: Demonstrate an understanding of the business and accounting environment**
- Specific Outcome 2: Code and extract costing information**

Range: Wrong codes, Excessive volumes, Wrong organisation

Specific Outcome 3: Provide comparisons on costs and income

10. TITLE: Maintain financial records and prepare general ledger accounts

LEVEL ON THE NQF: 5

CREDITS: 12

Specific Outcome 1: Maintain records relating to capital acquisition and disposal

Specific Outcome 2: Record income and expenditure
Range: Records - Cash and Petty Cash Book, Journal, Ledger

Specific Outcome 3: Collect and collate information for the preparation of general ledger accounts
Range: Trial balance, Suspense Account

Specific Outcome 4: Prepare the extended trial balance

11. TITLE: Record, analyse and prepare cost information

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Record and analyse information relating to direct costs
Range: Standard and actual material (raw materials, part finished goods, materials issued from stores within the organisation, deliveries) and labour (employees on organisation's payroll; sub-contractors, agency staff) costs, and expenses (direct revenue expenditure)

Specific Outcome 2: Record and analyse information relating to the allocation, apportionment and absorption of overhead costs

Specific Outcome 3: Prepare and present standard cost reports

Specific Outcome 4: Demonstrate an understanding of the business and accounting environment

12. TITLE: Prepare financial reports and returns

Range: Periodic performance reports, Reports and Returns for outside agencies, VAT returns.

LEVEL ON THE NQF: 5

CREDITS: 8

Specific Outcome 1: Prepare and present periodic performance reports
Range: Cost and Revenue information

Specific Outcome 2: Prepare reports and returns for outside agencies

Specific Outcome 3: Prepare VAT returns

Specific Outcome 4: Demonstrate an understanding of the business and accounting environment

13. TITLE: Produce spreadsheets using accounting related information technology

LEVEL ON THE NQF: 5

CREDITS: 8

Specific Outcome 1: Obtain information from a computerised management information system
Range: Information obtained from own work and area of responsibility, obtained on request from others

Specific Outcome 2: Produce spreadsheets for the analysis of numerical information
Range: Spreadsheets include those that require possible rounding errors, have conditions in some formulas, are used to produce graphs

Specific Outcome 3: Contribute to the quality of the management information system
Range: MIS - computerised system

14. TITLE: Contribute to the management of costs and the enhancement of value

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Demonstrate an understanding of the business and accounting environment

Specific Outcome 2: **Collect, analyse and disseminate information about costs**
Range: Movements in prices charged by suppliers, competitors and providers of services, and general price changes

Specific Outcome 3: **Make recommendations to reduce costs and enhance value**

15. TITLE: Contribute to the planning and allocation of resources within an accounting framework

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: **Prepare forecasts of income and expenditure**
Range: Income and expenditure

Specific Outcome 2: **Produce draft budget proposals**
Range: Budget for current expenditure, Resource budget, Capital budget

Specific Outcome 3: **Monitor the performance of responsibility centres against budget**
Range: Budget for current expenditure, Resource budget

Specific Outcome 4: **Demonstrate an understanding of the business and accounting environment**

16. TITLE: Manage accounting systems.

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: **Co-ordinate work activities within the accounting environment**

Specific Outcome 2: **Identify opportunities to improve the effectiveness of an accounting system**
Range: Accounting system refers to one section of an accounting system

Specific Outcome 3: **Identify and report on control deficiencies in an accounting system**
Range: Accounting system refers to one section of an accounting system

Specific Outcome 4: Demonstrate an understanding of the management and accounting environment

17. TITLE: Draft financial statements
Range: Accounting practice, Industry and Commerce

LEVEL ON THE NQF: 5

CREDITS: 12

Specific Outcome 1: Demonstrate an understanding of the business and accounting environment

Specific Outcome 2: Identify financial statement information
Range: Balance sheet, Income statement

Specific Outcome 3: Draft year end financial statements
Range: Limited Company (unitary, consolidated), Sole Trader, Close Corporation, Partnership

18. TITLE: Operate a cash management and credit control system

LEVEL ON THE NQF: 5

CREDITS: 10

Specific Outcome 1: Monitor and control cash receipts and payments
Range: Regular revenue receipts and payments, capital receipts and payments, drawings or dividends and disbursements, exceptional receipts and payments

Specific Outcome 2: Manage cash balances

Specific Outcome 3: Grant credit

Specific Outcome 4: Monitor and control the collection of debts

19. TITLE: Contribute to the implementation of auditing procedures
Range: Internal and external auditing process

LEVEL ON THE NQF: 5

CREDITS: 12

- Specific Outcome 1:** Contribute to the planning of an audit assignment
Range: Manual and computerised accounting systems
- Specific Outcome 2:** Contribute to the conduct of an audit assignment
Range: Manual and computerised accounting systems which include purchases, sales, stock, expenses, balance sheet items, payroll
- Specific Outcome 3:** Prepare related draft reports
Range: Manual and computerised systems
- Specific Outcome 4:** Demonstrate an understanding of the business and auditing environment

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- 20. TITLE:** Prepare business tax returns
Range: Tax returns, Provisional tax returns, STC returns

LEVEL ON THE NQF: 5

CREDITS: 12

- Specific Outcome 1:** Calculate taxable income from trade and complete business sections of tax returns
Range: IT 12 returns
- Specific Outcome 2:** Prepare computations of capital allowances and recoupments
Range: Recoupments refers to general, set-off and further recoupments
- Specific Outcome 3:** Calculate and account for provisional tax payments
Range: Clients - persons other than companies
- Specific Outcome 4:** Adjust income or losses of companies to taxable income and complete company tax returns
Range: Companies and Close Corporations, IT 14 return
- Specific Outcome 5:** Calculate and account for STC (Secondary Tax on Companies)
Range: Companies and Close Corporations

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- 21. TITLE:** Prepare personal tax returns
Range: Tax returns, Provisional tax returns

LEVEL ON THE NQF: 5

CREDITS: 10

- Specific Outcome 1:** Calculate income from employment, SITE and PAYE deductions
Range: PAYE return
- Specific Outcome 2:** Prepare computations of investment, royalty and rental taxable income
Range: Recoupments refers to general, set-off and further recoupments. Exemptions refers to amounts exempted in terms of current legislation in respect of investment incomes, Section 6 exemptions, and amounts not from a source in the Republic or not deemed to be from a source in the Republic
- Specific Outcome 3:** Calculate taxable portions of lump sum benefits
Range: Clients - persons other than companies
- Specific Outcome 4:** Prepare personal tax returns and calculate the tax liability
*Range: Returns relating to individuals.
Rating; Primary, Over 65 years of age*

UNIT STANDARDS AT NQF LEVEL 6

1.	TITLE:	Recognise, measure, classify and record financial and non-financial data
	LEVEL ON THE NQF:	5
	CREDITS:	8
	Specific Outcome 1:	Recognise financial and non-financial data <i>Range: Assets, liabilities, financial position, financial performance, non-financial information.</i>
	Specific Outcome 2:	Classify financial and non-financial data
	Specific Outcome 3:	Measure and record financial and non-financial data
2.	TITLE:	Interpret and assess the regulatory environment governing corporate entities in South Africa <i>Range: Company law, the Close Corporations Act and Legal nature of partnerships</i>
	LEVEL ON THE NQF:	6
	CREDITS:	12
	Specific Outcome 1:	Interpret and assess the basic tenets of company law relating to the regulatory environment governing corporate entities in South Africa
	Specific Outcome 2:	Interpret and assess the basic tenets of the Close Corporations Act relating to the regulatory environment governing corporate entities in South Africa
	Specific Outcome 3:	Ensure compliance with specific aspects of the regulatory environment governing corporate entities in South Africa <i>Range: Company law and the Close Corporations Act</i>
3.	TITLE:	Apply concepts and principles of business ethics in the professional environment
	LEVEL ON THE NQF:	6
	CREDITS:	5
	Specific Outcome 1:	Demonstrate an understanding of the concepts and principles relating to business ethics in the professional environment

Specific Outcome 2: Exercise professional judgement with regard to practical situations

Specific Outcome 3: Use ethical procedures in a professional environment

4. TITLE: Apply concepts and principles relevant to the practical aspects of corporate governance and accountability.

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Explain the responsibilities of the different role players and the principles of corporate governance and accountability

Specific Outcome 2: Prepare information concerning practical aspects of corporate governance and accountability

Specific Outcome 3: Demonstrate knowledge of risk management elements related to corporate governance

5. TITLE: Apply and design systems of internal financial audit control
Range: Manual and computerised environments

LEVEL ON THE NQF: 6

CREDITS: 12

Specific Outcome 1: Demonstrate knowledge of the principles of systems of internal financial control

Specific Outcome 2: Design systems of internal financial control

Specific Outcome 3: Evaluate current and new systems of internal financial control
Range: Networks and electronic data exchange, Internet and Intranets, Electronic commerce, Outsourcing, Stand-alone microcomputer systems, Online computer systems, Database systems

