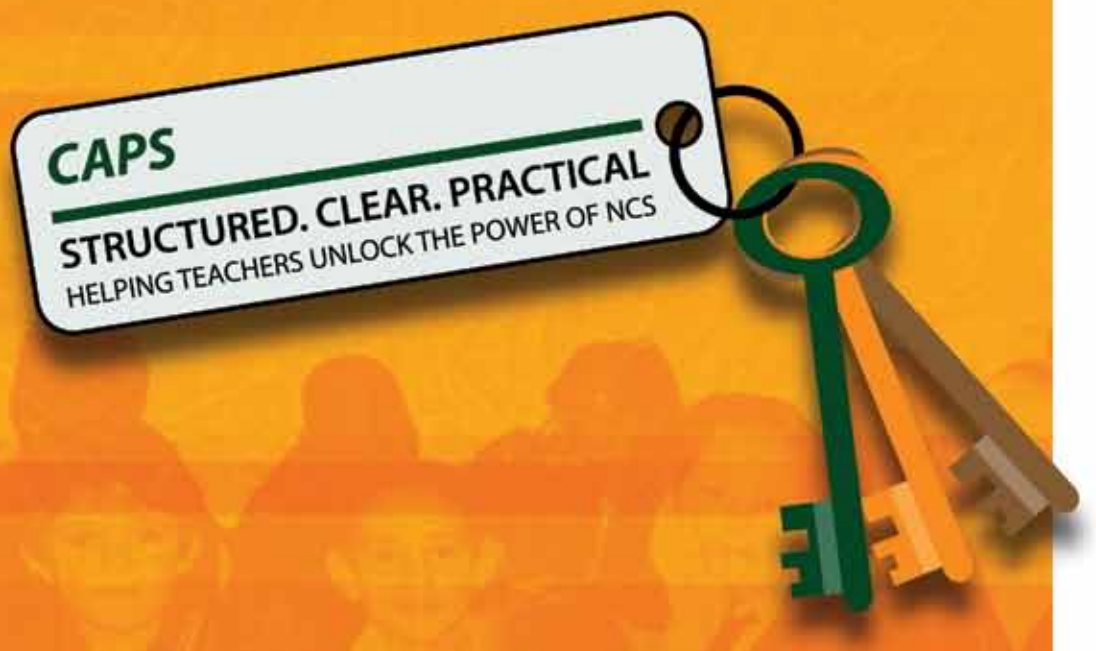
ECONOMIC AND MANAGEMENT SCIENCES

National Curriculum Statement (NCS)

Curriculum and Assessment Policy Statement



Senior Phase
Grades 7-9

basic education
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Basic Education
REPUBLIC OF SOUTH AFRICA

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CURRICULUM AND ASSESSMENT POLICY STATEMENT
GRADES 7-9

ECONOMIC AND MANAGEMENT SCIENCES

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FOREWORD BY THE MINISTER

Our national curriculum is the culmination of our efforts over a period of seventeen years to transform the curriculum bequeathed to us by apartheid. From the start of democracy we have built our curriculum on the values that inspired our Constitution (Act 108 of 1996). The Preamble to the Constitution states that the aims of the Constitution are to:

- heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights;
- improve the quality of life of all citizens and free the potential of each person;
- lay the foundations for a democratic and open society in which government is based on the will of the people and every citizen is equally protected by law; and
- build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations.

Education and the curriculum have an important role to play in realising these aims.

In 1997 we introduced outcomes-based education to overcome the curricular divisions of the past, but the experience of implementation prompted a review in 2000. This led to the first curriculum revision: the *Revised National Curriculum Statement Grades R-9* and the *National Curriculum Statement Grades 10-12* (2002).

Ongoing implementation challenges resulted in another review in 2009 and we revised the *Revised National Curriculum Statement* (2002) and the *National Curriculum Statement Grades 10-12* to produce this document.

From 2012 the two National Curriculum Statements, for *Grades R-9* and *Grades 10-12* respectively, are combined in a single document and will simply be known as the *National Curriculum Statement Grades R-12.* The *National Curriculum Statement for Grades R-12* builds on the previous curriculum but also updates it and aims to provide clearer specification of what is to be taught and learnt on a term-by-term basis.

The *National Curriculum Statement Grades R-12* represents a policy statement for learning and teaching in South African schools and comprises of the following:

(a) Curriculum and Assessment Policy Statements (CAPS) for all approved subjects listed in this document;

(b) *National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12*; and

(c) *National Protocol for Assessment Grades R-12.*

MRS ANGIE MOTSHEKGA, MP
MINISTER OF BASIC EDUCATION

CONTENTS

SECTION 1: INTRODUCTION TO THE CURRICULUM AND ASSESSMENT POLICY STATEMENT 3

1.1 Background 3

1.2 Overview 3

1.3 General aims of the South African Curriculum 4

1.4 Time Allocation 6

1.4.1 Foundation Phase 6

1.4.2 Intermediate Phase 6

1.4.3 Senior Phase 7

1.4.4 Grades 10-12 7

SECTION 2: ECONOMIC AND MANAGEMENT SCIENCES 8

2.1 What is Economic and Management Sciences? 8

2.2 Overview of content 9

2.3 Time allocation of Economic and Management Sciences in the curriculum 10

2.4 Teaching and learning materials required for Economic and Management Sciences 10

SECTION 3 TERM PLANS 11

3.1 Overview of topics 11

3.2 Annual teaching plan 12

GRADE7, TERM 1 12

GRADE7, TERM 2 13

GRADE7, TERM 3 14

GRADE7, TERM 4 15

GRADE8, TERM 1 16

GRADE8, TERM 2 17

GRADE8, TERM 3 18

GRADE8, TERM 4 19

GRADE9, TERM 1 20

GRADE9, TERM 2 21

GRADE9, TERM 3 22

GRADE9, TERM 4 23

SECTION 4 ASSESSMENT IN ECONOMIC AND MANAGEMENT SCIENCES 24

4.1 Introduction 24

4.2 Informal assessment or daily assessment 24

4.3 Formal assessment 25

4.3.1 Summary of formal assessments expected in Grades 7 to 9 25

4.3.2 Formal assessment requirements for Economic and Management Sciences 25

4.4 Programme of Assessment 28

4.5 Recording and reporting 30

4.6 Moderation of assessment 31

4.7 General 31

SECTION 1: INTRODUCTION TO THE CURRICULUM AND ASSESSMENT POLICY STATEMENT

1.1 BACKGROUND

The *National Curriculum Statement Grades R-12 (NCS)* stipulates policy on curriculum and assessment in the schooling sector.

