education

Department:
Education
REPUBLIC OF SOUTH AFRICA

NATIONAL CERTIFICATES (VOCATIONAL)

ASSESSMENT GUIDELINES

MARKETING

NQF Level 4

September 2007

MARKETING – LEVEL 4

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SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

This document provides the lecturer with guidelines to develop and implement a coherent, integrated assessment system for Marketing in the National Certificates (Vocational). It must be read with the *National Policy Regarding Further Education and Training Programmes: Approval of the Documents, Policy for the National Certificates (Vocational) Qualifications at Levels 2 to 4 on the National Qualifications Framework (NQF)*. This assessment guideline will be used for National Qualifications Framework Levels 2-4.

This document explains the requirements for the internal and external subject assessment. The lecturer must use this document with the *Subject Guidelines: Marketing* to prepare for and deliver Marketing. Lecturers should use a variety of resources and apply a range of assessment skills in the setting, marking and recording of assessment tasks.

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

1 ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

Assessment in the National Certificates (Vocational) is underpinned by the objectives of the National Qualifications Framework (NQF). These objectives are to:

- Create an integrated national framework for learning achievements.
- Facilitate access to and progression within education, training and career paths.
- Enhance the quality of education and training.
- Redress unfair discrimination and past imbalances and thereby accelerate employment opportunities.
- Contribute to the holistic development of the student by addressing:
  - social adjustment and responsibility;
  - moral accountability and ethical work orientation;
  - economic participation; and
  - nation-building.

The principles that drive these objectives are:

- ***Integration***

To adopt a unified approach to education and training that will strengthen the human resources development capacity of the nation.

- ***Relevance***

To be dynamic and responsive to national development needs.

- ***Credibility***

To demonstrate national and international value and recognition of qualification and acquired competencies and skills.

- ***Coherence***

To work within a consistent framework of principles and certification.

- ***Flexibility***

To allow for creativity and resourcefulness when achieving Learning Outcomes, to cater for different learning styles and use a range of assessment methods, instruments and techniques.

- ***Participation***

To enable stakeholders to participate in setting standards and co-ordinating the achievement of the qualification.

- ***Access***

To address barriers to learning at each level to facilitate students' progress.

- ***Progression***

To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

- ***Portability***

To enable students to transfer credits of qualifications from one learning institution and/or employer to another institution or employer.

- ***Articulation***

To allow for vertical and horizontal mobility in the education system when accredited pre-requisites have been successfully completed.

- ***Recognition of Prior Learning***

To grant credits for a unit of learning following an assessment or if a student possesses the capabilities specified in the outcomes statement.

- ***Validity of assessments***

To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:

  - clearly stating the outcome to be assessed;
  - selecting the appropriate or suitable evidence;
  - matching the evidence with a compatible or appropriate method of assessment; and
  - selecting and constructing an instrument(s) of assessment.

- ***Reliability***

To assure assessment practices are consistent so that the same result or judgment is arrived at if the assessment is replicated in the same context. This demands consistency in the interpretation of evidence; therefore, careful monitoring of assessment is vital.

- ***Fairness and transparency***

To verify that no assessment process or method(s) hinders or unfairly advantages any student. The following could constitute unfairness in assessment:

  - Inequality of opportunities, resources or teaching and learning approaches
  - Bias based on ethnicity, race, gender, age, disability or social class
  - Lack of clarity regarding Learning Outcome being assessed
  - Comparison of students' work with other students, based on learning styles and language

- ***Practicability and cost-effectiveness***

To integrate assessment practices within an outcomes-based education and training system and strive for cost and time-effective assessment.

2 ASSESSMENT FRAMEWORK FOR VOCATIONAL QUALIFICATIONS

The assessment structure for the National Certificates (Vocational) qualification is as follows:

2.1 Internal continuous assessment (ICASS)

Knowledge, skills values, and attitudes (SKVAs) are assessed throughout the year using assessment instruments such as projects, tests, assignments, investigations, role-play and case studies. The internal continuous assessment (ICASS) practical component is undertaken in a real workplace, a workshop or a "Structured Environment". This component is moderated internally and externally quality assured by Umalusi. All internal continuous assessment (ICASS) evidence is kept in a Portfolio of Evidence (PoE) and must be readily available for monitoring, moderation and verification purposes.

2.2 External summative assessment (ESASS)

The external summative assessment is either a single or a set of written papers set to the requirements of the Subject Learning Outcomes. The Department of Education administers the theoretical component according to relevant assessment policies.

A compulsory component of external summative assessment (ESASS) is the **integrated summative assessment task (ISAT).** This assessment task draws on the students' cumulative learning throughout the year. The task requires **integrated application of competence** and is executed under strict assessment conditions. The task should take place in a simulated or "Structured Environment". The integrated summative assessment task (ISAT) is the most significant test of students' ability to apply acquired knowledge.