Specific Outcome 4: Apply the fundamental concepts of information technology

6. TITLE: Design, evaluate and apply cost management systems and techniques in the business environment

LEVEL ON THE NQF: 6

CREDITS: 12

- Specific Outcome 1:** Design and evaluate costing systems appropriate for various types of organisations and processes
- Specific Outcome 2:** Calculate, record and report cost management information
- Specific Outcome 3:** Apply cost management techniques
Range: Advanced management accounting techniques, Costing and cost management (materials, labour, overheads)

- 7. TITLE:** Select and apply financing instruments in the valuation of a business entity and financial assets

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Apply the principles of finance to the valuation of business and financial assets
- Specific Outcome 2:** Select and apply financing instruments in business and asset valuations
- Specific Outcome 3:** Conduct business entity and financial asset valuations

- 8. TITLE:** Interpret and apply the laws and procedures related to taxes levied
Range : Income Tax Act

2. LEVEL ON THE NQF: 6

3. CREDITS: 8

- Specific Outcome 1:** Interpret and apply the Income Tax Act
- Specific Outcome 2:** Keep abreast of and explain developments in the field of taxation
- Specific Outcome 3:** Apply the laws and procedures relating to taxes levied

- 9. TITLE:** Interpret and apply the laws and procedures relating to the duty which is levied on the estates of deceased persons
Range: Estate Duty Act 1955, Succession Act 1934, Wills Act 1953

LEVEL ON THE NQF: 6

CREDITS 8

- Specific Outcome 1:** Interpret legislation related to Estate Duty

Specific Outcome 2: Keep abreast of and explain developments in the field of taxation

Specific Outcome 3: Apply the laws and procedures relating to estate duty

10. TITLE: Interpret and apply the laws and procedures related to value-added tax
Range: Value-added Tax Act

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Interpret the Value-added Tax Act

Specific Outcome 2: Keep abreast of and explain developments in the field of taxation

Specific Outcome 3: Apply the laws and procedures relating to taxes levied

11. TITLE: Identify, implement and manage Information System financial control strategy
Range: Basic and complex businesses

LEVEL ON THE NQF: 6

CREDITS: 12

Specific Outcome 1: Identify the controls necessary in business cycles and their related Information System environments

Specific Outcome 2: Establish and evaluate the controls necessary for the information system implementation process

Specific Outcome 3: Participate in the implementation of Information System controls

Specific Outcome 4: Manage business cycle and Information System control strategies
Range: Accounting system, Control procedures, Control design, Control over data and system integrity, Continuity of processing/ disaster recovery planning and control, IS processing/operations

12. TITLE: Analyse and participate in the design of Information Systems

LEVEL ON THE NQF: 6

CREDITS: 12

- Specific Outcome 1:** Demonstrate an understanding of the role of information in organisation design and behaviour
- Specific Outcome 2:** Participate in the analysis and design of information systems
- Specific Outcome 3:** Maintain control over system development processes

13. TITLE: Apply computer-assisted audit techniques (CAAT's)

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Demonstrate an understanding of Computer-assisted Audit Techniques (CAAT's)
- Specific Outcome 2:** Evaluate and report on Computer-assisted Audit Techniques (CAAT's)
- Specific Outcome 3:** Execute and control Computer-assisted Audit Techniques (CAAT's) as a team

14. TITLE: Interpret provisions of a contract and assess liability of clients and other parties to an agency agreement

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Interpret the provisions of a contract
Range: Definition and essential elements, Voidable contracts, Operation, Parties, Contents, Obligations, Cession, delegation and variation, Termination, Breach of contract
- Specific Outcome 2:** Interpret the law of agency
- Specific Outcome 3:** Assess the liability of clients and other parties to an agency agreement

15. TITLE: Identify and assess negotiable instruments relating to modes of payment

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Demonstrate knowledge of the rules governing modes of payment

- Specific Outcome 2: Identify negotiable instruments**
- Specific Outcome 3: Assess the legal consequences of instruments**

- 16. TITLE: Identify and administer processes relating to property transaction, mortgage and pledge laws**

- LEVEL ON THE NQF: 6**
- CREDITS: 10**
- Specific Outcome 1: Demonstrate knowledge of laws relating to property transactions, mortgages and pledges**
- Specific Outcome 2: Demonstrate understanding of the effects of various forms of security**
- Specific Outcome 3: Identify and assess executed documents governing security**

- 17. TITLE: Provide advice to clients on the legal principles of labour law**
Range: Labour Relations Act

- LEVEL ON THE NQF: 6**
- CREDITS: 8**
- Specific Outcome 1: Demonstrate knowledge of the Labour Relations Act**
Range: Labour Relations Act
- Specific Outcome 2: Collate common law service contracts**
- Specific Outcome 3: Provide advice to clients on basic labour law**

- 18. TITLE: Apply the uses and limitations of quantitative techniques used in managerial accounting, financial accounting and auditing**

- LEVEL ON THE NQF: 6**
- CREDITS: 10**
- Specific Outcome 1: Demonstrate and understanding of various quantitative statistical techniques**
- Specific Outcome 2: Apply the uses of quantitative techniques in managerial accounting, financial accounting and auditing processes**
- Specific Outcome 3: Interpret solutions and identify limitations of analysis**

-
19. **TITLE:** Determine what is taxable income.
Range: Within context, excluding specialist areas covered by current tax legislation.
-

LEVEL ON THE NQF: 6

CREDITS: 16

Specific Outcome 1: Determine what is gross income.

Specific Outcome 2: Determine and advise on which income is exempt from tax.

Specific Outcome 3: Identify and calculate deductions and allowances

20. **TITLE:** Calculate the taxation of persons other than companies.
-

LEVEL ON THE NQF: 6

CREDITS: 15

Specific Outcome 1: Determine the normal tax liability of natural persons.

Specific Outcome 2: Determine the normal tax liability of partnerships.

Specific Outcome 3: Determine the normal tax liability of trusts.

Specific Outcome 4: Determine the normal tax liability of deceased estates.
Range: Income tax

Specific Outcome 5: Determine the normal tax liability of insolvent estates.

21. **TITLE:** Calculate the taxation of companies.
-

LEVEL ON THE NQF: 6

CREDITS: 16

Specific Outcome 1: Determine the normal tax liability of companies.

Specific Outcome 2: Determine and comment on the taxation of dividends.

Specific Outcome 3: Determine and comment on the secondary tax on companies.

Specific Outcome 4: Apply the special provisions relating to unbundling and group rationalisation.

Specific Outcome 5: Establish and comment on what is deemed trading stock.

-
- 19. TITLE: Determine what is taxable income.**
Range: Within context, excluding specialist areas covered by current tax legislation.
-

LEVEL ON THE NQF: 6

CREDITS: 16

Specific Outcome 1: Determine what is gross income.

Specific Outcome 2: Determine and advise on which income is exempt from tax.

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- 20. TITLE: Calculate the taxation of persons other than companies.**
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LEVEL ON THE NQF: 6

CREDITS: 15

Specific Outcome 1: Determine the normal tax liability of natural persons.

Specific Outcome 2: Determine the normal tax liability of partnerships.

Specific Outcome 3: Determine the normal tax liability of trusts.

Specific Outcome 4: Determine the normal tax liability of deceased estates.
Range: Income tax

Specific Outcome 5: Determine the normal tax liability of insolvent estates.

- 21. TITLE: Calculate the taxation of companies.**
-

LEVEL ON THE NQF: 6

CREDITS: 16

Specific Outcome 1: Determine the normal tax liability of companies.

Specific Outcome 2: Determine and comment on the taxation of dividends.

Specific Outcome 3: Determine and comment on the secondary tax on companies.

Specific Outcome 4: Apply the special provisions relating to unbundling and group rationalisation.

Specific Outcome 5: Establish and comment on what is deemed trading stock.

22. TITLE: Determine the taxation of income from farming operations.

LEVEL ON THE NQF: 6

CREDITS: 15

Specific Outcome 1: Determine the taxation of income from farming operations.

Specific Outcome 2: Demonstrate a working knowledge of the provisions of the Income Tax Act relating to farming operations

23. TITLE: Identify the special tax provisions.

LEVEL ON THE NQF: 6

CREDITS: 12

Specific Outcome 1: Determine, calculate and comment on the credit agreements, debtors' allowances and the taxation of townships.

Specific Outcome 2: Determine, calculate and comment on foreign exchange profits and losses

Specific Outcome 3: Calculate and comment on the amount of interest incurred and accrued.

24. TITLE: Calculate the taxation of lump-sum benefits.

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Calculate and comment on the taxation of lump-sum benefits from retirement funds.

Specific Outcome 2: Calculate and comment on the taxation of lump-sum benefits from employment

25. TITLE: Apply the provisions relating to non-resident taxpayers.

LEVEL ON THE NQF: 6

CREDITS: 8:

Specific Outcome 1: Apply and comment on the normal tax provisions.

Specific Outcome 2: Determine and advise on the tax consequences of royalties accruing to non-residents.

Specific Outcome 3: Apply and advise on the provisions of double tax agreements.

26. TITLE: Apply provisions relating to the concept of tax avoidance.

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Apply the general provisions relating to tax avoidance.

Specific Outcome 2: Apply the specific provisions relating to tax avoidance.