To improve implementation, the National Curriculum Statement was amended, with the amendments coming into effect in January 2012. A single comprehensive Curriculum and Assessment Policy document was developed for each subject to replace Subject Statements, Learning Programme Guidelines and Subject Assessment Guidelines in Grades R-12.

1.2 OVERVIEW

(a) The *National Curriculum Statement Grades R-12 (January 2012)* represents a policy statement for learning and teaching in South African schools and comprises the following:

(i) Curriculum and Assessment Policy Statements for each approved school subject;

(ii) The policy document, National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12; and

(iii) The policy document, National Protocol for Assessment Grades R-12 (January 2012).

(b) The *National Curriculum Statement Grades R-12 (January 2012)* replaces the two current national curricula statements, namely the

(i) Revised National Curriculum Statement Grades R-9, Government Gazette No. 23406 of 31 May 2002, and

(ii) National Curriculum Statement Grades 10-12 Government Gazettes, No. 25545 of 6 October 2003 and No. 27594 of 17 May 2005.

(c) The national curriculum statements contemplated in subparagraphs b(i) and (ii) comprise the following policy documents which will be incrementally repealed by the *National Curriculum Statement Grades R-12 (January 2012)* during the period 2012-2014:

(i) The Learning Area/Subject Statements, Learning Programme Guidelines and Subject Assessment Guidelines for Grades R-9 and Grades 10-12;

(ii) The policy document, National Policy on assessment and qualifications for schools in the General Education and Training Band, promulgated in Government Notice No. 124 in Government Gazette No. 29626 of 12 February 2007;

(iii) The policy document, the National Senior Certificate: A qualification at Level 4 on the National Qualifications Framework (NQF), promulgated in Government Gazette No.27819 of 20 July 2005;

(iv) The policy document, An addendum to the policy document, the National Senior Certificate: A qualification at Level 4 on the National Qualifications Framework (NQF), regarding learners with special needs, published in Government Gazette, No.29466 of 11 December 2006, is incorporated in the policy document, National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12; and

(v) The policy document, An addendum to the policy document, the National Senior Certificate: A qualification at Level 4 on the National Qualifications Framework (NQF), regarding the National Protocol for Assessment (Grades R-12), promulgated in Government Notice No.1267 in Government Gazette No. 29467 of 11 December 2006.

(d) The policy document, *National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12*, and the sections on the Curriculum and Assessment Policy as contemplated in Chapters 2, 3 and 4 of this document constitute the norms and standards of the *National Curriculum Statement Grades R-12.* It will therefore, in terms of *section 6A* of the *South African Schools Act, 1996 (Act No. 84 of 1996,)* form the basis for the Minister of Basic Education to determine minimum outcomes and standards, as well as the processes and procedures for the assessment of learner achievement to be applicable to public and independent schools.

1.3 GENERAL AIMS OF THE SOUTH AFRICAN CURRICULUM

(a) The *National Curriculum Statement Grades R-12* gives expression to the knowledge, skills and values worth learning in South African schools. This curriculum aims to ensure that children acquire and apply knowledge and skills in ways that are meaningful to their own lives. In this regard, the curriculum promotes knowledge in local contexts, while being sensitive to global imperatives.

(b) The National Curriculum Statement Grades R-12 serves the purposes of:

- equipping learners, irrespective of their socio-economic background, race, gender, physical ability or intellectual ability, with the knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country;
- providing access to higher education;
- facilitating the transition of learners from education institutions to the workplace; and
- providing employers with a sufficient profile of a learner's competences.

(c) The National Curriculum Statement Grades R-12 is based on the following principles:

- Social transformation: ensuring that the educational imbalances of the past are redressed, and that equal educational opportunities are provided for all sections of the population;
- Active and critical learning: encouraging an active and critical approach to learning, rather than rote and uncritical learning of given truths;
- High knowledge and high skills: the minimum standards of knowledge and skills to be achieved at each grade are specified and set high, achievable standards in all subjects;
- Progression: content and context of each grade shows progression from simple to complex;

- Human rights, inclusivity, environmental and social justice: infusing the principles and practices of social and environmental justice and human rights as defined in the Constitution of the Republic of South Africa. The National Curriculum Statement Grades R-12 is sensitive to issues of diversity such as poverty, inequality, race, gender, language, age, disability and other factors;
- Valuing indigenous knowledge systems: acknowledging the rich history and heritage of this country as important contributors to nurturing the values contained in the Constitution; and
- Credibility, quality and efficiency: providing an education that is comparable in quality, breadth and depth to those of other countries.

(d) The National Curriculum Statement Grades R-12 aims to produce learners that are able to:

- identify and solve problems and make decisions using critical and creative thinking;
- work effectively as individuals and with others as members of a team;
- organise and manage themselves and their activities responsibly and effectively;
- collect, analyse, organise and critically evaluate information;
- communicate effectively using visual, symbolic and/or language skills in various modes;
- use science and technology effectively and critically showing responsibility towards the environment and the health of others; and
- demonstrate an understanding of the world as a set of related systems by recognising that problem solving contexts do not exist in isolation.

(e) Inclusivity should become a central part of the organisation, planning and teaching at each school. This can only happen if all teachers have a sound understanding of how to recognise and address barriers to learning, and how to plan for diversity.

The key to managing inclusivity is ensuring that barriers are identified and addressed by all the relevant support structures within the school community, including teachers, District-Based Support Teams, Institutional-Level Support Teams, parents and Special Schools as Resource Centres. To address barriers in the classroom, teachers should use various curriculum differentiation strategies such as those included in the Department of Basic Education's *Guidelines for Inclusive Teaching and Learning* (2010).

