

SENIOR PHASE POLICY: ECONOMIC AND MANAGEMENT SCIENCES

This policy is subject to the requirements of the Education Department and the assessment policy of the school.

PLANNING

- Planning is done for the school year and should be finalized before the beginning of the new school year, but not later than the first Friday of the first term.
- Planning includes the development of a learning programme, work schedule and lesson plan.
- All the educators in the Senior Phase should participate in the planning session. The educators in a grade group especially should work together closely.
- The requirements for Economic and Management Sciences as set by the Education Department should be met throughout. To avoid confusion or lack of clarity, existing documents should be adapted as changes are brought about by the Education Department.
- The head of department for the Senior Phase should approve the learning programme, work schedule, lesson plan and assessment tasks before the principal or his or her deputies send them for processing.
- All the Senior Phase educators should send their planning for Economic and Management Sciences to the head of the department daily for monitoring. Learners' workbooks and assessment tasks should be sent along sporadically or as requested from time to time by the head of the department.
- The head of department for the Senior Phase and/or the principal should request weekly or daily planning files for monitoring as deemed necessary.
- Educators should make provision on their planning sheets for intervention and indicate how learners with barriers for learning are involved.
- Planning sheets need not be similar for all the grades or classes, as long as the information referred to above as well as the learning outcomes, time per day, activities and resources are indicated.

THE DEVELOPMENT OF ASSESSMENT TASKS:

- Assessment is an integral part of teaching and learning and should be included at all levels of planning.
- Assessment should be reliable and continuous.
- Assessment should be transparent, so that both educator and learner know exactly what the expectations are for each task.
- Assessment tasks should be developed as prescribed by the Education Department and the assessment policy of the school should be adhered to.
- Educators in each grade group should work together to develop assessment tasks. Work should be done on a rotation basis. All the educators in each grade group should preferably get a turn to develop the documents.
- Assessment tasks, as well as the applicable learning programme, work schedule and lesson plan should be submitted to the head of the department for approval. Where possible memoranda should be attached.
- Assessment tasks, lesson plans, etc. should preferably be ready for monitoring during the last week of the previous term, but not later than the first school day of the term in which it should be completed.
- Learners' performance should be recorded as a code for the assessment task.
- Where necessary comments may be written for support purposes.
- Assessment tasks should be typed neatly before being submitted for approval.
- In the case of absence the learner should be allowed to complete an assessment task later. (A written excuse from the learner's parent or guardian or a medical certificate is required.)
- Educators should inform a learner's parents in writing if the learner still has not completed assessment tasks after repeated requests. These letters should be signed by the head of the department and a copy should be placed in the learner's profile and/or the educator's intervention file.

ASSESSMENT

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 Educators about learners' specific needs. It provides Educators 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. Educators must consider all these skills when planning teaching, learning and assessment activities.

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-Educator 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 Educators 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 Educator wishes to do so. The results of daily assessment tasks are not taken into account for promotion and certification purposes.

Formal assessment

All assessment tasks that make up a formal programme of assessment for the year are regarded as formal assessment. The Educator 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 Educators 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.

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

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
<u>Covers all the topics</u> 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	<u>Topic: The Economy</u> 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	<u>Topic: Financial Literacy</u> 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	<u>Topic: Entrepreneurship</u> 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
<u>Covers all the topics</u> 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	<u>Topic: The Economy</u> 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	<u>Topic: Financial Literacy</u> 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	<u>Topic: Entrepreneurship</u> 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.

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



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.

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.

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.



TIME ALLOCATION

Senior Phase

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

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.

RECORDING AND REPORTING

Recording is a process in which the Educator 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 Curriculum and Assessment Policy Statements. Records of learner performance should provide evidence of the learner's conceptual progression within a grade and her/his readiness to progress or being promoted to the next grade. Records of learner performance should also be used to verify the progress made by Educators 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-Educator conferences, phone calls, letters, class or school newsletters, etc. Educators in all grades report in percentages against the subject. The various achievement levels and their corresponding percentage bands are as shown in the Table below.

Note: The seven point scale should have clear descriptions that give detailed information for each level.

Educators will record actual marks against the task by using a record sheet; and report percentages against the subject on the learners' report cards.



Recording is a process in which the Educator documents the level of a learner's performance. Educators record the actual raw marks against the task using a record sheet.

Records of learner performance should also be used to verify the progress made by Educators and learners in the teaching and learning process. Records should be used to monitor learning and to plan ahead.

Reporting is a process of communicating learner performance to learners, parents, the school, districts and other stakeholders, such as employers, tertiary institutions, and etcetera.

In Grades R – 12, Educators report in percentages against the subject, using the following scale:

The various achievement levels and their corresponding percentage bands are as follows:.

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

PRINCIPLES FOR RECORDING AND REPORTING

The following principles underpin the approach to both recording and reporting:

1. Recording of learner performance is against the assessment task and reporting is against the mark obtained in a term, semester or year.
2. Educators should show in their files that they have covered all the formal tasks set.
3. National codes and/or marks, percentages and comments can be used for recording and reporting purposes.
4. The following is applicable to recording and reporting per phase:
 - a. Foundation Phase (Grades R – 3): Record and report in national codes and their descriptions.
 - b. Intermediate Phase (Grades 4 – 6): Record and report in national codes and their descriptions and percentages.
 - c. Senior Phase (Grades 7 – 9): Record and report in national codes and their descriptions percentages.
 - d. Grades 10 – 12: Record in marks and report in percentages.