27. TITLE: Calculate donations tax.

LEVEL ON THE NQF: 6

CREDITS: 6:

Specific Outcome 1: Identify and comment on donations subject to donations tax.

Specific Outcome 2: Calculate donations tax

28. TITLE: Ensure compliance with the general tax provisions.

LEVEL ON THE NQF: 6

CREDITS: 12

Specific Outcome 1: Ensure compliance with the provisions relating to returns and books, accounts and records.

Specific Outcome 2: Ensure compliance with the provisions relating to assessments.

Specific Outcome 3: Ensure compliance with and comment on the provisions relating to objection, appeal and review.

Specific Outcome 4: Ensure compliance with the provisions relating to payment recovery and refund.

Specific Outcome 5: Exhibit a working knowledge of the provisions relating to representative taxpayers.

Specific Outcome 6: Ensure compliance with the provisions relating to administration.

Specific Outcome 7: Apply the provisions relating to penalties and additional tax.

29. TITLE: Calculate employees' tax and provisional tax.

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Calculate and comment on employees' tax.

Specific Outcome 2: Calculate and comment on provisional tax.

30. TITLE: Identify and value fringe benefits and allowances.

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Identify the inclusions in gross income.

Specific Outcome 2: Determine the inclusions in taxable income.

Specific Outcome 3: Establish and apply exemptions from tax

Specific Outcome 4: Calculate and advise on the deductions and allowances.

Specific Outcome 5: Identify and value benefits or advantage derived.

31. TITLE: Determine the dutiable amount for estate duty purposes.

LEVEL ON THE NQF: 6

CREDITS: 14

Specific Outcome 1: Determine what is property and deemed property.

Specific Outcome 2: Comply with administration regulations

Specific Outcome 3: Determine the dutiable amount.

Specific Outcome 4: Calculate estate duty payable

32. TITLE: Apply the principles of estate planning.

LEVEL ON THE NQF: 6**CREDITS:** 12**Specific Outcome 1: Demonstrate a working knowledge of the objectives of estate planning.****Specific Outcome 2: Apply the objectives of estate planning.****Specific Outcome 3: Determine the tools of estate planning****Specific Outcome 4: Determine the steps to estate planning.**

33. TITLE: Determine and apply the concepts of Value-added Tax.

LEVEL ON THE NQF: 6**CREDITS:** 14**Specific Outcome 1: Determine the imposition of Value-added Tax.****Specific Outcome 2: Apply adjustments and provisions****Specific Outcome 3: Demonstrate a working knowledge of other special Value-added Tax provisions.****Specific Outcome 4: Determine and advise on what are zero-rated and exempt supplies.****Specific Outcome 5: Apply the tax avoidance provisions.**

34. TITLE: Calculate Output Tax.

LEVEL ON THE NQF: 6**CREDITS:** 12**Specific Outcome 1: Apply the relevant definitions of Output tax****Specific Outcome 2: Determine the time and value of supply.****Specific Outcome 3: Determine and value deemed supplies**

35. TITLE: Determine and calculate Input Tax.

LEVEL ON THE NQF: 6**CREDITS:** 12**Specific Outcome 1:** Calculate and comment on the tax payable.**Specific Outcome 2:** Identify denied Input Tax deductions.**Specific Outcome 3:** Apply and comment on the provisions relating to secondhand goods.**Specific Outcome 4:** Determine and comment on the requirements of tax invoices, credit notes and debit notes.

36. TITLE: Identify and calculate the Value-added Tax adjustments.

LEVEL ON THE NQF: 6**CREDITS:** 8**Specific Outcome 1:** Identify Value-added Tax adjustments.**Specific Outcome 2:** Calculate and comment on Value-added Tax adjustments

37. TITLE: Comply with Value-added Tax administration.

LEVEL ON THE NQF: 6**CREDITS:** 6**Specific Outcome 1:** Determine and apply the need for registration.**Specific Outcome 2:** Discuss and apply different accounting bases.**Specific Outcome 3:** Determine the general provisions of VAT administration.

38. TITLE: Prepare and analyse financial reports for different types of business entities.*Range: Companies, Close Corporations, Partnerships*

LEVEL ON THE NQF: 6**CREDITS:** 16

- Specific Outcome 1:** Select, measure, record, classify and report accounting data.
- Specific Outcome 2:** Select, evaluate and report non-financial information that is relevant to risk.
- Specific Outcome 3:** Prepare and comment on financial reports for different legal forms of business entities
- Specific Outcome 4:** Identify and contrast different forms of entities in respect of the different characteristics of equity.
- Specific Outcome 5:** Prepare financial statements using appropriate bases of measurement and appropriate concepts of capital.
- Specific Outcome 6:** Analyse and interpret historic cost and current value financial statements.

-
- 39. TITLE:** Advise and report on schemes for changes in the form and capital structure of an entity.
-

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Advise on design changes in the form or capital structure of an entity
- Specific Outcome 2:** Incorporate and advise on changes in the form or capital structure of an entity in the financial statements

-
- 40. TITLE:** Identify the responsibilities, functions and qualities of the auditor.
-

LEVEL ON THE NQF: 6

CREDITS: 5

- Specific Outcome 1:** Describe the background information pertaining to the audit profession.
- Specific Outcome 2:** Apply the concepts and principles relevant to the audit function
- Specific Outcome 3:** Describe the registration and function of the audit firm.
- Specific Outcome 4:** Determine and apply the legal rights and responsibilities of the auditor.

41. TITLE: Establish a framework for internal control and internal control evaluation.

LEVEL ON THE NQF: 6**CREDITS:** 10**Specific Outcome 1:** Describe and apply the objectives, nature and evaluation of internal control.**Specific Outcome 2:** Provide information on the objectives, nature and evaluation of internal control.

42. TITLE: Establish the procedures for obtaining audit evidence

LEVEL ON THE NQF: 6**CREDITS:** 8**Specific Outcome 1:** Determine the objectives of and aspects to consider when planning an audit.**Specific Outcome 2:** Explain the nature of, and apply the procedures for obtaining audit evidence.**Specific Outcome 3:** Describe and apply the process involved in using the work of others.

43. TITLE: Exhibit an awareness of the process of reporting external audit findings.

LEVEL ON THE NQF: 6**CREDITS:** 4**Specific Outcome 1:** Explain the process of reporting audit findings.**Specific Outcome 2:** Explain the process of reporting special purpose audit findings.**Specific Outcome 3:** Describe the concepts and procedures involved in related service engagements and reports.

44. TITLE: Apply the various statutory requirements relating to Company Law that relate to the audit function.

LEVEL ON THE NQF: 6

CREDITS: 6

Specific Outcome 1: Advise on and apply the relevant rules of Company Law.

Specific Outcome 2: Exhibit sound understanding and the ability to apply and advise on the rules of Company Law.

Specific Outcome 3: Exhibit a basic understanding of the PFMA, Treasury regulations and the Municipal Finance Act

45. TITLE: Evaluate and provide costing and cost management information

LEVEL ON THE NQF: 6

CREDITS: 6

Specific Outcome 1: Comment on and evaluate cost classification, behaviour and objectives

Specific Outcome 2: Comment on and evaluate cost volume profit.

Specific Outcome 3: Evaluate, apply and comment on relevant costing.

46. TITLE: Evaluate and advise on costing and cost management information for material, labour and overheads

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Evaluate and advise on the cost management of material

Specific Outcome 2: Evaluate and advise on the cost management of labour

Specific Outcome 3: Evaluate and advise on overhead costs.

-
47. **TITLE:** Apply the concept of management accounting techniques in an advanced manufacturing environment.
-

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Demonstrate a working knowledge of activity-based management.

Specific Outcome 2: Make recommendations for total quality management in an organisation.

Specific Outcome 3: Demonstrate a working knowledge of the concept of benchmarking.

Specific Outcome 4: Demonstrate a working knowledge of the concept of target costing.

Specific Outcome 5: Apply linear programming for costing.

Specific Outcome 6: Demonstrate a working knowledge of the concept of non-financial performance measures.

48. **TITLE:** Provide costing information on the management of accounting information systems

Range: in relation to types of costing systems and allocation of costs.

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Interpret financial and non-financial information of database contents.

Specific Outcome 2: Determine and evaluate the different types of costing systems.

Specific Outcome 3: Explain and evaluate the concept of the allocation of costs.

49. **TITLE:** Determine dividend decisions
-

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Define the factors affecting the dividend decision.

Specific Outcome 2: Calculate dividend reinvestment options

50. TITLE: Demonstrate a working knowledge of and advise on marketing.

LEVEL ON THE NQF: 6

CREDITS: 6

Specific Outcome 1: Describe different types of marketing and the marketing function

Specific Outcome 2: Explain the definition of a product, the concept of price and distribution systems.

Specific Outcome 3: Explain the concept of promotion.

51. TITLE: Use the computer as a business tool in an accounting environment.

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Describe the basic elements of a computer-based information system.

Specific Outcome 2: Use computer applications, commonly found in the business environment, for accounting functions.

Specific Outcome 3: Describe the movement of data through typical commercial systems.

Specific Outcome 4: Identify opportunities to use the computer as a business tool.