1.4 TIME ALLOCATION

1.4.1 Foundation Phase

(a) The instructional time in the Foundation Phase is as follows:

SUBJECT	GRADE R (HOURS)	GRADES 1-2 (HOURS)	GRADE 3 (HOURS)
Home Language	10	8/7	8/7
First Additional Language		2/3	3/4
Mathematics	7	7	7
Life Skills • Beginning Knowledge • Creative Arts • Physical Education • Personal and Social Well-being	**6** (1) (2) (2) (1)	**6** (1) (2) (2) (1)	**7** (2) (2) (2) (1)
TOTAL	**23**	**23**	**25**

(b) Instructional time for Grades R, 1 and 2 is 23 hours and for Grade 3 is 25 hours.

(c) Ten hours are allocated for languages in Grades R-2 and 11 hours in Grade 3. A maximum of 8 hours and a minimum of 7 hours are allocated for Home Language and a minimum of 2 hours and a maximum of 3 hours for Additional Language in Grades 1-2. In Grade 3 a maximum of 8 hours and a minimum of 7 hours are allocated for Home Language and a minimum of 3 hours and a maximum of 4 hours for First Additional Language.

(d) In Life Skills Beginning Knowledge is allocated 1 hour in Grades R – 2 and 2 hours as indicated by the hours in brackets for Grade 3.

1.4.2 Intermediate Phase

(a) The instructional time in the Intermediate Phase is as follows:

SUBJECT	HOURS
Home Language	6
First Additional Language	5
Mathematics	6
Natural Sciences and Technology	3, 5
Social Sciences	3
Life Skills • Creative Arts • Physical Education • Personal and Social Well-being	4 (1, 5) (1) (1, 5)
TOTAL	**27, 5**

1.4.3 Senior Phase

(a) The instructional time in the Senior Phase is as follows:

SUBJECT	HOURS
Home Language	5
First Additional Language	4
Mathematics	4, 5
Natural Sciences	3
Social Sciences	3
Technology	2
Economic Management Sciences	2
Life Orientation	2
Creative Arts	2
TOTAL	**27, 5**

1.4.4 Grades 10-12

(a) The instructional time in Grades 10-12 is as follows:

SUBJECT	TIME ALLOCATION PER WEEK (HOURS)
Home Language	4.5
First Additional Language	4.5
Mathematics	4.5
Life Orientation	2
A minimum of any three subjects selected from **Group B** Annexure B, Tables B1-B8 of the policy document, *National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12,* subject to the provisos stipulated in paragraph 28 of the said policy document.	12 (3x4h)
TOTAL	**27, 5**

The allocated time per week may be utilised only for the minimum required NCS subjects as specified above, and may not be used for any additional subjects added to the list of minimum subjects. Should a learner wish to offer additional subjects, additional time must be allocated for the offering of these subjects.

SECTION 2: ECONOMIC AND MANAGEMENT SCIENCES

2.1 WHAT IS ECONOMIC AND MANAGEMENT SCIENCES?

The subject Economic and Management Sciences deals with the efficient and effective use of different types of private, public or collective resources to satisfy people's needs and wants. It reflects critically on the impact of resource exploitation on the environment and on people. It also deals with effective management of scarce resources in order to maximise profit.

Economic and Management Sciences is a practical subject that equips learners with real-life skills for personal development and the development of the community. The tasks set should contribute to personal development and should promote the idea of sustainable economic growth and the development of the community.

The table below indicates the main topics in the Economic and Management Sciences curriculum.

WEIGHTING OF CURRICULUM AND ECONOMIC AND MANAGEMENT SCIENCES TOPICS

Weighting of the curriculum	Topic
The economy (weighting of 30%)	1. History of money
	2. Need and wants
	3. Goods and services
	4. Inequality and poverty
	5. The production process
	6. Government
	7. The National Budget
	8. Standard of living
	9. Markets
	10. Economic systems
	11. The circular flow
	12. Price theory
	13.Trade unions
Financial literacy (weighting of 40%)	1. Savings
	2. Budgets
	3. Income and expenditure
	4. Accounting concepts
	5. Accounting cycle
	6. Source documents
	7. Financial management and keeping of records

Weighting of the curriculum	Topic
Entrepreneurship (weighting of 30%)	1. Entrepreneurial skills and knowledge
	2. Businesses
	3. Factors of production
	4. Forms of ownership
	5. Sectors of the economy
	6. Levels and functions of management
	7. Functions of a business
	8. Business plan

2.2 OVERVIEW OF CONTENT

An overview of the content of this subject entails the following:

- the needs and wants of different communities in societies;
- the nature, processes and production of goods and services, and business activities within the different sectors;
- financial management, accounting as a tool for management of a business, and record keeping;
- the influence of demand and supply, and pricing;
- the flow of money, goods and services between households, business and government, and the rights and responsibilities of the different role players in the economy;
- the way in which to achieve sustainable growth, reduce poverty and distribute wealth fairly, while still pursuing profitability;
- entrepreneurial skills and knowledge needed to manage self and the environment effectively;
- basic aspects of leadership and management;
- the role of savings in sustainable economic growth and development;
- trade unions and their influence in the economy;
- the importance of using resources sustainably, effectively and efficiently; and
- functioning of both formal and informal businesses.

2.3 TIME ALLOCATION OF ECONOMIC AND MANAGEMENT SCIENCES IN THE CURRICULUM

The teaching time for Economic and Management Sciences is two hours per week. As this subject involves the development of accounting skills of learners in Grades 8 and 9, one hour per week must be used for financial literacy in terms of the Annual Teaching Plan.

2.4 TEACHING AND LEARNING MATERIALS REQUIRED FOR ECONOMIC AND MANAGEMENT SCIENCES

1. Each learner should have

    a. a textbook; and

    b. a calculator.

2. Learners in Grades 8 and 9 should each have one Cash Journal exercise book, one General Ledger exercise book and a normal exercise book.