The integrated assessment approach allows students to be assessed in more than one subject with the same integrated summative assessment task (ISAT).

External summative assessments will be conducted annually between October and December, with provision made for supplementary sittings.

3 MODERATION OF ASSESSMENT

3.1 Internal moderation

Assessment must be moderated according to the internal moderation policy of the Further Education and Training (FET) college. Internal college moderation is a continuous process. The moderator's involvement starts with the planning of assessment methods and instruments and follows with continuous collaboration with and support to the assessors. Internal moderation creates common understanding of Assessment Standards and maintains these across vocational programmes.

3.2 External moderation

External moderation is conducted by the Department of Education, Umalusi and, where relevant, an Education and Training Quality Assurance (ETQA) body according to South African Qualifications Authority (SAQA) and Umalusi standards and requirements.

The external moderator:

- monitors and evaluates the standard of all summative assessments;
- maintains standards by exercising appropriate influence and control over assessors;
- ensures proper procedures are followed;
- ensures summative integrated assessments are correctly administered;
- observes a minimum sample of ten (10) to twenty-five (25) percent of summative assessments;
- gives written feedback to the relevant quality assuror; and
- moderates in case of a dispute between an assessor and a student.

Policy on inclusive education requires that assessment procedures be customised for students who experience barriers to learning, and supported to enable these students to achieve their maximum potential.

4 PERIOD OF VALIDITY OF INTERNAL CONTINUOUS ASSESSMENT (ICASS)

The period of validity of the internal continuous assessment mark is determined by the *National Policy on the Conduct, Administration and Management of the Assessment of the National Certificates (Vocational).*

The internal continuous assessment (ICASS) must be re-submitted with each examination enrolment for which it constitutes a component.

5 ASSESSOR REQUIREMENTS

Assessors must be subject specialists and should ideally be declared competent against the standards set by the ETDP SETA. If the lecturer conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process to ensure the quality and integrity of assessments.

6 TYPES OF ASSESSMENT

Assessment benefits the student and the lecturer. It informs students about their progress and helps lecturers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.

6.1 Baseline assessment

At the beginning of a level or learning experience, baseline assessment establishes the knowledge, skills, values and attitudes (SKVAs) that students bring to the classroom. This knowledge assists lecturers to plan learning programmes and learning activities.

6.2 Diagnostic assessment

This assessment diagnoses the nature and causes of learning barriers experienced by specific students. It is followed by guidance, appropriate support and intervention strategies. This type of assessment is useful to make referrals for students requiring specialist help.

6.3 Formative assessment

This assessment monitors and supports teaching and learning. It determines student strengths and weaknesses and provides feedback on progress. It determines if a student is ready for summative assessment.

6.4 Summative assessment

This type of assessment gives an overall picture of student progress at a given time. It determines whether the student is sufficiently competent to progress to the next level.

7 PLANNING ASSESSMENT

An assessment plan should cover three main processes:

7.1 Collecting evidence

The assessment plan indicates which Subject Outcomes and Assessment Standards will be assessed, what assessment method or activity will be used and when this assessment will be conducted.

7.2 Recording

Recording refers to the assessment instruments or tools with which the assessment will be captured or recorded. Therefore appropriate assessment instruments must be developed or adapted.

7.3 Reporting

All the evidence is put together in a report to deliver a decision for the subject.

8 METHODS OF ASSESSMENT

Methods of assessment refer to who carries out the assessment and includes lecturer assessment, self-assessment, peer assessment and group assessment.

LECTURER ASSESSMENT	The lecturer assesses students' performance against given criteria in different contexts, such as individual work, group work, etc.
SELF-ASSESSMENT	Students assess their own performance against given criteria in different contexts, such as individual work, group work, etc.
PEER ASSESSMENT	Students assess another student's or group of students' performance against given criteria in different contexts, such as individual work, group work, etc.
GROUP ASSESSMENT	Students assess the individual performance of other students within a group or the overall performance of a group of students against given criteria.

9 INSTRUMENTS AND TOOLS FOR COLLECTING EVIDENCE

All evidence collected for assessment purposes is kept or recorded in the student's PoE.

The following table summarises a variety of methods and instruments for collecting evidence. A method and instrument is chosen to give students ample opportunity to demonstrate that the Subject Outcome has been attained. This will only be possible if the chosen methods and instruments are appropriate for the target group and the Specific Outcome being assessed.