52. TITLE: Contribute to the implementation, post-implementation review and maintenance of information systems.

LEVEL ON THE NQF: 6

CREDITS: 16

Specific Outcome 1: Describe the basic concepts of information systems.

Specific Outcome 2: Identify the basic issues that determine the way in which computer-based information systems are implemented, evaluated and maintained.

- Specific Outcome 3:** Participate in conducting feasibility studies.
- Specific Outcome 4:** Specify user information systems requirements.
RANGE: These criteria apply only to systems which will be used by the candidates to perform appropriate business functions (e.g. financial systems)
- Specific Outcome 5:** Contribute to the implementation of information systems.
RANGE: These criteria apply only to systems which will be used by the candidates to perform appropriate business functions (e.g. financial systems)
NOTE: "Implementation" is used to mean the process of both "building/developing", and "installing" information systems
- Specific Outcome 6:** Conduct post-implementation reviews of information systems.
- Specific Outcome 7:** Identify the types of system maintenance and describe techniques for maintaining and upgrading systems.
- Specific Outcome 8:** Establish and evaluate procedures for acquiring information system components.

53. TITLE: Participate in the management of information systems resources.

LEVEL ON THE NQF: 6

CREDITS: 10

- Specific Outcome 1:** Describe procedures that can be used to determine information systems strategy.
- Specific Outcome 2:** Identify the issues associated with managing information systems personnel.
- Specific Outcome 3:** Describe how information systems projects are managed.
- Specific Outcome 4:** Describe the functions of the Facilities/Operations Department
- Specific Outcome 5:** Determine the costs associated with implementing and executing information systems.

54. TITLE: Apply the processes of planning and control as they relate to budgeting, standard costing and decentralised control.

LEVEL ON THE NQF: 6

CREDITS: 15

- Specific Outcome 1:** Apply the concept of budgeting.

Specific Outcome 2: Apply the concept of standard costing

Specific Outcome 3: Explain and apply the concept of decentralised control.

55. TITLE: Prepare financial statement analysis.

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Explain the objective of the firm.

Specific Outcome 2: Prepare financial statement analysis.

56. TITLE: Determine the relationship between risk and return.

LEVEL ON THE NQF: 6

CREDITS: 8

Specific Outcome 1: Determine risk assessment

Specific Outcome 2: Determine return

57. TITLE: Determine the cost of capital

Range: Cost of debt, Preference shares, Equity and Weighted average of goods

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Determine the cost of debt, preference shares and equity

Specific Outcome 2: Determine the weighted average cost of capital.

58. TITLE: Determine capital investment appraisal

LEVEL ON THE NQF: 6

CREDITS: 10

Specific Outcome 1: Determine capital budgeting decisions.

Specific Outcome 2: Select and apply capital budgeting techniques.

Specific Outcome 3: Demonstrate a working knowledge of investment appraisal

59. TITLE: Develop understanding within an organisation about the risks associated with its functioning and contexts

LEVEL ON THE NQF: 6

CREDITS: 5

Specific Outcome 1: Advise on an organisation's strategies, processes, capabilities and the contextual dynamics affecting its functioning

Specific Outcome 2: Profile the organisation's philosophy on risk

Specific Outcome 3: Advise on the risk management strategies of the organisation

Specific Outcome 4: Provide advice on relating the organisation's risk management philosophies and their implementation

60. TITLE: Develop understanding within an organisation about the adequacy and effectiveness of its control strategies, structures and systems

LEVEL ON THE NQF: 6

CREDITS: 5

Specific Outcome 1: Profile an organisation's control philosophies

Specific Outcome 2: Determine the control strategies and structure of the organisation

Specific Outcome 3: Assess the adequacy and effectiveness of existing or proposed control strategies, structures and systems

Specific Outcome 4: Promote understanding within the organisation about the adequacy and effectiveness of its control strategies, structures and systems

61. TITLE: Manage the internal auditing function

LEVEL ON THE NQF: 6**CREDITS: 8****Specific Outcome 1: Determine and apply the responsibilities of the internal auditor****Specific Outcome 2: Manage key relationships and networks****Specific Outcome 3: Establish and secure the capabilities required by the internal auditor function****Specific Outcome 4: Structure the work of the internal auditor function****Specific Outcome 5: Manage quality control and improvement****Specific Outcome 6: Contribute to the development of the profession**

UNIT STANDARDS AT NQF LEVEL 7

1. TITLE: Prepare financial reports for different forms of entity

Range: Balance sheet, Income statement, Cash flow statement, Statement showing either all changes in equity or changes in equity other than those arising from capital transactions with owners and distribution to owners, Accounting policies and explanatory notes, Director's report, Segmental report, Provisional report, Interim report, Any other statement that may be required in terms of GAAP

LEVEL ON THE NQF: 7**CREDITS:** 16**Specific Outcome 1: Classify, measure and disclose assets and liabilities****Specific Outcome 2: Classify, measure and disclose elements of financial position and performance**

Range: Financial instruments, Tangible fixed assets, Intangible assets, Current and long-term investments, Inventories and work-in-progress, Receivables and prepayments, Cash, Liabilities and provisions

Specific Outcome 3: Prepare financial reports

Range: Under appropriate bases for measurement and appropriate concepts of capital

2. TITLE: Conduct a financial audit for a business entity**LEVEL ON THE NQF:** 7**CREDITS:** 18**Specific Outcome 1: Apply requirements of the Law to practical audit situations****Specific Outcome 2: Identify audit approach, procedure and sampling principles****Specific Outcome 3: Gather audit evidence****Specific Outcome 4: Analyse audit findings****Specific Outcome 5: Report audit findings**

-
3. **TITLE:** Provide advice on financial management.
Range: Investment, financing, dividend decisions, change in ownership transactions, management of working capital, foreign exchange and investments.
-

LEVEL ON THE NQF: 7

CREDITS: 12

Specific Outcome 1: Demonstrate an understanding of the functions of financial management

Specific Outcome 2: Provide advice on the management of working capital, foreign exchange, investments and change in ownership transactions

Specific Outcome 3: Advise clients in a professional manner

4. **TITLE:** Provide advice to clients on the creation of trusts
-

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Demonstrate knowledge of the effects of trusts
Range: Inter-vivos and testamentary trusts

Specific Outcome 2: Define and assess the rights, duties and powers of the trustee and administrator

Specific Outcome 3: Provide advice to clients on the creation of trusts
Range: Inter-vivos and testamentary trusts

5. **TITLE:** Interpret causes and effects of economic events and take economic issues into account when furnishing clients with financial advice
Range: Domestic and International economic events
-

LEVEL ON THE NQF: 7

CREDITS: 10

Specific Outcome 1: Demonstrate an understanding of the workings of a mixed economy with a free market orientation

Specific Outcome 2: Demonstrate an understanding of the causes and effects of domestic and international economic events

Specific Outcome 3: Provide financial advice to clients within the framework of economic issues

-
- 6. TITLE: Participate in organisational strategy management from a financial management perspective**
Range: All types of organisation, not only for-profit organisations
-

LEVEL ON THE NQF: 7

CREDITS: 12

Specific Outcome 1: Participate in business strategy design

Specific Outcome 2: Contribute to value maximisation in the organisation

Specific Outcome 3: Provide financial management advice

-
- 7. TITLE: Evaluate and apply the processes of planning and control as they relate to corporate strategy, budgeting, pricing decision, standard costing and decentralised control.**
-

LEVEL ON THE NQF: 7

CREDITS: 14

Specific Outcome 1: Discuss corporate strategy and long-term planning.

Specific Outcome 2: Apply and evaluate the concept of budgeting.

Specific Outcome 3: Discuss the pricing decision.

Specific Outcome 4: Evaluate and determine the concept of decentralised control

Specific Outcome 5: Apply the concept of standard costing.

-
- 8. TITLE: Apply and evaluate the function of financial management as it relates to the objective of the firm, strategic financial management and financial statement analysis.**
-

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Discuss the objective of the firm.

Specific Outcome 2: Discuss strategic financial management.

Specific Outcome 3: Advise on and evaluate financial statement analysis.

- 9. TITLE: Apply and provide advice on the valuation of a business entity**
Range: valuation of equity, preference shares, debentures and bonds, and convertible securities

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Describe valuation as it relates to techniques

Specific Outcome 2: Identify and advise on the objects of valuations

Specific Outcome 3: Select and apply an appropriate valuation basis

- 10. TITLE: Determine decisions under risk and uncertainty as they relate to risk assessment and techniques for assessing risk.**

LEVEL ON THE NQF: 7

CREDITS: 10

Specific Outcome 1: Discuss risk assessment

Specific Outcome 2: Determine and apply quantitative techniques for assessing risk

Specific Outcome 3: Determine issues in investment appraisal

- 11. TITLE: Evaluate and advise on the cost of capital.**

LEVEL ON THE NQF: 7

CREDITS: 12

Specific Outcome 1: Explain and advise on the concept of cost of debt.

Specific Outcome 2: Explain and advise on the concept of cost of preference shares.

Specific Outcome 3: Explain and advise on the concept of cost of equity.

Specific Outcome 4: Explain and advise on the concept of weighted average cost of capital.