3. Grade 7 learners should have a normal exercise book.

4. Teachers should have a textbook with a teacher guide.

SECTION 3: TERM PLANS

3.1 OVERVIEW OF TOPICS

Topic	Grade	Content
The economy	7	History of money; needs and wants; goods and services; the production process; and inequality and poverty
	8	Government; the National Budget; standard of living; and markets
	9	Economic systems; the circular flow; price theory; and trade unions
Financial literacy	7	Savings; budgets, income and expenses; and accounting concepts
	8	Accounting concepts; accounting cycle; source documents; Cash Receipts Journal and Cash Payments Journal of a service business; effects of cash transactions on the accounting equation; General Ledger and Trial Balance
	9	Cash Receipts Journal and Cash Payment Journal of a sole trader; posting to the General Ledger; preparing a Trial Balance; recording transactions in the Debtors Journal, Creditors Journal; posting to the Debtors Ledger and Creditors Ledger
Entrepreneurship	7	The entrepreneur; starting a business; businesses; and an Entrepreneur's Day
	8	Factors of production; forms of ownership; levels of management; and functions of management
	9	Sectors of the economy; functions of a business; and a business plan

3.2 ANNUAL TEACHING PLAN

GRADE 7, TERM 1

Week (2 hours per week)	Topic	Content
Weeks 1 – 3	**The economy:** History of money	Traditional societies; bartering; promissory notes; coins; paper money; electronic banking; the role of money
Weeks 4 – 5	**The economy:** Needs and wants	Basic needs of individuals, families, communities and countries; primary and secondary needs; unlimited wants; limited resources to satisfy needs and wants
Weeks 6 – 7	**The economy:** Goods and services	Goods and services; examples of goods and services; producers and consumers; the role of households as producers and consumers; using goods and services efficiently and effectively; how to recycle and reuse goods to satisfy needs and wants
Weeks 8 – 10	**Entrepreneurship:** Businesses	Formal and informal businesses; types of businesses (trading, manufacturing and service) that are both formal and informal; advantages and disadvantages of formal and informal businesses; the role of formal and informal businesses as producers and consumers; the effect of natural disasters and health epidemics on formal and informal businesses

Notes:

1. Formal assessment for term 1 consists of two tasks: an assignment (40%) and a controlled test (60%).

2. The controlled test must include all topics covered in term 1.

3. It is compulsory to complete all the topics as indicated in the teaching plan.

4. When teaching these topics, the context of the school should be considered.

GRADE 7, TERM 2

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the first term; give learners an overview of what will be taught during the second term
Weeks 2 – 3	**Financial literacy:** Accounting concepts	Capital; assets; liability; income; expenses; profit; losses; budgets; savings; banking; financial records; transactions
Weeks 4 – 6	**Financial literacy:** Income and expenses	Personal income; personal expenses; types of personal income; personal statement of net worth; types of income that businesses receive; types of expenses that businesses have; savings and investments in businesses
Weeks 7 – 8	**Financial literacy:** Budgets	Definition of a budget; income; expenditure; a personal budget; business budget
Weeks 9 – 10	**Mid-year examination**	Mid-year examination must be based on the work covered in terms 1 and 2

Notes:

1. Formal assessment for term 2 consists of two tasks: a case study (40%) and a mid-year examination (60%).
2. The mid-year examination must include all topics covered in term 1 and term 2.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 7, TERM 3

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the second term; give learners an overview of what will be taught during the third term
Weeks 2 – 3	**Entrepreneurship:** The entrepreneur	Definition of an entrepreneur; characteristics of an entrepreneur; skills of an entrepreneur; entrepreneurial actions of buying, selling, producing and making a profit
Weeks 4 – 5	**Entrepreneurship:** Starting a business	Needs and wants of consumers; analysis of strengths, weaknesses, opportunities, threats (SWOT); setting goals; achieving goals; the concept of advertising; media used in advertising; principles of advertising; budget for Entrepreneur's Day; use of recycled material; simple cost calculation – variable cost, fixed cost, selling price
Weeks 6 – 7	**Entrepreneurship:** Entrepreneur's Day	Hosting of Entrepreneur's Day; income and expenditure statement
Weeks 8 – 10	**The economy:** Inequality and poverty	Causes of socio-economic imbalances; inequality in South Africa; education and skills to fight inequality and injustice; urban and rural challenges; creating sustainable job opportunities

Notes:

1. Formal assessment for term 3 consists of two tasks: a project (40%) and a controlled test (60%).

2. The controlled test must include all topics covered in term 3.

3. It is compulsory to complete all the topics as indicated in the teaching plan.

4. When teaching these topics, the context of the school should be considered.

GRADE 7, TERM 4

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the third term; give learners an overview of what will be taught during the fourth term
Weeks 2 – 4	**The economy:** The production process	Definition of production; inputs and outputs; sustainable use of resources; meaning of economic growth; meaning of productivity; the effect of productivity on the economic growth; technology in the production process; contribution of technology to improving productivity and economic growth
Weeks 5 – 7	**Financial literacy:** Savings	Personal savings; purpose of savings; history of banks; the role of banks; services offered by banks; opening a savings account at a bank; community savings schemes; financial organisations; financial institutions and organisations promoting entrepreneurship
Weeks 8 – 9	**Examination preparations**	Revise the work covered throughout the year; study techniques; examination writing skills
Week 10	**End-of-year examination**	

Notes:

1. Formal assessment for term 4 consists of an end-of-year examination.
2. The end-of-year examination must include all topics covered in term 1, term 2, term 3 and term 4.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

SBA	EXAMINATION
Term 1: 100	**Written examination: 150**
Term 2: 100	
Term 3: 100	
Convert to 40%	**Convert to 60%**
Year mark: SBA + end-of-year examination = 100%	

GRADE 8, TERM 1

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise Grade 7 work; give learners an overview of what will be taught during the first term
Weeks 2 – 3	**The economy:** Government	Meaning of government; different levels of government; roles of the different levels of government in respect of households in the use of resources and services (both as consumer and producer); roles of the different levels of government in respect of businesses in the use of resources and services (both as consumer and producer)
Weeks 4 – 5	**The economy:** National Budget	Government revenue: direct tax, indirect tax; government expenditure on services such as education, health, housing, social grants, transport, security, etc.; the influence of the National Budget on growth and redressing of economic inequalities
Week 6	**The economy:** Standard of living	Lifestyles; self-sufficient societies; modern societies; rural societies; impact of development on the environment; unemployment; productive use of resources to promote a healthy environment
Weeks 7 – 8	**Financial literacy:** Accounting concepts	Sole trader; debit; credit; capital; owner's equity; income; expenses; profit; losses; transactions; liability; assets; banking; cash receipts; cash payments; subsidiary journals; accounting equation: assets = owner's equity + liability (A = OE + L)
Weeks 9 – 10	**Financial literacy:** Source documents	Receipts; deposit slips; cash register slips (till slips); cheques; cheque counter foils; bank statements; cash invoices

