education

Department:
Education
REPUBLIC OF SOUTH AFRICA

# NATIONAL CERTIFICATE (VOCATIONAL)

## SUBJECT GUIDELINES

# PERSONAL ASSISTANCE

# NQF Level 4

September 2007

# PERSONAL ASSISTANCE – LEVEL 4

# CONTENTS

**INTRODUCTION**

**1 DURATION AND TUITION TIME**

**2 SUBJECT LEVEL FOCUS**

**3 ASSESSMENT REQUIREMENTS**

3.1 Internal assessment

3.2 External assessment

**4 WEIGHTED VALUES OF TOPICS**

**5 CALCULATION OF FINAL MARK**

**6 PASS REQUIREMENTS**

**7 SUBJECT AND LEARNING OUTCOMES**

7.1 Plan and conduct meetings

7.2 Apply basic business principles

7.3 Customer complaints

7.4 Liaise with a range of customers of a business

7.5 Factors that influence productivity.

7.6 Measure and improve single factor productivity at a work station.

7.7 Identify expertise and resources

**8 RESOURCE NEEDS FOR THE TEACHING OF PERSONAL ASSISTANCE LEVEL 4**

8.1 Physical resources

8.2 Human resources:

8.3 Other Resources:

# INTRODUCTION

## A. What is Personal Assistance?

Personal Assistance is designed to meet the needs of those students who would like to enter or specialise in the field of secretarial studies. The knowledge of the subjects Business Practice and Office Practice from NQF 2 to NQF 4 give the student the opportunity to specialise in the subject Personal Assistance.

## B. Why is Personal Assistance important in the Office Administration programme?

Personal Assistance promotes the development of knowledge and skills that are required in all sub-sectors of secretarial practice, to unleash the potential of individuals and ultimately provide them with the opportunity for individual growth.

## C. The link between the Personal Assistance Learning Outcomes and the Critical and Developmental Outcomes

Personal Assistance provides students with knowledge of company secretarial and other key business practices that will equip them for a specific career, for example a secretary whose function is pivotal to the operational success of any organisation. Overall, it also focuses on the skills, knowledge, values and attitudes required to progress further.

## D. Factors that contribute to achieving the Personal Assistance Learning Outcomes

A student with an interest in the field of commerce or in the business world will benefit from studying Personal Assistance. Students who have developed characteristics such as thoroughness, accuracy and orderliness will enjoy the subject Personal Assistance. The subject will provide the student with a foundation of secretarial, business and management skills which will lead to competence to be an effective, efficient, productive and knowledgeable personal assistant, office administrator and data capturer. Those who have studied the subject Personal Assistance will also be able to contribute to the smooth running of an organisation and will be able to execute elementary secretarial functions. The subject provides the student with a clear understanding of the working environment and the importance of the role of personal assistant in an organisation

## 1 DURATION AND TUITION TIME

This is a one-year instructional programme comprising 200 teaching and learning hours. The subject may be offered on a part-time basis provided all of the assessment requirements are adhered to.

Course preparation should consider students with special education needs (LSEN).

## 2 SUBJECT LEVEL FOCUS

The general and overall aim of the subject at this level is to equip the students with the necessary basic skills and knowledge to enable them to plan and coordinate meetings and events in the business, liaise with a range of customers of the business and handle customer complaints.

## 3 ASSESSMENT REQUIREMENTS

### 3.1 Internal assesment (50 percent)

All marks are systematically processed and accurately recorded to be available as hard copy evidence for, amongst others, purposes of moderation and verification, as well as for purposes of reporting.

3.1.1 Theoretical Component

The theoretical component of Personal Assistance will form 30 percent of the subject.

Weekly assessments are necessary on all theoretical work and this can be done by short assessments that can be incorporated in the year mark. Short assessments are important but cannot replace the final assessment of each topic or the semester assessment. The theoretical component can be assessed individually or in groups using a variety of assessment instruments.

3.1.2 Practical Component

The practical component of Personal Assistance will form 70 percent of the internal assessment. All practical components must be indicated in a Portfolio of Evidence (PoE).

Practical assessment will be done in the simulated enterprise (SIM) and evidence will be placed in the PoE as evidence. Integration of practical work and theory will be assessed throughout the year in the form of task case studies and practical application exercises.

- **Some examples of practical assessments include, but are not limited to:**
  - Presentations (lectures, demonstrations, group discussions and activities, practical work, observation, role play, self activity, judging and evaluation)
  - Use of aids
  - Exhibitions
  - Visits
  - Guest speaker presentations
  - Research
  - Structured environment

- **Definition of the term "Structured Environment"**

"Structured environment" for the purposes of assessment refers to an actual or simulated workplace, or workshop environment. It is advised that a practicum room is available on each campus for practical assessment.