12. TITLE: Comment on capital investment appraisal.

LEVEL ON THE NQF:	7
CREDITS:	14
Specific Outcome 1:	Determine and advise on capital budgeting decisions and techniques.
Specific Outcome 2:	Determine issues in investment appraisal.
Specific Outcome 3:	Determine and advise on capital projects.

13. TITLE: Determine, apply and comment on the financing policy.

LEVEL ON THE NQF:	7
CREDITS:	10
Specific Outcome 1:	Define capital and money markets.
Specific Outcome 2:	Discuss the theory of capital structure.
Specific Outcome 3:	Determine the sources and forms of finance.
Specific Outcome 4:	Analyse and evaluate long-term and short-term finance implications
Specific Outcome 5:	Evaluate and comment on the concept of leasing versus borrowing

14. TITLE: Advise on working capital policy and management.

LEVEL ON THE NQF:	7
CREDITS:	8
Specific Outcome 1:	Provide recommendations on policies and management approaches for working capital and management
Specific Outcome 2:	Provide recommendations on the concept of inventories.
Specific Outcome 3:	Make recommendations on the concept of accounts payable.

15. TITLE: Apply and advise on the finance function

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Describe the role of finance

Specific Outcome 2: Advise on the concept of cash management.

Specific Outcome 3: Apply the concept of interest rate and debt management.

Specific Outcome 4: Manage the foreign exchange rate and describe financial turnaround strategies

Specific Outcome 5: Manage investment portfolios

Specific Outcome 6: Apply the concepts and processes pertaining to derivatives.

16. TITLE: Calculate and determine mergers, take-overs and divestitures

LEVEL ON THE NQF: 7

CREDITS: 15

Specific Outcome 1: Apply security regulations panel constraints.

Specific Outcome 2: Determine pricing considerations.

Specific Outcome 3: Determine the impact of synergy and evaluate implications on a merger, take-over or divestiture.
Range: Implication includes behavioural, legal and taxation implications.

Specific Outcome 4: Determine the appropriate financing options and conduct a post-acquisition review.

17. TITLE: Identify and comment on the responsibilities, functions and qualities of the registered accountant and auditor.

LEVEL ON THE NQF: 7

CREDITS: 15

Specific Outcome 1: Explain the information pertaining to the audit profession.

-
- Specific Outcome 2:** Explain the information pertaining to the audit firm.
- Specific Outcome 3:** Describe regulatory and standard setting procedures
- Specific Outcome 4:** Determine the professional and business ethics governing the work of the auditor
- Specific Outcome 5:** Identify the rights and duties covered by statute.
- Specific Outcome 6:** Identify and explain the responsibilities and legal liability of the auditor.
- Specific Outcome 7:** Exhibit a general awareness of developments in the audit profession.
- Specific Outcome 8:** Apply the subject matter.
-

18. TITLE: Apply and advise on the various stages and functions of the audit process.

LEVEL ON THE NQF: 7

CREDITS: 25

- Specific Outcome 1:** Explain and comment on the audit process.
- Specific Outcome 2:** Explain and comment on financial statement assertions
- Specific Outcome 3:** Explain and analyse the objectives and aspects for consideration during the planning of an audit and the assessment of audit risk.
- Specific Outcome 4:** Describe and comment on the objectives, nature and process of evaluation of internal control.
- Specific Outcome 5:** Explain and comment on the nature of and procedures for obtaining audit evidence.
- Specific Outcome 6:** Describe and evaluate the process involved in using the work of others.
- Specific Outcome 7:** Describe and evaluate the process involved in using the work of others.
- Specific Outcome 8:** Explain and evaluate the process of reporting special purpose audit findings.
- Specific Outcome 9:** Describe and evaluate the concepts and procedures involved in related service engagements.
- Specific Outcome 10:** Demonstrate competence in understanding and analyzing the subject matter on a regular basis with skill and expertise.

19. TITLE: Apply and advise on the various statutory requirements relating to company law.

LEVEL ON THE NQF: 7

CREDITS: 15

Specific Outcome 1: List and advise on the relevant rules of Company Law.

Specific Outcome 2: Apply the various statutory requirements relating to company law

20. TITLE: Calculate and advise on the nature and classification of costs.

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Demonstrate a working knowledge of cost classification.

Specific Outcome 2: Analyse cost behaviour.

Specific Outcome 3: Calculate and comment on cost volume- profit.

Specific Outcome 4: Identify cost objectives or objects.

Specific Outcome 5: Determine relevant costing.

21. TITLE: Evaluate and advise on the costing and management of material cost.

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Determine and evaluate material cost and advise on different bases to assign costs

Specific Outcome 2: Evaluate inventory systems.

22. TITLE: Evaluate and advise on the costing and management of labour cost.

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Determine and evaluate labour cost and advise on different bases to assign costs

Specific Outcome 2: Calculate and analyse learning and experience costs.

23. TITLE: Evaluate and advise on the costing and management of overhead costs.

LEVEL ON THE NQF: 7

CREDITS: 8

Specific Outcome 1: Demonstrate a working knowledge of overhead costs

Specific Outcome 2: Evaluate and advise on bases of assigning overhead to objects.

24. TITLE: Apply and comment on management accounting in an advanced manufacturing environment
Range: Management Accounting Techniques.

LEVEL ON THE NQF: 7

CREDITS: 15

Specific Outcome 1: Identify opportunities for applying activity-based management.

Specific Outcome 2: Describe and apply total quality management.

Specific Outcome 3: Apply the concept of benchmarking.

Specific Outcome 4: Explain the concept of target costing.

Specific Outcome 5: Apply the concept of linear programming.

Specific Outcome 6: Apply concepts relating to operations management.

Specific Outcome 7: Apply the concept of backflush accounting.

Specific Outcome 8: Evaluate the impact of throughput accounting.

25. TITLE: Comment on the management of accounting information systems.

LEVEL ON THE NQF: 7

CREDITS: 15

- Specific Outcome 1:** Evaluate and apply information data bases for decision-making purposes
- Specific Outcome 2:** Apply different types of costing systems.
- Specific Outcome 3:** Determine and advise on the allocation of costs.
- Specific Outcome 4:** Demonstrate an understanding of financial modeling.

- 26. TITLE:** Demonstrate a working knowledge of and advise on organizational behaviour.

LEVEL ON THE NQF: 7

CREDITS: 12

Specific Outcome 1: Explain the concept of leadership skills

Specific Outcome 2: Evaluate and advise on the effect of management accounting information on human behaviour

- 27. TITLE:** Advise on the function of financial management.

LEVEL ON THE NQF: 7

CREDITS: 16

Specific Outcome 1: Discuss the objectives of business entities

Specific Outcome 2: Apply the principles of strategic planning and design an organisational structure

Specific Outcome 2: Make strategic financial management decisions.

Specific Outcome 3: Prepare financial statement analysis.

- 28. TITLE:** Design and advise on financial structures, financial planning and control and resulting decision-making methodology

4. LEVEL ON THE NQF: 7

5. CREDITS: 25

Specific Outcome 1: Apply forecasting techniques

- Specific Outcome 2:** Make strategic financial management decisions.
- Specific Outcome 3:** Evaluate the results of business process re-engineering.
- Specific Outcome 4:** Produce and evaluate budgets
- Specific Outcome 5:** Design cost reduction schemes and conduct cost-benefit analysis
- Specific Outcome 6:** Advise on value analysis and the value chain.
- Specific Outcome 7:** Comment on the pricing decision.
- Specific Outcome 8:** Design a standard costing system.
- Specific Outcome 9:** Apply the concept of decentralized control.

- 29. TITLE:** Contribute to improvements in the functioning of the organisation's risk management and control systems

LEVEL ON THE NQF: 7

CREDITS: 10

- Specific Outcome 1:** Establish credibility for involvement in improvement initiatives.
- Specific Outcome 2:** Establish the purposes and types of involvement to be sustained with relevant parties within an organisation
- Specific Outcome 3:** Conduct assignments in respect of risk management and control systems
- Specific Outcome 4:** Provide follow-up advice and support
- Specific Outcome 5:** Establish the level of effectiveness and satisfaction with the improvements to the risk management and control systems

- 30. TITLE:** Provide on-going assurance to the organisation that it is in control relative to its risks.

LEVEL ON THE NQF: 7

CREDITS: 10

- Specific Outcome 1:** Establish assurance strategies and plans
- Specific Outcome 2:** Establish the scope of assurance projects
- Specific Outcome 3:** Identify and develop the methodologies relevant to an assurance project.