Notes:

1. Formal assessment for term 1 consists of two tasks: a data response (40%) and a controlled test (60%).
2. The controlled test must include all topics covered in term 1.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 8, TERM 2

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the first term; give learners an overview of what will be taught during the second term
Weeks 2 – 3	**Financial literacy:** Overview of the accounting cycle	Transactions; source documents; subsidiary journals; General Ledger; Trial Balance; Income Statement; Balance Sheet; introduction of the Cash Journals of a service business – their purpose and importance
Weeks 4, 5, 6, 7, 8 (1 hour per week on Accounting)	**Financial literacy:** Cash Receipts Journal (services)	Concept of a Cash Receipts Journal (CRJ) of a service business; formats and uses of the columns in the CRJ; source documents used to complete the CRJ; entering of cash transactions in the CRJ; closing off the CRJ; effect of cash transactions on the accounting equation
Weeks 4, 5, 6 (1 hour per week on Entrepreneurship)	**Entrepreneurship:** Factors of production	Capital – borrowed and own capital; labour – unskilled, semi-skilled and skilled labour; role of workers in the business; fair employment practices; natural resources; entrepreneurship; remuneration of the factors of production
Weeks 7, 8 (1 hour per week on The economy)	**The economy:** Markets	Types of markets – goods and services market; factor market (labour and financial markets)
Weeks 9 – 10	**Mid-year examination**	Mid-year examination must be based on work covered in terms 1 and 2

Notes:

1. Formal assessment for term 2 consists of two tasks: a project (40%) and a mid-year examination (60%).
2. The mid-year examination must include all topics covered in term 1 and term 2.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 8, TERM 3

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the second term; give learners an overview of what will be taught during the third term
Weeks 2 – 3	**Financial literacy:** Cash Receipts Journal (service)	Entering of cash transactions in the Cash Receipts Journal (CRJ); closing off of the CRJ; effect of cash transactions on the accounting equation
Weeks 4, 5, 6, 7, 8, 9, 10 (1 hour per week on Accounting)	**Financial literacy:** Cash Payments Journal (service)	Concept of a Cash Payments Journal (CPJ) of a service business; formats and uses of the columns in the CPJ; source documents used to complete a CPJ; entering of cash transactions in the CPJ; closing off of the CPJ; effect of cash transactions on the accounting equation; entering combined transactions in the CRJ and CPJ; closing off of CRJ and CPJ; effect of cash transactions on the accounting equation
Weeks 4, 5, 6, 7, 8, 9, 10 (1 hour per week on Entrepreneurship)	**Entrepreneurship:** Forms of ownership	Sole traders; partnerships; close corporations; private and public companies; characteristics; advantages and disadvantages; their role in sustainable job creation; role in sustainable use of natural resources

Notes:

1. Formal assessment for term 3 consists of two tasks: a case study (40%) and a controlled test (60%).
2. The controlled test must include all topics covered in term 3.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 8, TERM 4

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the third term; give learners an overview of what will be taught during the fourth term
Weeks 2, 3, 4, 5, 6 (1 hour per week on Entrepreneurship)	**Entrepreneurship:** Levels and functions of management	Different levels of management; management tasks such as planning, organising, leading, and controlling; characteristics of good management; different styles of management – autocratic style, permissive or free-reign style (laissez-fair), democratic or participatory style
Weeks 2, 3, 4, 5, 6, 7, 8, 9 (1 hour per week on Accounting)	**Financial literacy:** General Ledger and trial balance (service)	The double entry-principle; the "T" accounts; format of the General Ledger; sections within the General Ledger; opening accounts in the General Ledger; posting/recording of transactions from the CRJ and CPJ of the service business to the General Ledger, balancing of the General Ledger; preparing of a Trial Balance of a service business
Weeks 7, 8, 9 (1 hour per week on examination preparations)	**Examination preparations**	Revise work covered throughout the year; study techniques; examination writing skills
Week 10	**End-of-year examinations**	

Notes:

1. Formal assessment for term 4 consists of an end-of-year examination.

2. The end-of-year examination must include all topics covered in term 1, term 2, term 3 and term 4.

3. It is compulsory to complete all the topics as indicated in the teaching plan.

4. When teaching these topics, the context of the school should be considered.

SBA	EXAMINATION
Term 1: 100 **Term 2: 100** **Term 3: 100**	**Written examination: 150**
Convert to 40%	**Convert to 60%**
Year mark: SBA + end-of-year examination = 100%	

GRADE 9, TERM 1

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise Grade 8 work; give learners an overview of what will be taught during the first term
Weeks 2, 3, 4 (1 hour per week for Accounting)	**Financial literacy:** Cash Receipts Journal and Cash Payments Journal (sole trader)	Cash transactions of a trading business; effect of cash transactions on the accounting equation
Weeks 2, 3, 4 (1 hour per week for The economy)	**The economy:** Economic systems	The three major economic systems: a planned economy, market economy and mixed economy; origin of each system; advantages and disadvantages of each economic system; characteristics of each economic system; the global economy
Weeks 5, 6, 7, 8, 9, 10 (1 hour per week for Accounting)	**Financial literacy:** General Ledger and trial balance (sole trader)	Posting of cash transactions of a trading business from Cash Receipts Journal (CRJ) and Cash Payments Journal (CPJ) to General Ledger; preparing of a trial balance of a trading business
Weeks 5, 6, 7, 8, 9, 10 (1 hour per week for The economy)	**The economy:** The circular flow	The participants in the circular flow of a closed economy; flow of goods and services, money and factors of production in the circular flow of a closed economy; illustrate by using a flow diagram

Notes:

1. Formal assessment for term 1 consists of two tasks: an assignment (40%) and a controlled test (60%).
2. The controlled test must include all topics covered in term 1.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 9, TERM 2