	METHODS FOR COLLECTING EVIDENCE		
	Observation-based (Less structured)	**Task-based** (Structured)	**Test-based** (More structured)
Assessment instruments	• Observation • Class questions • Lecturer, student, parent discussions	• Assignments or tasks • Projects • Investigations or research • Case studies • Practical exercises • Demonstrations • Role-play • Interviews	• Examinations • Class tests • Practical examinations • Oral tests • Open-book tests
Assessment tools	• Observation sheets • Lecturer's notes • Comments	• Checklists • Rating scales • Rubrics	• Marks (e.g. %) • Rating scales (1-7)
Evidence	• Focus on individual students • Subjective evidence based on lecturer observations and impressions	**Open middle**: Students produce the same evidence but in different ways. **Open end**: Students use same process to achieve different results.	Students answer the same questions in the same way, within the same time.

10 TOOLS FOR ASSESSING STUDENT PERFORMANCE

Rating scales are marking systems where a symbol (such as 1 to 7) or a mark (such as 5/10 or 50%) is defined in detail. The detail is as important as the coded score. Traditional marking, assessment and evaluation mostly used rating scales without details such as what was right or wrong, weak or strong, etc.

Task lists and **checklists** show the student what needs to be done. Thesey consist of short statements describing the expected performance in a particular task. The statements on the checklist can be ticked off when the student has adequately achieved the criterion. Checklists and task lists are useful in peer or group assessment activities.

Rubrics are a hierarchy (graded levels) of criteria with benchmarks that describe the minimum level of acceptable performance or achievement for each criterion. Using rubrics is a different way of assessing and cannot be compared to tests. Each criterion described in the rubric must be assessed separately. Mainly two types of rubrics, namely holistic and analytical, are used.

11 SELECTING AND/OR DESIGNING RECORDING AND REPORTING SYSTEMS

The selection or design of recording and reporting systems depends on the purpose of recording and reporting student achievement. **Why** particular information is recorded and **how** it is recorded determine which instrument will be used.

Computer-based systems, for example spreadsheets, are cost and time effective. The recording system should be user-friendly and information should be easily accessed and retrieved.

12 COMPETENCE DESCRIPTIONS

All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not be simply a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) that a student must demonstrate to achieve each level of the rating scale.

When lecturers or assessors prepare an assessment task or question, they must ensure that the task or question addresses an aspect of a Subject Outcome. The relevant Assessment Standard must be used to create the rubric to assess the task or question. The descriptions must clearly indicate the minimum level of attainment for each category on the rating scale.

13 STRATEGIES FOR COLLECTING EVIDENCE

A number of different assessment instruments may be used to collect and record evidence. Examples of instruments that can be (adapted and) used in the classroom include:

13.1 Record sheets

The lecturer observes students working in a group. These observations are recorded in a summary table at the end of each project. The lecturer can design a record sheet to observe students' interactive and problem-solving skills, attitudes towards group work and involvement in a group activity.

13.2 Checklists

Checklists should have clear categories to ensure that the objectives are effectively met. The categories should describe how the activities are evaluated and against what criteria they are evaluated. Space for comments is essential.

SECTION C: ASSESSMENT IN MARKETING

1 SCHEDULE OF ASSESSMENT

At NQF levels 2, 3 and 4, lecturers will conduct assessments as well as develop a schedule of formal assessments that will be undertaken in the year. All three levels also have an external examination that accounts for 50 percent of the total mark. The marks allocated to assessment tasks completed during the year, kept or recorded in a PoE account for the other 50 percent.

The PoE and the external assessment include practical and written components. The practical assessment in Marketing must, where necessary, be subjected to external moderation by Umalusi or an appropriate Education and Training Quality Assurance (ETQA) body, appointed by the Umalusi Council in terms of Section 28(2) of the *General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001).*

2 RECORDING AND REPORTING

Marketing, as is the case for all the other Vocational subjects, is assessed according to five levels of competence. The level descriptions are explained in the following table.

Scale of Achievement for the Vocational component

RATING CODE	RATING	MARKS %
5	Outstanding	80-100
4	Highly Competent	70-79
3	Competent	50-69
2	Not yet competent	40-49
1	Not achieved	0-39

The programme of assessment should be recorded in the Lecturer's Portfolio of Assessment for each subject. The following at least should be included in the Lecturer's Assessment Portfolio:

- A contents page
- The formal schedule of assessment
- The requirements for each assessment task
- The tools used for each assessment task
- Recording instrument(s) for each assessment task
- A mark sheet and report for each assessment task

The college must standardise these documents.

The student's PoE must include at least:

- A contents page
- The assessment tasks according to the assessment schedule
- The assessment tools or instruments for the task

- A record of the marks (and comments) achieved for each task

Where a task cannot be contained as evidence in the PoE, its exact location must be recorded and it must be readily available for moderation purposes.