-
- Specific Outcome 4: Establish a project plan**
Specific Outcome 5: Conduct the assurance project
Specific Outcome 6: Communicate and negotiate the results of the assurance project with relevant parties within the organisation
-

31. TITLE: Determine and apply concepts of municipal taxation

- LEVEL ON THE NQF: 7**
CREDITS: 18
Specific Outcome 1: Determine property tax
Specific Outcome 2: Collect property tax
Specific Outcome 3: Apply the RSC levy

NOTICE 1723 OF 2002
SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

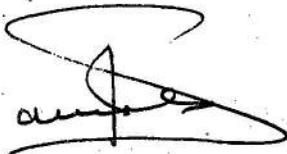
Financial Services

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the unit standards upon which qualifications are based. The unit standards can be accessed via the SAQA web-site at www.saga.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the unit standards should reach SAQA at the address *below and no later than 13 October 2002*. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standards Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907



PP **SAMUEL B.A. ISAACS**
EXECUTIVE OFFICER

UNIT STANDARDS FOR FACTORING AND DISCOUNTING**1. Title: Demonstrate knowledge and understanding of factoring as a lending vehicle**

- Specific outcome 1: Demonstrate knowledge and understanding of traditional business lending
- Specific outcome 2: Compare factoring to traditional business lending
- Specific outcome 3: Explain the different types of factoring
- Specific outcome 4: Match business needs to the appropriate factoring product

2. Title: Demonstrate a knowledge and understanding of the specific risks related to factoring as a lending vehicle

- Specific outcome 1: Demonstrate knowledge and understanding of risk factors associated with debtors as security
- Specific outcome 2: Demonstrate a knowledge and understanding of the risk associated with collecting a business' debtors
- Specific outcome 3: Demonstrate knowledge and understanding of the risk of poor quality financial administration
- Specific outcome 4: Demonstrate knowledge and understanding of the risk of business deterioration
- Specific outcome 5: Describe risk management principles associated with factoring

3. Title: Establish the collectable value of a business' debtors book

- Specific outcome 1: Explain the nature of debtor asset value
Specific outcome 2: Analyse the debtors book
Specific outcome 3: Evaluate risk associated with individual debtors
Specific outcome 4: Assign a factoring value to the debtors book

4. Title: Evaluate the quality of a business's debtor administration

- Specific outcome 1: Demonstrate a knowledge and understanding of the requirements for effective bookkeeping practice in relation to debtors
Specific outcome 2: Gather the required information
Specific outcome 3: Verify debtor records
Specific outcome 4: Evaluate quality of debtor administration
Specific outcome 5: Identify risks

5. Title: Report findings of debtor administration review to inform future credit decisions

- Specific outcome 1: Review documentation
Specific outcome 2: Explain current findings
Specific outcome 3: Highlight risks
Specific outcome 4: Draft report

6. Title: Calculate advance against offer of invoices presented for discounting

- Specific outcome 1: Identify risks associated with the offer of invoices
- Specific outcome 2: Assess the offer
- Specific outcome 3: Evaluate the quality of debtors
- Specific outcome 4: Calculate the amount of the advance
- Specific outcome 5: Prepare acknowledgement of offer

7. Title: Establish the security cover over the factoring liability provided by debtors in factoring

- Specific outcome 1: Demonstrate knowledge and understanding of key financial concepts associated with evaluating a business' stability
- Specific outcome 2: Analyse audited management accounts to establish the financial stability of the business in its current trading position
- Specific outcome 3: Evaluate business deterioration or growth
- Specific outcome 4: Evaluate quality of the debtors as a form of security for money advanced
- Specific outcome 5: Evaluate the effectiveness of actual security cover over the factoring liability

8. Title: Demonstrate a knowledge and understanding of the requirements of import and export factoring

- Specific outcome 1: Demonstrate knowledge and understanding of international trade

Specific outcome 2: Demonstrate a knowledge and understanding of basic international finance

Specific outcome 3: Compare import/export factoring with a letter of credit

Specific outcome 4: Demonstrate knowledge and understanding of the process of initiating import/export factoring

Specific outcome 5: Describe risk management principles associated with import/export factoring

9. Title: Demonstrate knowledge and understanding of a factoring agreement

Specific outcome 1: Demonstrate knowledge and understanding of the basic concepts associated with the factoring agreement

Specific outcome 2: Demonstrate knowledge and understanding of the specific requirements of the factoring house's agreement

Specific outcome 3: Explain the administrative implications of the factoring agreement

Specific outcome 4: Explain the operational risk management implications of the factoring agreement

Specific outcome 5: Demonstrate knowledge and understanding of the breakdown in a contractual relationship between a factoring house and supplier

10. Title: Identify factorable invoices

Specific outcome 1: Demonstrate knowledge and understanding of factoring criteria of a good debtor

Specific outcome 2: Explain debtor exclusions

- Specific outcome 3: Explain the nature of invoices too risky to discount
- Specific outcome 4: Explain the requirements for invoices offered for discounting
- Specific outcome 5: Analyse an offer of invoices for discounting to identify factorable invoices

11. Title: Demonstrate knowledge and understanding of accounting practice and procedure associated with collection of debts

- Specific outcome 1: Demonstrate knowledge and understanding of the impact of collections on factoring profit and loss
- Specific outcome 2: Reconcile a debtor's account
- Specific outcome 3: Handle disputes
- Specific outcome 4: Account for debt collections

12. Title: Manage the operational aspects of the factoring relationship with supplier

- Specific outcome 1: Demonstrate knowledge and understanding of the operational requirements from a factoring perspective
- Specific outcome 2: Demonstrate knowledge and understanding of the supplier's requirements from factoring
- Specific outcome 3: Educate the supplier representative
- Specific outcome 4 : Resolve supplier's operational problems

13. Title: Take on a business' debtors book in full

Specific outcome 1: Demonstrate knowledge and understanding of the take-on policies and procedures

Specific outcome 2: Set up factoring records

Specific outcome 3: Set up the internal risk management procedures

Specific outcome 4: Balance the debtors ledger

NOTICE 1724 OF 2002
SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

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

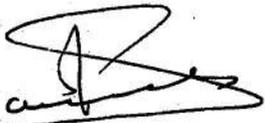
Financial Services

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

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Comment on the unit standards should reach SAQA at the address *below and no later than 13 October 2002*. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standards Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907



pp **SAMUEL B.A. ISAACS**
EXECUTIVE OFFICER

Unit Standards for Asset Based Finance: NQF Level 2

1. **Title :** **Maintain and administer documents relating to client accounts**
- Specific outcome 1: Assemble documentation relating to client accounts
- Specific outcome 2: Process and store the documentation according to company policy
- Specific outcome 3: Retrieve stored documents on request
- Specific outcome 4: Dispose of stored documents
2. **Title :** **Demonstrate an understanding of legal and ethical terminology in a banking environment**
- Specific outcome 1: Describe the contractual capacity of different trading entities
(Range: minors, persons married in and out of community of property, divorced persons, insolvent persons, the mentally incapacitated, alcoholics, drug addicts, sole proprietors, partnerships, close corporations, public companies, private companies, informal bodies such as churches, clubs, societies, non-profit organisations, trusts)
- Specific outcome 2: Identify a range of different contract types and explain their importance to the organisation in banking situations
- Specific outcome 3: Identify and briefly describe the regulations affecting the banking environment
- Specific outcome 4: Explain the importance of ethical behaviour at work

Unit Standards for Asset Based Finance: NQF Level 3

3. **Title :** **Process and administer financial applications for movable assets (personal)**
- Specific outcome 1: Receive, capture and validate the application or order
(Range: new applications, existing credit facility)
- Specific outcome 2: Produce the documents relevant to the application
(Range: contract, letter of declination or referral)
- Specific outcome 3: Finalise the transaction

4. **Title :** **Manage security documentation in an asset based financing environment**
- Specific outcome 1: Process new security documents
(Range: suretyship forms, cession and pledge forms and bond forms relating to the various legal entities such as individuals, sole proprietorships, close corporations, partnerships and companies)
- Specific outcome 2: Maintain and administer security documentation
- Specific outcome 3: Realise securities
- Specific outcome 4: Release securities
5. **Title :** **Manage the legal and administrative process for the collection of arrears within an asset banking environment**
- Specific outcome 1: Identify the legal and administrative procedures to be followed when handing an arrears account over to the legal department
- Specific outcome 2: Hand over the case to the legal department
- Specific outcome 3: Collect and recover the outstanding balance
6. **Title :** **Carry out asset based financing activities on the computer system**
- Specific outcome 1: Demonstrate an understanding of the workflow processes in an asset based financing environment
- Specific outcome 2: Capture data onto the system for specific processes
- Specific outcome 3: Understand and operate the system
- Specific outcome 4: Understand and work with the Internet as it applies to a banking environment
7. **Title :** **Prepare vehicle financing proposals and documentation**
- Specific outcome 1: Identify customer requirements and options
- Specific outcome 2: Apply relevant financing/leasing documentation
- Specific outcome 3: Apply relevant insurance documentation
- Specific outcome 4: Process a vehicle financing application

8. Title : **Demonstrate an understanding of the legal and professional requirements pertaining to the asset based financing environment**
- Specific outcome 1: Evaluate the contractual capacity of a range of different trading entities based on the information available
(Range: minors, persons married in and out of community of property, divorced persons, insolvent persons, the mentally incapacitated, alcoholics, drug addicts, sole proprietors, partnerships, close corporations, public companies, private companies, informal bodies such as churches, clubs, societies, non-profit organisations, trusts)
- Specific outcome 2: Evaluate a range of contract types and explain the implications thereof to the organisation in asset based financing situations
- Specific outcome 3: Demonstrate an understanding of the regulations affecting the banking environment
- Specific outcome 4: Demonstrate professional behaviour at work
9. Title : **Perform basic mathematical calculations in a banking environment**
- Specific outcome 1: Select and perform basic interest rate calculations in a banking environment
- Specific outcome 2: Explain, select and perform calculations based on the time value of money
- Specific outcome 3: Explain and apply VAT related calculations
- Specific outcome 4: Explain and perform exchange rate calculations in a banking context
- Specific outcome 5: Apply the use of basic business arithmetic in a banking environment
10. Title : **Manage pre-legal collections in an asset based financing environment**
- Specific outcome 1: Identify the nature of the default
(Range: first instalment default (FID), unpaid items such as cheques or debit orders, contract expired accounts, outstanding payments on unreconciled accounts, accounts with either one, or more than one, instalment in arrears)
- Specific outcome 2: Trace and contact defaulting customers according to company procedures