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the first term; give learners an overview of what will be taught during the second term
Weeks 2, 3, 4, 5, 6, 7 (1 hour per week for Accounting)	**Financial literacy:** Credit transactions – debtors	Credit sales; debtors; National Credit Act; debtors allowance; accounting cycle; recording of transactions to Debtors Journal (DJ); Debtors Allowance Journal (DAJ); recording of receipts from debtors in the Cash Receipts Journal (CRJ)
Weeks 2, 3, 4, 5, 6, 7 (1 hour per week for The economy)	**The economy:** Price theory	Law of demand, demand schedule and graphical illustration of the demand curve; law of supply, supply schedule and graphical illustration of the supply curve; equilibrium price and quantity; change in quantity demanded; change in quantity supplied; increase and decrease in demand; increase and decrease in supply; graphical illustration of the change in demand and the change in supply
Weeks 8 – 9	**Entrepreneurship:** Sectors of the economy	The primary sector, the secondary sector, the tertiary sector; types of businesses found in the three sectors; the interrelationship of the three sectors; sustainable use of resources in the three sectors; the role of the three sectors in the economy; types of skills required in each sector
Week 10	**Mid-year examination**	Mid-year examination must be based on work covered in terms 1 and 2

Notes:

1. Formal assessment for term 2 consists of two tasks: a class test or data response (40%) and a mid-year examination (60%).
2. The mid-year examination must include all topics covered in term 1 and term 2.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 9, TERM 3

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the second term; give learners an overview of what will be taught during the third term
Weeks 2, 3, 4, 5 (1 hour per week for The economy)	**The economy:** Trade unions	Concept of trade unions; brief historical development of trade unions; the roles and responsibilities of trade unions in South Africa; effect of trade unions in businesses; contribution of trade unions to sustainable growth and development
Weeks 2, 3, 4, 5 (1 hour per week for Accounting)	**Financial literacy:** Credit transactions – debtors	Posting to the Debtors Ledger and General Ledger; effect of credit transactions on the accounting equation
Weeks 6, 7, 8 (1 hour per week for Accounting)	**Financial literacy:** Credit transactions – creditors	Creditors; creditors allowance; accounting cycle; recording of transactions in the Creditors Journal (CJ) and Creditors Allowance Journal (CAJ)
Weeks 6, 7, 8 (1 hour per week for Entrepreneurship)	**Entrepreneurship:** Functions of a business	Functions of a business: administration, purchasing, marketing, finances, public relations, human resources, production, general management, and risk management; characteristics of the business functions; role and importance of the business functions
Weeks 9 – 10	**Financial literacy:** Credit transactions – creditors	Recording of payments to creditors in the Cash Payments Journal (CPJ); posting to the Creditors Ledger and General Ledger; effect of credit transactions on the accounting equation

Notes:

1. Formal assessment for term 3 consists of two tasks: a project (40%) and a controlled test (60%).
2. The controlled test must include all topics covered in term 3.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

GRADE 9, TERM 4

Week (2 hours per week)	Topic	Content
Week 1	**Revision**	Revise the work covered in the third term; give learners an overview of what will be taught during the fourth term
Weeks 2, 3, 4, 5, 6, 7 (1 hour per week for Financial literacy)	**Financial literacy:** Transactions – cash and credit	Recording of cash and credit transactions of a sole trader in the subsidiary journals; posting to the Debtors Journal (DJ), Debtors Allowance Journal (DAJ), Creditors Journal (CJ), Creditors Allowance Journal (CAJ) and General Ledger; preparing of a trial balance
Weeks 2, 3, 4, 5, 6, 7 (1 hour per week for Entrepreneurship)	**Entrepreneurship:** Business plan	Concept of a business plan; components of a business plan; format of a business plan [the front cover, table of contents, description of the product or services offered by the business, goals of the business, the business owner, production plan, marketing plan, management plan, SWOT (strengths, weaknesses, opportunities, threats) analysis and conclusion]; financial plan (fixed and variable costs, break-even points, mark-up on sales, profit percentage)
Weeks 8 – 9	**Examination preparation**	Revise work covered throughout the year; study techniques; examination writing skills
Week 10	**End-of-year examination**	

Notes:

1. Formal assessment for term 4 consists of an end-of-year examination.
2. The end-of-year examination must include all topics covered in term 1, term 2, term 3 and term 4.
3. It is compulsory to complete all the topics as indicated in the teaching plan.
4. When teaching these topics, the context of the school should be considered.

SBA	EXAMINATION
Term 1: 100 **Term 2: 100** **Term 3: 100**	**Written examination: 150**
Convert to 40%	**Convert to 60%**
Year mark: SBA + end-of-year examination = 100%	

SECTION 4: ASSESSMENT IN ECONOMIC AND MANAGEMENT SCIENCES

4.1 INTRODUCTION

Assessment is a continuous planned process of identifying, gathering and interpreting information about the performance of learners, using various forms of assessment. It involves four steps: generating and collecting evidence of achievement; evaluating this evidence; recording the findings; and using this information to understand and thereby assist the learner's development in order to improve the process of learning and teaching.

Assessment is integral to teaching and learning. Assessment informs teachers about learners' specific needs. It provides teachers with feedback that enables them to adjust their teaching strategies. Assessment also provides learners with feedback, allowing them to monitor their own achievement. Assessment that takes note of learners' needs is called "assessment for learning" (informal assessment). Assessment for learning is developmental. It helps learners improve and progress by informing them of their strengths and weaknesses. When the focus of assessment is on the results of learning, assessment is referred to as "assessment of learning" (formal assessment). Assessment of learning usually takes place at the end of a period of work, such as a topic, term or year. Assessment of learning is typically used for promotion and certification purposes. Both assessment for learning and assessment of learning strategies should be used during the school year.

Assessment in Economic and Management Sciences focuses on the knowledge, skills and values inherent in the activities of production, consumption, exchange and making meaningful and informed financial decisions in economic and social environments.

Economic and Management Sciences covers valuable skills such as economic, entrepreneurship, financial and managerial skills that prepare learners for success in different economic and business environments. Teachers must consider all these skills when planning teaching, learning and assessment activities.