ASSESSMENT OF MARKETING

LEVEL 4

3 INTERNAL ASSESSMENT OF SUBJECT OUTCOMES IN MARKETING - LEVEL 4

Topic 1: Manage own advertising research process

SUBJECT OUTCOME	
1.1 Demonstrate the ability to manage own advertising research process.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Explanations of how to manage own advertising research process are given in order to achieve a marketing objective. • The procedure to manage own advertising research process is identified and explained in summary form. • Identified procedure is examined to ascertain whether improvements can be made to enhance managing of performance. • Consequences of not managing own advertising research process is described in line with personal performance standards.	• Discuss and explain how to manage your own advertising research process to ensure the achieving of marketing objectives. • Identify the factors influencing the managing of own advertising research process. • Explain the procedure for managing own advertising process. • Examine the procedure for managing own advertising process and give suggestions for improving the process. • Describe the consequences of not managing own advertising research process for the organisation as well as self.
ASSESSMENT TASKS OR ACTIVITIES	
• Group discussion: Individual notes on discussion. • Checklist of procedure for managing own advertising process. • Group analysis and suggested procedures: Documented evaluation of procedure. • Written task. • Self–assessment of own ability.	

Topic 2: Flow and processing of marketing data

SUBJECT OUTCOMES	
2.1 Identify market information flow needs.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Marketing information flow needs are identified through internal and external consultation. • The form of marketing information flow is identified and recorded in the required format. • Marketing information flow is in accordance with established information processing procedure. • The marketing information flow is recorded with critical success factors identified. • Identified information flow systems meet the needs of individuals, groups and organisation.	• Identify marketing information flow needs through internal and external consultation of stakeholders. • Identify and record the form of marketing information flow in the required format. • List and explain the marketing information processing procedure for each type of stakeholder consulted. • Identify the critical success factors of marketing information flow. • Identify the information flow systems and ensure that they meet the needs of individuals, groups and organisations.
ASSESSMENT TASKS OR ACTIVITIES	
• Research task: Interview/consult one internal and one external stakeholder. • Written task. • Assignment: Part of research task. • Written activities.	

SUBJECT OUTCOMES	
2.2 Monitor and review marketing information flow.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Monitoring and review measures and criteria are cost effective and make optimum use of data resources and means of collection. • Information flow is timely and provides sufficient data to make decisions on its effectiveness. • Monitoring identifies data flow problems and allows for remedial action to be implemented. • Review processes ensure opportunities to enhance information flow systems and procedures. • Information flow system techniques and methods for improvement are identified and are comparable with greater marketing requirements.	• Design a checklist to ensure successful monitoring of marketing information flow. • Review monitoring measures and criteria to ensure cost effectiveness. • List ways of ensuring data resources and means of data collection are used optimally. • Create a checklist to ensure information flow is timely and provides sufficient data to make decisions on its effectiveness. • Demonstrate the ability of monitoring marketing information to identify data flow problems. • Summarise a remedial action plan to be implemented if data problems are identified. • Design a checklist to review processes to ensure that opportunities to enhance information flow systems and procedures are identified according to organisation policy. • Identify methods of reviewing processes that will ensure that opportunities to enhance procedures. • Identify information flow system techniques and methods for improvement. • Compare the information system techniques and methods with greater marketing requirements.
ASSESSMENT TASKS OR ACTIVITIES	
• Checklist. • Summarise remedial plan of action. • Assignment. • Comparison table.	

SUBJECT OUTCOMES	
2.3 Gather data for researching and information purposes.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The information is gathered timeously and within an agreed budget. • The sample base used to gather data is statistically valid. • The consequences of not gathering accurate and relevant information are identified in line with decision-making processes. • The objective is clearly defined to ensure the relevant gathering of data. • The source of data is credible and relevant to the project. • The methodology being used is appropriate to the objectives.	• List and explain the ways of gathering data for research and information purposes within an agreed budget • Gather data for a specific purpose outlined in a marketing organisation within an agreed budget. • Validate the sample base used to gather data statistically. • Identify the consequences of not gathering accurate and relevant information in line with decision-making processes. • Define the objective of gathering the data to ensure that the relevant data is gathered. • Describe the source of the data gathered to ensure that it is credible and relevant to the marketing project. • Discuss the methodology used to gather data to ascertain whether the methodology used is appropriate to the objectives.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion noted: Oral test. • Group research activity. • Signed document indicating validation of sample base. • Written exercise. • Discussion activity that has a written application thereafter.	