- Specific outcome 3: Administer arrangements in cases when the customer is able to pay
- Specific outcome 4: Administer arrangements in cases where the customer is unable to pay
- Specific outcome 5: Establish that all pre-legal processes have been followed

11. Title: Demonstrate an understanding of macroeconomic principles as they apply to the South African business environment

- Specific outcome 1: Explain economic concepts
- Specific outcome 2: Describe the relationships between the major players in the economy of a country
(Range: households, firms, the government, the foreign sector and the financial sector)
- Specific outcome 3: Evaluate the past and current performance of economics in different countries by reference to the major macroeconomic objective
(Range: positive economic growth, full employment, price stability (inflation), balance of payments stability and equitable distribution of income)
- Specific outcome 4: Describe the dynamics of the monetary sector

Unit Standards for Asset Based Finance: NQF Level 4

12. Title: Terminate and refinance leases in an asset based banking environment

- Specific outcome 1: Identify leases or rentals to terminate
- Specific outcome 2: Establish client contact for the purpose of discussing further options
- Specific outcome 3: Refinance the lease or rental
- Specific outcome 4: Finalise the refinancing arrangement

13. Title: Process and administer financial applications for movable assets (corporate)

- Specific outcome 1: Receive, capture and validate the application or order
(Range: new applications, existing credit facility)
- Specific outcome 2: Produce the documents relevant to the application
(Range: contract, letter of declination or referral)
- Specific outcome 3: Finalise the transaction

14. **Title:** **Provide after-sales customer service in an asset based financing environment**
- Specific outcome 1: Identify the nature of a variety of customer queries
- Specific outcome 2: Discuss and propose possible options and solutions
- Specific outcome 3: Attend to the customer query

15. **Title:** **Administer a floorplan facility and inspections in an asset based financing environment**
- Specific outcome 1 : Administer the ongoing floorplan facility
- Specific outcome 2 : Terminate the floorplan facility
- Specific outcome 3 : Conduct floorplan vehicle inspections

Unit Standards for Asset Based Finance: NQF Level 5

16. **Title:** **Market and prepare a floorplan facility in an asset based financing environment**
- Specific outcome 1: Market a floorplan facility to clients
- Specific outcome 2: Prepare a floorplan documentation based on client needs
- Specific outcome 3: Present the floorplan proposal to the client

17. **Title:** **Assess credit for a floorplan facility in an asset based financing environment**
- Specific outcome 1: Identify the areas of risk associated with floorplan facility credit
- Specific outcome 2: Assess the credit risk for a particular client
- Specific outcome 3: Formulate a client proposal based on the identified risk profile
- Specific outcome 4: Finalise the floorplan facility for a specific client

NOTICE 1725 OF 2002

The South African Qualifications Authority in terms of the National Standards Bodies Regulations (Government Gazette No. 18787) published on 28 March 1998, hereby give notice of additional names of the following Standards Generating Bodies:

NSB 09 : HEALTH SCIENCES AND SOCIAL SERVICES**SGB for Medical Technicians**

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Bushney, G V (replacing S Pillay)	Ampath Laboratories KZN Region	Ampath Laboratories	Nat Dip Med Tech (Microbiology & Chemical Pathology); Nat Dip (Haematology); Dip in Management Development; 26 years Clinical Experience; 10 years' managerial
Hartell, S M (replacing G J Deeks)	Lancet Laboratories	Lancet Laboratories	Dip in Med Lab Technology; 20 years' clinical experience

Resignation:

S Pillay
G J Deeks

SGB for Medical Laboratory Assistants

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Schwagele, A (replacing C Strydom)	South African National Blood Service: Durban	South African National Blood Service	Med Tech; 11 years' clinical experience 4 years' training & staff development

Resignation:

C Strydom

Yours sincerely,



JOE SAMUELS

DIRECTOR : STANDARDS SETTING AND DEVELOPMENT

The South African Qualifications Authority in terms of the National Standard Body Regulations (Government Gazette No. 18787) published on 28 March 1998, hereby publishes the new appointments of the National Standard Body on Health Sciences and Social Services (09).

NSB 07 : HUMAN AND SOCIAL SERVICES

Category	Nomination	Nominated by	Workplace
LABOUR	Mr T J G Louw	FEDUSA	University of Fort Hare

NSB 09 : HEALTH AND SOCIAL SERVICES

Category	Nomination	Nominated by	Workplace
Business	Mr Robert Wesigye (replace Ms Grace Magano)	National Federated Chamber of Commerce and Industry (NAFCOC)	NAFCOC

NSB 10 : PHYSICAL, MATHEMATICAL, COMPUTER AND LIFE SCIENCES

Category	Nomination	Nominated by	Workplace
Business	Mr F Gersbach	Business South Africa	TDF Computer People Development

Yours sincerely



SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

NOTICE 1726 OF 2002

The South African Qualifications Authority in terms of the National Standard Body Regulations (Government Gazette No. 18787) published on 28 March 1998, hereby publishes the new names of persons nominated to serve as members of the following National Standard Bodies (**NSB 02, 04, 09, 11 & 12**) and their national stakeholder bodies. SAQA invites comment with respect to the acceptability of the nominees and the representativeness of the national bodies with key interests in the field.

Kindly forward any comment not later than **14 October 2002** to:

The Executive Officer
South African Qualification Authority
Postnet Suite 248
Private Bag X06
WATERKLOOF
0145

Attention: Mr J Samuels
Director : Standards Setting and Development

Telephone: (012) 482 0807
Fax: (012) 482 0907

Yours sincerely,



SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

NSB 02 : CULTURE AND ARTS

Category	Nomination	Nominated by	Workplace
Critical Interest Group	H N Bantjies	Youth Commission	North West Provincial Admin

NSB 04 : COMMUNICATION AND LANGUAGE STUDIES

Category	Nomination	Nominated by	Workplace
Critical Interest Group	P Sithembele	Disabled People in SA	Disabled People in SA
	Dr P Grové (replacing Dr S Hauptfleisch)	South Africa Music Education Forum (SAMEF)	Part-time Lecturer at the University of Pretoria

Resignation:

Mr B van Rooyen

NSB 09 : HEALTH SCIENCES AND SOCIAL SERVICES

Category	Nomination	Nominated by	Workplace
State	Ms R Mdlalose (replacing Dr S J H Hendricks)	Department of Health	Department of Health
Critical Interest Group	Prof M Viljoen (replacing Ms H Subedar)	The SA Nursing Council	Universty of the Free State

NSB 11 : SERVICES

Category	Nomination	Nominated by	Workplace
Critical Interest Group	C Swepu	Youth Commission	University of the Western Cape

NSB 12 : PLANNING, CONSTRUCTION AND PHYSICAL

Category	Nomination	Nominated by	Workplace
Critical Interest Group	P Kadi	Youth Commission	University of the Western Cape

NOTICE 1727 OF 2002

The South African Qualifications Authority in terms of the National Standards Bodies Regulations (Government Gazette No. 18787) published on 28 March 1998, hereby give notice of additional names of the following Standards Generating Bodies:

NSB 04: COMMUNICATION STUDIES AND LANGUAGE**Additional names for the SGB for Audio-Visual Production**

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Bonmariage, G (Replacing P. Mseleku)	National Film and Video Foundation	National Film and Video Foundation	Has extensive international and national experience in various aspects of Audio-Visual Production.
Adams, S (Replacing S. Mdlalose)	Media and Training Centre for Health	SGB for Audio-Visual Production	Holds a certificate in multi-media management skills.
Doherty, C (Replacing J. du Toit)	University of the Witwatersrand	SGB for Audio-Visual Production	Is Director of the New Media Laboratory and SABC chair of Cyber broadcasting.
Putter, P (Replacing S. Molefe)	GasWorks	Independent Producers Organisation	Is Film and Television Producer.
Games, M (Replacing S. Glasson)	Independent Film Producer	SGB for Audio-Visual Production	Has extensive experience in Journalism field and is Manager for TV News Training at the SABC.