- **Evidence in practical assessments**

All evidence pertaining to evaluation of practical work must be reflected in the student's Portfolio of Evidence. The tools and instruments constructed and used for the purpose of conducting such assessments must be clear from evidence contained in the PoE.

3.1.3 Processing of internal assessment mark for the year

A year mark out of 100 is calculated by adding the marks of the theoretical component and the practical component of the internal continuous assessment.

3.1.4 Moderation of internal assessment mark

Internal assessment is subject to both internal and external moderation procedures as contained in the *National Examinations Policy for FET College Programmes*.

### 3.2 External assessment (50 percent)

A national examination is conducted annually in October or November by means of a paper/s set internally and marked and moderated externally.

Details in respect of external assessment are contained in the *Assessment Guidelines: Personal Assistance* (Level 4).

## 4 WEIGHTED VALUES OF TOPICS

| TOPICS | WEIGHTED VALUE |
|---|---|
| 1. Plan and conduct meetings | 10% |
| 2. Apply basic business principles | 30% |
| 3. Customer complaints. | 10% |
| 4. Liase with a range of customers of business. | 5% |
| 5. Factors that influence productivity. | 20% |
| 6. Measure and improve single factor productivity at a workstation. | 20% |
| 7. Identify expertise and resources | 5% |
| **TOTAL** | **100** |

## 5 CALCULATION OF FINAL MARK

| | | |
|---|---|---|
| Internal assessment: | Student's mark/100 x 50 = a mark out of 50 | (a) |
| Examination mark: | Student's mark/100 x 50 = a mark out of 50 | (b) |
| **Final mark:** | **(a) + (b) = a mark out of 100** | |

All marks are systematically processed and accurately recorded to be available as hard copy evidence for, amongst others, purposes of moderation and verification, as well as for purposes of reporting.

## 6 PASS REQUIREMENTS

The student must obtain at least fifty (50) percent in ICASS and fifty percent (50) in the examination.

## 7 SUBJECT AND LEARNING OUTCOMES

On completion of Personal Assistance Level 4 the student should have covered the following topics:

Topic 1: Plan and conduct meetings
Topic 2: Apply basic business principles
Topic 3: Customer complaints
Topic 4: Liaise with a range of customers of a business
Topic 5: Factors that influence productivity.
Topic 6: Measure and improve single factor productivity at a workstation
Topic 7: Identify expertise and resources

## 7.1 Topic 1: Plan and conduct meetings

**7.1.1 Subject Outcome 1:** Plan and organise meetings of various types including the preparation of agendas, minutes and other documentation as required

**Learning Outcome**

The student should be able to:

- Describe standard meeting protocols and the importance of using them.
- Describe ways to determine the need and objectives of a meeting.
- Understand the importance of reaching decisions in meetings.
- Explain ways of managing discussions and problem solving.
- Describe ways to determine the appropriate delegates for a meeting.

**7.1.2 Subject Outcome 2:** Conduct a meeting in a structured and effective manner

**Learning Outcome**

The student should be able to:

- Arrange a meeting and compile an agenda.
- Inform the delegates about the meeting.
- Structure a meeting in accordance with the protocols (select a chairperson, minute taker, etc.)
- Run a meeting to achieve the objectives within the timeframe.

**7.1.3 Subject Outcome 3:** Complete and/or monitor the completion of actions arising from the meetings conducted.

**Learning Outcome**

The student should be able to:

- Ensure that all documentation is complete and circulated after the meeting (e.g. minutes, attendance, etc)
- Suggest ways to make meetings more effective.

## 7.2 Topic 2: Apply basic business principles

**7.2.1 Subject Outcome 1:** Apply the profit motive to a going concern.

**Learning Outcome**

The student should be able to:

- Discuss the profit of a going concern with examples.
- Apply the profit motive to a selected organisation.
- Explain the advantages and limitations of a particular form of business ownership with examples.

**7.2.2 Subject Outcome 2:** Apply production theory in a selected workplace

**Learning Outcome**

The student should be able to:

- Apply the principles of demand and supply to decision-making and to a pricing structure for a range of products and services.
- Determine break-even sales in Rand and unit terms for a range of products and services.
- Explain the theory of economy of scale in an essay on the topic.
- Present the role and cost of labour and equipment, as factors of supply or delivery of product and services to a group of peers.