4.2 INFORMAL ASSESSMENT OR DAILY ASSESSMENT

Assessment for learning has the purpose of continuously collecting information on learners' achievement, which can be used to improve their learning.

Informal assessment is a daily monitoring of learners' progress. This is done through observations, discussions, practical demonstrations, learner-teacher conferences, informal classroom interactions, etc. Informal assessment may be as simple as stopping during the lesson to observe learners or to discuss with learners how their learning is progressing. Informal assessment should be used to provide feedback to the learners and to inform planning for teaching, it does not need to be recorded. It should not be seen as separate from learning activities taking place in the classroom. Learners or teachers can mark these assessment tasks and give feedback to learners, thereby improving teaching and learning.

Self-assessment and peer assessment actively involve learners in assessment. This is important, as it allows learners to learn from and reflect on their own performance. The results of the informal daily assessment tasks are not formally recorded, unless the teacher wishes to do so. The results of daily assessment tasks are not taken into account for promotion and certification purposes.

4.3 FORMAL ASSESSMENT

All assessment tasks that make up a formal programme of assessment for the year are regarded as formal assessment. The teacher marks and records all formal assessment tasks formally for progression and certification purposes. All formal assessment tasks are subject to moderation for the purpose of quality assurance, thus ensuring that appropriate standards are maintained.

Formal assessment provides teachers with a systematic way of evaluating how well learners are progressing in a grade and in a particular subject. Examples of formal assessments include tests, examinations, practical tasks, projects, oral presentations, demonstrations, performances, etc. Formal assessment tasks form part of a year long formal Programme of Assessment in each grade and subject.

4.3.1 Summary of formal assessments expected in Grades 7 to 9

Formal assessment task requirement for Economic and Management Sciences are as follows:

Grade	Formal assessments	SBA (40%)	Final examination (60%)	Total
7	• 2 formal assessments • 1 formal assessment – project • 2 tests • Mid-year examination • End-of-year examination	Refer to Programme of Assessment	Refer to Programme of Assessment	**100**
8	• 2 formal assessments • 1 formal assessment – project • 2 tests • Mid-year examination • End-of-year examination	Refer to Programme of Assessment	Refer to Programme of Assessment	**100**
9	• 2 formal assessments • 1 formal assessment – project • 2 tests • Mid-year examination • End-of-year examination	Refer to Programme of Assessment	Refer to Programme of Assessment	**100**

4.3.2 Formal assessment requirements for Economic and Management Sciences

Formal assessment for the Senior Phase comprises three formal assessment tasks, two tests, and two examinations. The total number of formal assessment tasks per year for the Senior Phase is seven. Learners are required to do two formal assessment tasks per term in the first, second and third term and one formal task in the fourth term. Of the two formal assessment tasks per term, one assessment task must be a test or an examination.

(a) Tasks

Tasks should cover the content and concepts according to the Annual Teaching Plan. They should include a variety of activities and strategies that assess knowledge and skills. Some examples of formal assessment strategies are listed below. These assessment strategies may form the focus of specific tasks or they may be used together as part of a task.

In Economic and Management Sciences, the following forms of assessment are preferred, although they are not the only ones that you may use:

- projects;
- tests (both class tests and controlled tests);
- data responses;
- examinations;
- oral presentations;
- case studies;
- assignments; and
- posters.

When scheduling a task, the resource needs of a task must be considered. For example, you may want to schedule a task on the National Budget at the time when the Minister of Finance makes his presentation. Alternatively, you may want to link tasks to other significant or special days and events. You should allow time for research, if necessary – perhaps during holidays or long weekends – so that all learners can go to a library or interview people, or do whatever the task requires.

(b) Tests and examinations

- Test should be written in terms 1 and 3, a mid-year examination in term 2, and an end-of-year examination in term 4.
- Tests should cover the work completed in that particular term. The mid-year examination should cover work completed in terms 1 and 2, and the end-of-year examination should be based on the whole year's work.
- In term 2, the mid-year examination must cover work done in terms 1 and 2. In term 4, the final examination should cover work done throughout the whole year.
- A test should be 60 minutes long.
- Tests and examinations may include a variety of assessment styles such as multiple-choice questions, one-line answers, true-and-false questions, filling in the missing word, written paragraphs, labelling diagrams and doing calculations.
- Tests and examinations must be completed under strictly controlled conditions.
- The end-of-year examination for Grades 7 and 8 is set, marked and moderated internally.
- The end-of-year examination for Grade 9 is set externally, and marked and moderated internally.

Tests and examinations must cater for a range of cognitive levels. The following is the suggested weighting for the Senior Phase:

Cognitive levels	Activity	Percentage of task
Lower order	Assessing knowledge and remembering	30%
Middle order	Assessing understanding and application	40%
Higher order	Analysing, evaluating and creating	30%

The end-of-year examinations must be structured according to the suggested format below. It is recommended that the control tests during the year be structured as far as possible according to the end-of-year examinations. This will not only help learners to gain confidence, but will also help them to develop and consolidate test or examination writing skills and techniques needed to successfully complete future tests or examination papers.

Grade 7

Section A: 40 marks (20X2=40)	Section B: 30 marks	Section C: 50 marks	Section D: 30 marks
Covers all the topics Types of questions to include in this section: 1. Multiple Choice 2. Fill in the missing word 3. True or False 4. Matching column A to column B 5. Underline the correct word Use a combination of any **four** types for example: 1. Multiple Choice (5) 2. True or False (5) 3. Underline the correct word (5) 4. Match column A to column B (5) Award 2 marks for each correct answer: Total Marks 20 x 2 = 40	Topic: The Economy Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be distributed evenly amongst the questions as long as the total adds up to 30 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Diagrams 4. Cartoons 5. Graphs 6. Case studies	Topic: Financial Literacy Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be evenly distributed amongst the questions as long as the total adds up to 50 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Case studies 4. Scenarios	Topic: Entrepreneurship Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be evenly distributed amongst the questions as long as the total adds up to 30 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Case studies 4. Scenarios 5. Diagrams 6.Cartoons

Note

Total marks for the end-of-year examination for Grade 7 is **150** marks.