SUBJECT OUTCOMES	
2.4 Process data for researching information purposes.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The information processed is valid and relevant to the defined problem. • The user is able to commission and manage the research process. • The data processed is validated by using the appropriate equipment and tools. • The process that is used to evaluate the data ensures appropriate conclusions are reached • The processing of data is completed within the agreed times frames and budget.	• Check the data to ensure that the information processes is valid and relevant to the defined problem. • Create a checklist to ensure that the user is able to commission and manage the research process. • Validate data processes by using appropriate equipment and tools. • List the processes to evaluate the data that ensures appropriate conclusions are reached. • Evaluate or process the gathered marketing information flow data within agreed time frames and budget. • Reach a conclusion on gathered data within agreed time based on processes used.
ASSESSMENT TASKS OR ACTIVITIES	
• Practical: Role play/simulation in a structured environment. • Checklist. • Research activity: Research processes to evaluate the data that ensures appropriate conclusions are reached. • Checklist. • Report on findings on gathered data. • Practical and theoretical test.	

Topic 3: Marketing policy and plan compliance

SUBJECT OUTCOME	
3.1 Describe the organisational ethics that a marketing plan and policy must comply with.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The concept organisational ethics is discussed in terms of organisational marketing policy. • The organisational ethics that a marketing plan and policy must comply with are identified and described according organisational policy. • The consequences of marketing plans and policy not complying with stated organisational ethics are identified in relation to required legislation.	• Discuss organisational ethics generally. • Describe organisational ethics in terms of organisational marketing policy. • Discuss the place of organisational ethics in a marketing organisation with examples. • Identify the organisational ethics that a marketing plan must comply with. • Identify the organisational ethics that a marketing policy must comply with. • Compare the organisational ethics of a marketing plan and a marketing policy in relation to similarities and differences. • Discuss the consequences of marketing plans and policy not complying with organisational ethics as required by legislation.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion activity with guidelines and written notes. • Practical exercise: List of organisational ethics. • Comparison table. • Written exercise.	

SUBJECT OUTCOME	
3.2 Assess whether the marketing plan complies with organisational ethics.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• A marketing plan is examined to ascertain whether it complies with organisational ethics. • Reasons for agreement or disagreement are defined accurately.	• Obtain a recent marketing plan from a marketing organisation. • Examine the marketing plan to ascertain whether it complies with the required organisational ethics. • Reach a conclusion about the retrieved marketing plan and give reasons for your conclusion.
ASSESSMENT TASKS OR ACTIVITIES	
• Obtain a marketing plan and analyse to ascertain whether it complies with the required organisational ethics. • Practical: Examine and analyse marketing plan. • Evaluation report on marketing plan's compliance. • Open book test.	

Topic 4: Expertise and resources within a marketing plan

SUBJECT OUTCOME	
4.1 Determine criteria for expertise and resources.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Expertise and resource needs are identified and include competencies and attributes required. • Estimates of resource needs are produced. • Expertise and resource needs are confirmed with key persons and authorised within scheduled time frames. • Expertise and resource criteria are clear, concise and complete.	• Identify the expertise and resources needed for a marketing plan to be successful. • List the criteria for selecting expertise and resources for a marketing plan. • List the competencies and attributes of the human resources involved in the activities of the marketing plan. • Describe methods of determining the monetary estimate of resources needed for a marketing plan. • Obtain a marketing plan from a marketing organisation and identify the expertise and resources needed, include the competencies of the marketing people dealing with the marketing plan. • Describe methods of confirming expertise and resource needs with key authorised persons within scheduled time frame.
ASSESSMENT TASKS OR ACTIVITIES	
• Research activity: Interview a marketing consultant or manager. Write findings in a memo or report. • Written activity. • Obtain a marketing plan or use already retrieved marketing plan: Identify the expertise and resources needed, include the competencies of the marketing people dealing with the marketing plan.	

SUBJECT OUTCOME	
4.2 Establish and record expertise and resources.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Processes for the establishment of expertise comply with established procedures and support the organisation's objectives. • The choice of expertise and resources best expresses the needs, operations and service requirements of the organisations. • Expertise and resources are documented in the required format and within agreed time frames.	• Identify processes for the establishment of expertise in a marketing plan. • Determine whether the chosen processes comply with established procedures and support the organisation's objectives. • List the processes for the establishment of expertise that comply with established procedures, support the organisation's objectives and complement the retrieved marketing plan. • Design a checklist that establishes that the choice of expertise and resources best expresses the needs, operations and service requirements of the organisations. • Explain how the expertise and resources of a marketing plan are documented in the required format. • Discuss the importance of documenting the expertise and resources of a marketing plan in the required format within the agreed time frames. • Record the expertise and resources for the obtained marketing plan.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion activity that has a written application thereafter. • Evaluation checklist. • Written assignment. • Checklist. • Written task and example of documented/recorded expertise and resources that could be taken from a case study.	