**7.2.3 Subject Outcome 3:** Segment a market and undertake appropriate marketing measures.

**Learning Outcome**

The student should be able to:

- Conduct market research, collate data and evaluate and present it to a mentor.
- Segment a buying market for a range of products.
- Compose advertising for a target market and select appropriate media for placement.

**7.2.4 Subject Outcome 4:** Operate within a company reporting structure.

**Learning Outcome**

The student should be able to:

- Construct an organisational chart for a particular company.
- Clarify staff and line functions, and identify reporting lines within a selected company's hierarchical structure.
- Describe the mission, vision and values of a company relating them to function.
- Define and present supervisory and managerial roles, using examples.

**7.2.5 Subject Outcome 5:** Align business unit goals with overall business strategy and objectives.

**Learning Outcome**

The student should be able to:

- Interpret organisational objectives and analyse a business plan for a particular company.
- Implement efficient action plans to meet organisational objectives.
- Report unworkable objectives and construct contingency plans to ensure that business goals remain achievable.

### 7.3 Topic 3: Customer complaints

**7.3.1 Subject Outcome 1:** Identify the customer's problems.

**Learning Outcome**

The student should be able to:

- Identify and assess the nature of the complaint.
- Define the origin of the complaint.
- Take responsibility for action to solve the problem.
- Document the problem, according to company regulations and requirements.

**7.3.2 Subject Outcome 2:** Communicate with all stakeholders.

**Learning Outcome**

The student should be able to:

- Notify relevant internal parties of the complaint and its rooting.
- Notify immediate superior of the customer's complaint for further action.
- Communicate to the customer regarding the outcome and the progress of the solution.

**7.3.2 Subject Outcome 2:** Commit to solving the customer complaint.

**Learning Outcome**

The student should be able to:

- Demonstrate commitment to resolve the complaint.
- Satisfy the customer with the progress of the complaint to date.

**7.3.3 Subject Outcome 3:** Commit to solving the customer complaint.

**Learning Outcome**

The student should be able to:

- Demonstrate commitment to resolve the complaint.
- Satisfy the customer with the complaints process to date.

**7.3.4 Subject Outcome 4:** Apply correct planning and solution to the customer's problem.

**Learning Outcome**

The student should be able to:

- Apply the correct solution to solve the customer's problems.
- Apply correct solution to the customer's complaint within the agreed timeframe.
- Maintain contact with all relevant stakeholders.

### 7.4 Topic 4: Liaise with a range of customers of a business

**7.4.1 Subject Outcome 1:** Initiate contact with a range of customers.

**Learning Outcome**

The student should be able to:

- Identify, assess and maintain or enhance current status of satisfaction.
- Inform customers of the business activities.
- Report back on the situation.

**7.4.2 Subject Outcome 2:** Maintain contact with a range of customers.

**Learning Outcome**

The student should be able to:

- Apply and establish communication processes with customers.
- Visit or telephone customers at predetermined intervals.
- Establish a reason to contact the customer.
- Build partnerships with a range of customers

**7.4.3 Subject Outcome 3:** Administer contact with a range of customers.

**Learning Outcome**

The student should be able to:

- Complete logbooks and/ or call reports as per company requirements.
- Present analysis and/ or report.
- Grade customers A/B/C.

### 7.5 Topic 5: Factors that influence productivity.

**7.5.1 Subject Outcome 1:** Demonstrate an understanding of the concept "productivity".

**Learning Outcome**

The student should be able to:

- Explain the concept "productivity" in terms of the output-input ratio.
- Explain productivity in terms of its core values.
- Explain productivity in terms of its benefits to society, the economy and the environment.
- Explain the productivity process in terms of effectiveness, efficiency, utilisation and respect for human dignity.
- Explain the different types of productivity with examples.

**7.5.2 Subject Outcome 2:** Measure total factor productivity.

**Learning Outcome**

The student should be able to:

- Measure total factor productivity using the output/input ration.
- Include all output and input items in the equation.
- Specify total factor productivity for a section, a department, the whole organisation or group of organisations.

**7.5.3 Subject Outcome 3:** Measure the quantitative factors that influence productivity and establish their influence.

**Learning Outcome**

The student should be able to:

- Measure quantitative factors that influence productivity using correct formulae.
- Identify correctly the causes of the current levels in the quantitative factors.
- Establish through measurement the influence of each quantitative factor on productivity.
- Explain the importance of the quantitative factors in improving productivity and profitability with examples.