NSB 07: HUMAN AND SOCIAL STUDIES**Additional Names For the SGB for Life Skills**

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Tsela Moloji	National Department of Education	National Department of Education	Currently completing M. Ed (University of North West), B. Ed (University of Witwatersrand), Bachelor of Arts (University of Sofia, Bulgaria) Deputy Chief Education Specialist: Coordinating ABET Curriculum (National Department of Education), First Education Specialist: Coordinator of ABET Curriculum, Taught at High School level (Grade 8-11), Community work

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Carmel Marock	Usombomvu Youth Fund	Usombomvu Youth Fund	Completing a Masters in Engineering (University of Witwatersrand), Post-graduate Diploma: Engineering (Project Management) (University of Witwatersrand), Psychology Honours (University of Western Cape), Bachelor of Social Science and Humanities (University of Cape Town). Coordinating Skills Development programmes, Assisting SETAs with skills planning and learnership design, working with Council for Higher Education (CHE) on quality assurance issues, worked as a National Education Training and Grading Coordinator, policy development, National Youth Service Initiative (NYSI): National Education and Training Officer.
Tebogo Matoane	Joint Enrichment Project (JEP)	Joint Enrichment Project (JEP)	Completing Masters in Development Studies (University of Free State), Completing mini thesis for Masters of Education (Rand Afrikaans University), Bachelor of Education (Hons) (Witwatersrand University), Bachelor of Library and Information Science in Education (University of the North), Diploma in Human Resources Management (Damelin Management school). Training and Advocacy Manager, Programmes Manager, Training and development of fieldworkers and facilitators, communities and community based organisations, developing democracy and human rights training material, trainer for gender and the media for youth community radio broadcasters, Adult educator for out of school youth and domestic workers
Thebe D. Benjamin Mokgothu	Department of Health (North West Province)	South African Youth Council	Currently completing B.Tech Construction Management, National Diploma of Building, Media Liaison Officer for the South African Youth Council. Previously worked as the Co-ordinator of activities and projects for Young Christian Students, Worked as an Assistant Building Project Manager, Trained people at ABET level

Resignations

Linsey Cook
M Lerutla
D. Lucy Maraka
M Naidoo is replaced by Tebogo Matoane
S Nhlabatini

NSB 07: HUMAN AND SOCIAL STUDIES**Additional Names for the SGB for Sociology**

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Rhoda Kadalie	Impumelelo Innovations Award Trust	Impumelelo Innovations Award Trust	Honorary Doctorate in Liberal Arts (University of Uppsala, Sweden), BA Honours Anthropology (University of Western Cape), Bachelor of Library Science: Majors; Library Science, English, Anthropology. Executive Director: Impumelelo Innovations Award Trust, Head of District Land Claims Unit, Human Rights Commissioner: Western Cape, Northern Cape, External Examiner, Gender Equity Officer, Lecturer in Anthropology; Contemporary Debates in Feminism. Human Rights commissioner for the Western and Northern Capes,

NSB 07: HUMAN AND SOCIAL STUDIES**ADDITIONAL Names for the SGB for Christian Theology and Ministry**

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Lynn D. Fletcher	SA Council for Theological Education (SACTE)	SA Council for Theological Education (SACTE)	BA Honours Secretary of the SA Council for Theological Education (SACTE), Secretary for the Association of Southern African Theological Institutions, Registrar: Joint Board for the Diploma in Theology, Director for the Theological Education by Extension College
Rev James W. Massey	Theological Education by Extension College	Church Based Seminaries and Institutions	MA (Natal University), BA Honours (Natal University), BA (Rhodes University), B.Sc. (Chemical Engineering) (Natal University). Principal of Theological Education by Extension College, Trainer at Probationer and Lay Ministers, Ministered at various Methodist Churches of Southern Africa, Lecturer at Federal Theological Seminary. .
Rev Charmaine Morgan	John Wesley College	Church Based Seminaries and Institutions	BTh Hons (UNISA), Ordained as Methodist Minister, B Logopedics (University of Pretoria) Lecturer at John Wesley College, Coordinator of Training for the Ordained Ministry, Speech & Hearing Therapist for National Department of Education

NOMINEE	WORKPLACE	NOMINATING BODY	EXPERIENCE/ QUALIFICATIONS
Rev William T. Ndala	Baptist Convention College	Church Based Seminaries and Institutions	Currently completing PhD at the University of Pretoria, MA (Theology) (Manchester University, England), BA Education (Vista) (Mamelodi Campus), Diploma in Theology (BBI) Pastor of a Church, Taught at High School level, Involved in Adult Basic Education and Training
Father Enrico Parry	St John Vianney Seminary	Church Based Seminaries and Institutions	Licentiate in Sacred Theology: Dogma (Pontifical Urban University, Rome), Bachelor of Sacred Theology: St John Vianney Seminary, Pretoria (Pontifical Urban University, Rome), Bachelor of Arts: Sociology and Education (UNISA). Formator and Lecturer, Co-Chaplain. Co-Parish Priest
Rev Victor V.Q Tshangela	John Wesley College	SA Council for Theological Education (SACTE)	Registered for a PhD (University of Natal), Master of Theology (University of Durban-Westville, Bachelor of Theology (Rhodes University)

Resignations

Denise Ackerman
 Rev Adrian Chatfield is replaced by Rev James Massey
 J Cochrane
 Wynand de Kock
 John Goliath is replaced by Rev Charmaine Morgan
 Johan Gous
 Bill Houston
 Fiona Krige is replaced by Lynn Fletcher
 Rev Leslie Moonsamy
 Nick King is replaced by Father Enrico Parry
 Paul Mzisa is replaced by Rev William Ndala

Yours sincerely,



JOE SAMUELS

DIRECTOR : STANDARDS SETTING AND DEVELOPMENT

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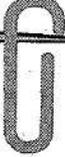
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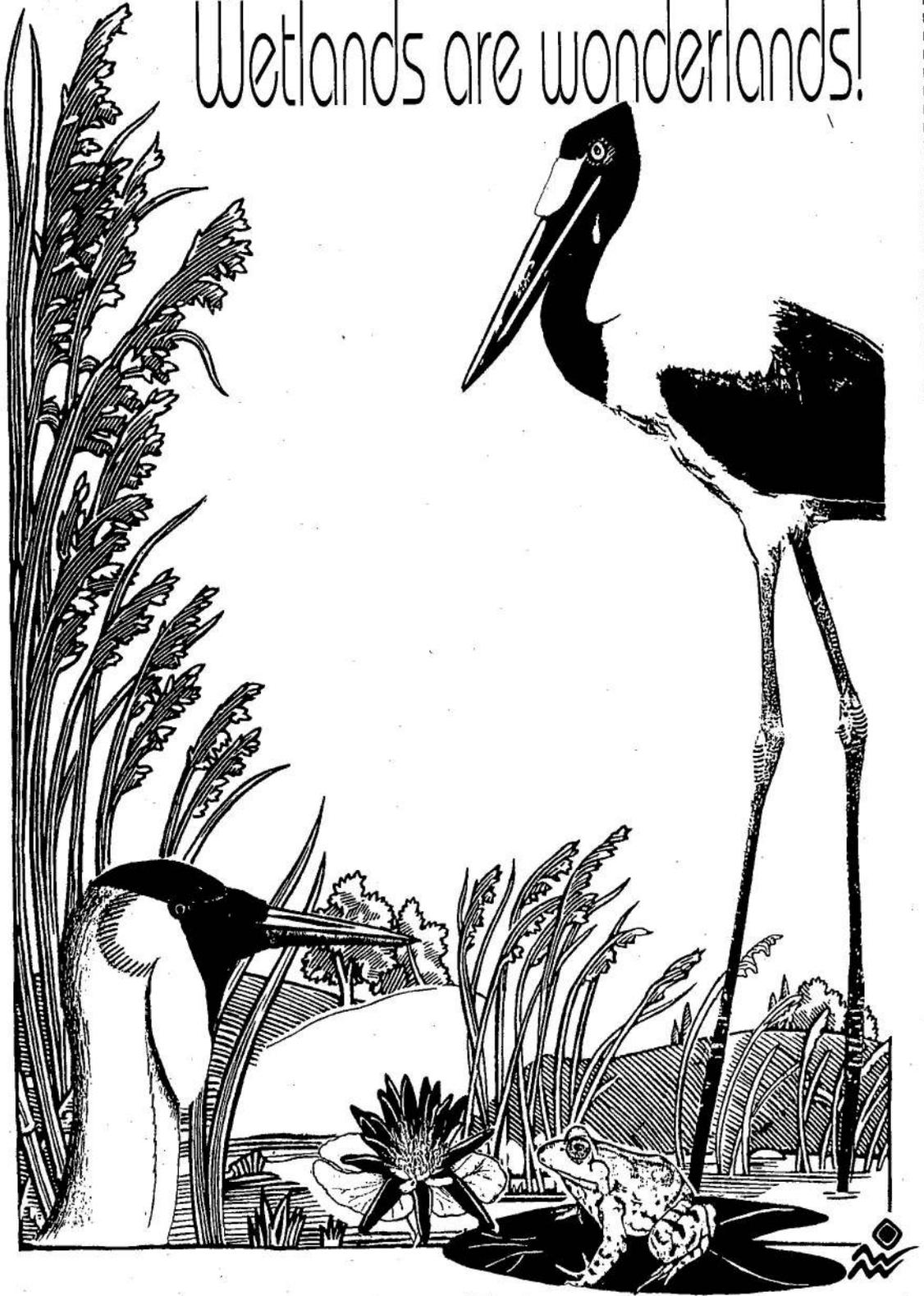
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