SUBJECT OUTCOME	
4.3 Report on expertise and resources.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The reporting method selected is appropriate to the context and organisational requirement. • Report is prepared using data recorded and in accordance with organisational requirements. • Report is submitted within agreed time frames and format.	• Discuss ways of reporting on expertise and resources of marketing plans that is appropriate to the context and organisational requirement. • Select a reporting method that is appropriate to the context and organisational requirement for the retrieved marketing plan. • Prepare a report using data recorded in accordance with organisational requirements. • Discuss ways of submitting reports on expertise and resources within agreed time frames and format. • Submit report to relevant person within agreed time and format.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion - notes • Practical – simulation or role play – observation checklist • Report on expertise and resources • Written task • Practical – simulation or role play – observation checklist • Signed documentation of receipt of report • Practical test based on case study	

Topic 5: Marketing component of business strategic plan

SUBJECT OUTCOME	
5.1 Discuss the importance of giving marketing input into the business strategic plan.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• A business strategic plan is explained in terms of its importance to the organisation. • Marketing inputs are identified and explained so that input can be given into the business strategic plan of the organisation. • Advantages of giving input to the business strategic plan are identified using examples. • An explanation of how the strategic plan can be developed by the marketing input given by the marketing department is outlined.	• Explain what a business strategic plan is. • Discuss the importance of a business strategic plan to a marketing organisation. • Identify and explain types of input that can be given by the marketing department to the strategic plan. • List the advantages of giving marketing inputs to a business strategic plan. • Provide examples of the different types of marketing inputs that a marketing department can supply. • Describe how the strategic plan can be developed by the marketing department's input.
ASSESSMENT TASKS OR ACTIVITIES	
• Research assignment. • Presentation of examples of marketing inputs and description on how marketing department can develop strategic plan. • Topic test.	

Topic 6: Marketing performance standards

SUBJECT OUTCOME	
6.1 Demonstrate an understanding of marketing performance standards.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Required marketing performance standards are identified and listed. • Marketing performance standards are explained. • Responsibilities arising from marketing performance standards are identified and explained. • Marketing performance standards are agreed to.	• Identify marketing performance standards as required by the marketing industry. • Explain the required marketing performance standards. • Identify responsibilities arising from the required marketing performance standards. • Explain the responsibilities arising from marketing performance standards. • Select and agree to the marketing performance standards that a marketing organisation should adhere to.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion activity that has a written application thereafter. • Task to include responsibilities arising from marketing performance standards. • Practical exercise: Source marketing performance standards from marketing experts and select standards for retrieved marketing plan and explain the choice of performance standards	

SUBJECT OUTCOME	
6.2 Follow instructions to meet standards.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Instructions given are identified and listed. • A plan is explained and designed to follow and meet the instructions of a marketing campaign. I • Instructions are carried out within agreed time frames. • Instructions are carried out correctly, accurately and in the required format. • Feedback on progress is given to authorised marketing persons.	• Identify instructions that could be given to ensure the objectives of a marketing campaign are achieved. • Explain how a plan is designed to follow and meet the instructions of a marketing campaign. • Develop timeframes checklist to ensure that instructions are carried out within agreed time frames and required format. • Follow instructions given by the marketing campaign manager by developing a plan to follow instructions and a timeframe checklist to ensure instructions are carried out within agreed timeframes. • Provide feedback on progress of instructions given to authorised marketing persons.
ASSESSMENT TASKS OR ACTIVITIES	
• Instructions checklist. • Written task. • Checklist. • Written report or Oral report: Concise notes if oral report is given. • Plan to follow instructions: Checklist for timeframes must compliment instructions plan.	

SUBJECT OUTCOME	
6.3 Meet marketing objectives.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Objectives of a marketing plan or campaign are identified, explained and listed • A plan is devised to ensure that the objectives are met within the agreed time frames. • Deviations from the objectives of a marketing plan or campaign are identified. • Corrective/remedial action is taken when necessary.	• Identify and explain objectives of marketing plan or campaign. • Devise a plan to ensure that the objectives are met within agreed time frames. • Explain how deviations from the objectives of a marketing plan or campaign are identified. • Discuss how corrective or remedial action is taken when necessary. • List objectives of a chosen marketing plan or campaign, devise plan to ensure that the listed objectives are met and identify necessary corrective action taken.
ASSESSMENT TASKS OR ACTIVITIES	
• Obtained marketing plan: Analyse and identify objectives for the selected marketing plan. Report or presentation on findings. • Practical exercise: Typed action plan to meet the marketing objectives of the retrieved marketing plan. Above task to include deviations, remedial action if identified.	