**7.5.4 Subject Outcome 4:** Identify the qualitative factors that influence productivity and establish their influence.

**Learning Outcomes**

The student should be able to:

- Identify the qualitative factors that influence productivity.
- Identify the relationship between the quantitative factors that influence productivity and the qualitative factors.
- Establish the influence of the qualitative factors on productivity.

### 7.6 Topic 6: Measure and improve single factor productivity at a work station.

**7.6.1 Subject Outcome 1:** Measure single factor productivity and assess causes of its current levels.

**Learning Outcome**

The student should be able to:

- Measure single factor productivity through the correct application of the output-input ratio.
- Identify the current causes of levels of labour productivity using the appropriate measurement tool.
- Identify the causes of the current levels of material productivity using the appropriate measurement tool.
- Identify the causes of the current levels of capital productivity using the appropriate measurement tool.

**7.6.2 Subject Outcome 2:** Plan the actions required to improve single factor productivity.

**Learning Outcome**

The student should be able to:

- Outline the causes and effects of current levels of labour, material and capital productivity.giving examples from the organisation.
- Define the target to be achieved and actions required to improve the single factor productivity in conjunction with others.
- Define the role and responsibilities of others involved in improving single factor productivity for the organisation.
- Identify the actions to be taken to address the causes of current levels of single factor productivity with time frames for each.
- Compile a plan with the objectives, targets to be achieved, the roles and responsibilities of all people involved and the timeframe for implementation in an appropriate format.

**7.6.3 Subject Outcome 3:** Implement and evaluate the effectiveness of actions to improve single factor productivity.

**Learning Outcome**

The student should be able to:

- Carry out actions in time and in line with the plan.
- Deal with contingencies in a manner that contributes to improved single factor productivity.
- Establish actual improvements in single factor productivity and compared to set targets.
- Adjust the plan to ensure targets are achieved.
- Record all measurements made, plans implemented and adjustments made to plans in an acceptable format to assist future planning.

### 7.7 Topic 7: Identify expertise and resources

**7.7.1 Subject Outcome 1:** Determine criteria for expertise and resources.

**Learning Outcomes**

The student should be able to:

- Identify expertise and resource needs and include required competencies and attributes.
- Produce estimates of resource needs.
- Confirm expertise and resource needs with key persons and obtain authorisation within scheduled time frames.
- Set clear, concise criteria for expertise and resources.

**7.7.2 Subject Outcome 2:** Establish and record expertise and resources.

**Learning Outcomes**

The student should be able to:

- Express the choice of expertise and resources for operation and service requirements of the organisations.
- Document expertise and resources in the required format and within agreed time frames.

**7.7.3 Subject Outcome 3:** Report on expertise and resources.

**Learning Outcomes**

The student should be able to:

- Select the reporting method, which is appropriate to the context and organisational requirement.
- Prepare report, using recorded data.
- Submit report within agreed time frames and format.

## 8 RESOURCE NEEDS FOR THE TEACHING OF PERSONAL ASSISTANCE - LEVEL 4

### 8.1 Physical resources

The following teaching aids should be made available, if possible:

- **Practicum room: (Simulated room - SIM)**
  - A simulated enterprise in which students can gain practical experience within an office environment.
  - With a simulated office environment and necessary electronic equipment, e.g. adding machine, cash registers calculators, filing cabinets.
  - Computer and data projector to electronically project data must be available to facilitator; or
  - The facilitator must provide students with examples to be completed in practical assignments.
  - The latest developments in electronic equipment must be available.

- **Media centre**
  - Availability of computers and printers for students to complete assignments/case studies and do research.
  - Access to Internet for students.
  - Trading magazines, daily newspapers and subject related reference books for research by students.
  - Subject related DVDs/videos
  - List of guest speakers
  - List of website addresses for subject related research.
  - Legislation/Acts for use by lecturers during lessons and by students for research purposes.
  - Research software e.g. Encarta.
  - Stock room to store video/DVD machines, televisions, etc.
  - Security for stock room

- **Class room**
  - Flash disk for facilitator to store information.
  - White board, black board
  - Desks for students big enough to work on alone and in groups
  - Chairs

### 8.2 Human resources:

- **Lecturer/facilitator**
  - Applicable 3 year diploma; or
  - Applicable 4 year degree; and/ or
  - Diploma or degree in education
  - Declared competence as assessor and/or moderator
  - Trained in Outcomes Based Education (OBE)

### 8.3 Other Resources:

- Text books
- Lever arch file for each student to serve as portfolio of evidence
- Subscription fees for Internet, industry magazines, newspapers.
- Computer disk for each student