Information provided in the texts for case studies and scenarios must be relevant, current, age-appropriate and learner-friendly.

Use a variation of the types of questions selected from each section.

Grade 8 and 9

Section A: 60 marks (30X2=60)	Section B: 40marks	Section C: 60 marks	Section D: 40 marks
Covers all the topics Types of questions to include in this section: 1. Multiple Choice 2. Fill in the missing word 3. True or False 4. Matching column A to column B 5. Underline the correct word Use a combination of any **four** types for example: 1. Multiple Choice (10) 2. True or False (5) 4. Match column A to column B (10) 5. Fill in the missing word (5) Award 2 marks for each correct answer: Total Marks 30 x 2 = 60	Topic: The Economy Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be distributed evenly amongst the questions as long as the total adds up to 40 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Diagrams 4. Cartoons 5. Graphs 6. Case studies	Topic: Financial Literacy Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be evenly distributed amongst the questions as long as the total adds up to 60 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Case studies pertaining to the practical recording of cash/credit transactions in subsidiary journals, posting to the General Ledger and preparing a Trial Balance	Topic: Entrepreneurship Include **two** to **three** questions on the content as per the Annual Teaching Plan. Each question can have sub questions relating to the content being assessed. The allocation of marks do not have to be evenly distributed amongst the questions as long as the total adds up to 40 marks. Types of questions that can be included in this section: 1. Short answer questions 2. Paragraph type questions 3. Case studies 4. Scenarios 5. Diagrams 6. Cartoons

Note

Total marks for the end-of-year examination for Grade 8 and 9 is **200** marks.

Information provided in the texts for case studies and scenarios must be relevant, current, age-appropriate and learner-friendly.

Use a variation of the types of questions selected from each section.

4.4 PROGRAMME OF ASSESSMENT

The Programme of Assessment is designed to spread formal assessment tasks in all subjects in a school throughout a term. For promotion purposes, the year mark (School-Based Assessment – SBA) is added to the end-of-year examination mark.

The total mark for each grade in the Senior Phase is weighted as follows:

- year mark (SBA mark) 40% – terms 1 to 3; and
- fourth term examination mark 60%.

Economic and Management Sciences, Grade 7

Programme of Assessment

	TERM 1		TERM 2		TERM 3		TERM 4
Form of assessment	**Assignment**	**Controlled test**	**Case study**	**Mid-year examination**	**Project**	**Controlled test**	**Final examination**
Tool(s) of assessment	Rubric/ memo	Memo	Rubric/ memo	Memo	Rubric/ checklist	Memo	Memo
TOTAL MARKS	30 marks	50 marks	30 marks	75 marks	50 marks	100 marks	150 marks
Date of completion	Week 5	Week 10	Week 6	Week 9	Week 6	Week 10	Week 10
Time allocation		60 minutes		60 minutes		90 minutes	120 minutes

Economic and Management Sciences, Grade 8

Programme of Assessment

	TERM 1		TERM 2		TERM 3		TERM 4
Form of assessment	**Data response**	**Controlled test**	**Project**	**Mid-year examination**	**Case study**	**Controlled test**	**Final examination**
Tool(s) of assessment	Rubric/ memo	Memo	Rubric/ checklist	Memo	Rubric/ memo	Memo	Memo
TOTAL MARKS	30 marks	50 marks	50 marks	75 marks	30 marks	100 marks	150 marks
Date of completion	Week 5	Week 10	Week 6	Week 9	Week 7	Week 10	Week 10
Time allocation		60 minutes		60 minutes		60 minutes	120 minutes

Economic and Management Sciences, Grade 9 –

Programme of Assessment

	TERM 1		TERM 2		TERM 3		TERM 4
Form of assessment	**Assignment**	**Controlled test**	**Class test / Data response**	**Mid-year examination**	**Project**	**Controlled test**	**Final examination**
Tool(s) of assessment	Rubric/ memo	Memo	Memo	Memo	Rubric/ memo	Memo	Memo
TOTAL MARKS	50 marks	100 marks	50 marks	100 marks	50 marks	100 marks	200 marks
Date of completion	Week 5	Week 10	Week 7	Week 9	Week 5	Week 10	Week 10
Time allocation		60 minutes		60 minutes		60 minutes	120 minutes

The forms of assessment indicated in the Programme of Assessment above may be substituted for any other form of assessment, with the exception of controlled tests and the final examination.

4.5 RECORDING AND REPORTING

Recording is a process by which the teacher documents the level of a learner's performance in a specific assessment task. It indicates learner progress towards the achievement of the knowledge as prescribed in the *National Curriculum and Assessment Policy Statement*. Records of learner performance should provide evidence of the learner's conceptual progression within a grade and her or his readiness to progress or be promoted to the next grade. Records of learner performance should also be used to verify the progress made by teachers and learners in the teaching and learning process.

Reporting is a process of communicating learner performance to learners, parents, schools, and other stakeholders. Learner performance can be reported in a number of ways. These include report cards, parents' meetings, school visitation days, parent-teacher conferences, phone calls, letters, class or school newsletters, etc. Marks in all subjects must be recorded in percentages. Seven levels of competence have been described for each subject listed for Grades R – 12. The various achievement levels and their corresponding percentage bands are shown in the table on the next page .

CODES AND PERCENTAGES FOR RECORDING AND REPORTING

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

Note: The seven-point scale should have clear descriptors that give detailed information for each level. Teachers will record actual marks against the task by using a record sheet and report percentages against the subject on the learners' report cards.

4.6 MODERATION OF ASSESSMENT

Moderation refers to the process that ensures that the assessment tasks are fair, valid and reliable. Moderation should be implemented at school, district, provincial and national levels. Comprehensive and appropriate moderation practices must be in place for the quality assurance of all subject assessments.

4.6.1 Formal assessment

- Grades 7 and 8 tasks are moderated internally. The subject advisor must moderate a sample of these tasks during school visits to verify the standard of internal moderation.
- Provincial subject advisors must moderate Grade 9 tasks and the provincial department of education will monitor the process.

4.7 GENERAL

This document should be read in conjunction with:

4.7.1 *National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R – 12*; and

4.7.2 The policy document, *National Protocol for Assessment Grades R – 12.*