SUBJECT OUTCOME	
6.4 Report on marketing objectives progress.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Marketing objectives progress is monitored and evaluated at pre-determined intervals. • Progress is reported within agreed time frames and is presented concisely to aid decision-making. • Recommendations for improvements are made and make provision for both long and short-term objectives.	• Discuss ways in which marketing objectives progress is monitored and evaluated at pre-determined intervals. • Explain how the pre-determined intervals of evaluation of marketing objectives are determined. • Discuss ways of monitoring and evaluating marketing objectives of a marketing plan or campaign. • Monitor and evaluate marketing objectives of a chosen marketing plan. • Explain methods of reporting progress of marketing objectives within agreed timeframes • Present progress report on marketing objectives concisely to aid decision-making. • Make recommendations for improvements and make provision for both long and short-term objectives
ASSESSMENT TASKS OR ACTIVITIES	
• Documented discussion • Written exercise • Practical – design checklist to monitor achievement of marketing objectives; conduct evaluation; Completed checklist • Presentation of progress report – report to include recommendations and provision for both long and short term objectives **NOTE**: Integrative assessment can occur with marketing communication presentation/ fundamental communication – report writing • Topic test	

Topic 7: Marketing resources to meet marketing objectives

SUBJECT OUTCOME	
7.1 Identify and assess marketing resources required.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Relevant marketing resources are identified to meet marketing objectives of chosen marketing plan or campaign. • Required resources are located to meet marketing objectives according to organisational requirements. • Marketing resources are sourced and obtained within agreed time frames to meet marketing objectives • Marketing resources are assessed and evaluated and recommendations for improvement are made to meet marketing objectives.	• Identify marketing resources to meet marketing objectives of chosen marketing plan or campaign. • Locate required marketing resources to meet marketing objectives according to organisational requirements. • Obtain marketing resources to meet marketing objectives within agreed time frames. • Assess marketing resources to make recommendations for improvement of the meeting of marketing objectives.
ASSESSMENT TASKS OR ACTIVITIES	
• Discussion activity with written application. • Task to include methods of locating required marketing resources. • Practical task: Source/identify marketing resources from marketing experts to compliment retrieved marketing plan. • Checklist to assess marketing resources in order to make recommendations.	

SUBJECT OUTCOME	
7.2 Utilise marketing resources to meet objectives.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Resources are utilised in completing the tasks and activities. • Marketing resources are allocated to tasks. • Marketing resources are utilised optimally. • Unplanned and/ or unscheduled contingencies are identified and remedial actions planned. • Allocation of resources is fair, consistent and aligns with the competence and capabilities.	• Explain how marketing resources will be utilised in the completing of tasks and activities. • Describe how the allocation of resources to marketing objective tasks occurs. • Describe ways of ensuring the allocation of resources is fair, consistent and aligns with the competence and capabilities of the human resources. • Discuss how marketing resources can be used optimally. • Identify unscheduled contingencies that may take place when utilising marketing resources. • Plan remedial actions for unscheduled contingencies. • Identify marketing resources to be used in chosen marketing plan or campaign, allocate the resources and identify possible unscheduled contingencies for chosen marketing plan or campaign.
ASSESSMENT TASKS OR ACTIVITIES	
• Written task. • Case study. • Exercise. • Project assignment (practical): Choose a marketing plan not previously used and identify marketing objectives, marketing resources, plan to distribute resources fairly, plan for unscheduled contingencies , plan to assess the use of market resources.	

SUBJECT OUTCOME	
7.3 Account for marketing resources.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Resources are listed and organised in a logical manner. • Use of resources are documented and recorded in the required format. • Resources are accounted for and are in the required location.	• List resources used in chosen marketing plan or campaign in an organised manner so that marketing resources are accounted for. • Document the use of marketing resources in chosen marketing plan or campaign in required format. • Create a checklist to ensure that resources are accounted for and are in the required location.
ASSESSMENT TASKS OR ACTIVITIES	
• Obtain marketing plan: Identify marketing resources to be used, document them. • Checklist. • Topic test.	

Topic 8: Develop and manage marketing plans and strategies

SUBJECT OUTCOME	
8.1 Describe internal and external issues that impact on marketing planning in a business.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The issues impacting on marketing planning are identified and described in an organisation. • Issues are categorised into internal and external issues that impact on marketing planning in a business. • The difference between internal and external issues is explained to establish which needs priority treatment and examples are provided.	• Identify and describe issues that impact on marketing planning in an organisation. • Differentiate between internal and external issues impacting on marketing planning. • Explain the difference between internal and external issues impacting on marketing planning • Provide examples of the difference between internal and external issues impacting on marketing planning.
ASSESSMENT TASKS OR ACTIVITIES	
Discussion activity with clear guidelines to summarise internal and external issues with examples.	

SUBJECT OUTCOME	
8.2 Explain the importance of reviewing the marketing plan and strategy.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Importance of reviewing the marketing plan and strategy of a marketing organisation is explained. • The importance of using current data is explained when preparing a market strategy. • The steps to take if data is not current are listed and explained in order to ensure the satisfactory development of a market strategy.	• Discuss the importance of reviewing the marketing plan and strategy of a marketing organisation. • Explain the importance of using current data when preparing a market strategy. • Identify the steps to take if data used to review the marketing plan and strategy is not current.
ASSESSMENT TASKS OR ACTIVITIES	
• Assignment. • Group discussion. • Written test.	

SUBJECT OUTCOME	
8.3 Conduct a market and environmental analysis using established techniques.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• A market and environment analysis is conducted using established techniques in accordance with simulated available budget and personnel. *Range: Analysis – existing market data and additional data.* *Note: The analysis can be conducted on a small scale; the idea is to check whether a student can perform the various functions involved with a market and environmental analysis.*	• Conduct a small-scale market and environmental analysis using established techniques in accordance with available budget, existing market data and additional data. • Write a report of your findings to present to marketing authorities.
ASSESSMENT TASKS OR ACTIVITIES	
• Research task based on case study: Market and environment analysis. • Report. • Topic test.	

Topic 9: International services of marketing

SUBJECT OUTCOME	
9.1 Explain the nature of international trade and importance thereof.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The concept international trade is explained. • The nature of international trade and importance thereof is identified and explained in relation to marketing in South Africa.	• Explain the concept international trade with respect with respect to marketing. • Identify the nature and characteristics of international trade. • Discuss the importance of international trade in relation to marketing in South Africa.
ASSESSMENT TASKS OR ACTIVITIES	
• Group discussion. • Assignment.	

SUBJECT OUTCOME	
9.2 Interpret the role that culture plays in international marketing.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• The role culture plays in international marketing is interpreted in terms of an organisation doing international business.	• Interpret the role that culture plays in international trade. • Discuss the reasons why culture should be considered in international trade. • Explain ways of ensuring that culture does not interfere with international business of an organisation.
ASSESSMENT TASKS OR ACTIVITIES	
• Group discussion with a presentation on findings and presentation notes or slides. • Written task.	

SUBJECT OUTCOME	
9.3 Describe foreign trade policies and the impact these have on South African marketing.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• A trade policy is defined accurately. • Foreign trade policies and the impact they have on South African marketing are identified and described.	• Define the concept trade policy and the influence it would have on South African trading. • Research and identify South African trade policies. • Identify and describe the impact South African trade policies have on marketing in South Africa. • Explain the impact South African trade policies have on international services.
ASSESSMENT TASKS OR ACTIVITIES	
Research task: Analyse South African trade policies and describe impact their impact on marketing and write a report on findings.	

SUBJECT OUTCOME	
9.4 Choose strategies for South Africa entering the foreign market.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Strategies for South Africa entering the foreign market are chosen in relation to a specific product. • Reasons why strategies were chosen are given accurately. • The benefits of South African entering the foreign market are assessed in relation to a specific product.	• List reasons why South Africa should enter foreign markets. • List strategies for South African products to enter the foreign market. • Provide reasons why the strategies were chosen for a particular product. • Assess the benefits of South African products entering the foreign market.
ASSESSMENT TASKS OR ACTIVITIES	
Research task with findings.	

SUBJECT OUTCOME	
9.5 Identify a strategic programme for entering the international marketing.	
ASSESSMENT STANDARD	**LEARNING OUTCOME**
• Strategic programmes to enter an international market are identified and compared in order to differentiate between them. • A strategic programme for entering the international marketing is identified and explained in relation to a specific product. • The manner of entering an international market is explained in relation to choosing the correct strategic programme.	• Identify strategic programmes for entering an international market. • Compare and describe the different strategic programmes for entering an international market. • Identify a strategic programme for a specific product. • Explain the choice of the strategic programme for entering the international marketing. • Explain the way in which a product enters the international market and how a strategic programme is chosen correctly.
ASSESSMENT TASKS OR ACTIVITIES	
• Assignment. • Open book test. • Examinations.	

4 SPECIFICATIONS FOR EXTERNAL ASSESSMENT IN MARKETING - LEVEL 4

4.1 Integrated Summative Assessment Task (ISAT)

A compulsory component of ESASS is the **Integrated Summative Assessment Task (ISAT),** which is a major assessment task that draws on the students' cumulative learning achieved throughout the full year. The task requires ***integrated application of competence*** and is executed and recorded in compliance with assessment conditions.

In Marketing Level 4 students will have achieved the competencies through the year but the competencies will be assessed cumulatively in a single assessment /exam session at the end of the year

The ISAT will be set by the externally appointed examiner and be conveyed to colleges within the first quarter of each year.

The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.

4.2 National examination

A national examination is conducted annually in October or November by means of a paper set externally and marked and moderated externally. The following distribution of cognitive application is suggested:

	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
LEVEL 4	50%	30%	20%