5. The schedule and the report card should indicate the overall level of performance of a learner.
6. In the case of Languages, each language that the learner offers should be recorded and reported on separately according to the different levels on which they are offered. For example, Home Language – English, First Additional Language – IsiXhosa, Second Additional Language – Afrikaans Second Additional Language.
7. The number of formal assessment tasks to be recorded in each phase is provided in *chapter 4* of the National Curriculum and Assessment Policy Statements.
8. The recorded pieces of evidence should reflect a variety of forms of assessment. More information on this is provided in *chapter 4* of the National Curriculum and Assessment Policy Statements.
9. Educators must report regularly to learners and parents on the progress of learners. Schools are required to provide feedback to parents on the programme of assessment using a formal reporting tool such as a report card. In addition to the report cards, other reporting mechanisms such as parents' meetings, school visitation days, parent-Educator conferences, phone calls, letters, class or school newsletters, etc. may be used. The school will determine the format of these reporting strategies.

RECORD SHEETS

1. Educators are expected to keep efficient and current mark sheets of the learners' progress. It is expected that carefully compiled records and/or evidence of learner performance be maintained to justify the final rating a learner receives at the end of the year.
2. Educators are expected to keep current records of learners' progress electronically/in files/books/folders or any other form the school has agreed on.
3. Record sheets must at least have the following information
 - a. Subject;
 - b. Grade and class;
 - c. Learners' names;
 - d. Dates of assessment;
 - e. Names of the formal assessment tasks;
 - f. The results of formal assessment tasks; and
 - g. Comments for support purposes when and where appropriate.



The record sheets should be used to compile a schedule that will in turn be used to compile reports once a term. Schools should therefore develop Record Sheets using the criteria specified in *subparagraph 3*.

LEARNERS' WORKBOOKS

- At the beginning of the year each learner should get a workbook to do activities for Natural Sciences in and to write or paste notes, etc. in.
- Work as included in the assessment tasks should first be taught thoroughly in the workbooks.
- Workbooks should be covered and kept neat.
- Each educator can make a front page of his or her choice for writing books.
- If a learner loses or damages his or her workbook, his or her parents should replace it themselves.
- Educators should mark learners' workbooks regularly and meticulously or supply the correct answers in the case of self or peer assessment.
- Corrections should be made by the learners where necessary.

INTERVENTION

- Educators should throughout be able to provide evidence of how they accommodate the learners with barriers for learning (e.g. extra activities to address problem areas, errors that are corrected, discussion with EST, letters or discussions with parents).
- Intervention should also be supported by a suitable instrument that proves attempts to support learners.

EDUCATOR'S FILE

1. All Educators are expected to keep a file containing evidence of their teaching and assessment, viz. Annual teaching plan, Assessment plan, Formal assessment tasks and memoranda, Indication of Textbook(s) and any resources used, Record sheet containing learners' marks for each formal assessment task and informal notes or any intervention that is planned by the Educator to assist learners who require additional support (where they exist). It is the Educators' responsibility to ensure that the information in their assessment files is kept up to date.
2. A Educator assessment file may be a file, a folder, a box, or any other suitable storage system.
3. The formally recorded assessment tasks should be clearly marked or indicated in the Educator's file. Stickers, coloured paper, etc. may be used for this purpose.
4. Educators' files should be available on request at all times for moderation and accountability purposes.



LEARNER PROFILE

A Learner Profile is a continuous record of information that gives a holistic impression of a learner and a learner's progress and performance. It assists the Educator in the next grade or school to understand the learner better and therefore to respond appropriately to the learner.

ADMINISTRATION

1. Learner Profiles should be kept at school and will be moved from one school to the next on the request of the principal of the next school.
2. The school management of the receiving school has an obligation to request the Learner's Profile from the previous school within three months of the learner's admittance.
3. The Learner Profile for every learner must be safeguarded and should accompany learners throughout their schooling career. The security of the Learner Profiles and the updating of required information rest with the school management.
4. The parents and other stakeholders have a right to access and view the Learner Profile on request. However, this should be done in the presence of the school management.
5. The Learner Profile is a confidential document and should be treated as such. Under no circumstances should sensitive information such as the health status of the learner be divulged to anyone without the written permission of the parents or guardians.
6. Under no circumstances should the profile be moved from the school unless it is for reasons mentioned in *subparagraph 1*.
7. The Provincial Departments of Education are responsible for providing pre-printed files /folders for the Profiles.
8. The pre-printed files/folders should be designed such that a Learner Profile includes the following information:
 - a. personal information;
 - b. medical history;
 - c. schools attended and record of attendance;
 - d. participation and achievements in extra-curricular activities;
 - e. areas needing additional support; and
 - f. learner performance.



9. In cases where the files/folders need repair, the school principal concerned should make a request to the district office for a replacement.
10. The compilation of Learner Profiles should be started at Grade R and should continue until the learner completes Grade 12.
11. Once the learner has passed Grade 12 or exited the schooling system for any reason whatsoever, the learner profile should be stored in the last school attended for a period of three years where after it should be destroyed. If the learner within this specified period re-enters the schooling system to further his or her studies, the provisos stated in *subparagraphs 1 and 3* will apply.
12. The Learner Profile replaces all previous continuous record documents that have been used by schools, such as record cards, tutor cards, Edlab cards, etc.

PHASE MEETINGS / DISCUSSIONS

- Meetings should be held at least once per month, but more often if necessary.
- Attendance is compulsory for all the educators of the foundation phase. Written excuses should be submitted the previous day.
- Minutes should be kept at each meeting by a person indicated for the specific meeting and distributed amongst the educators for filing in their educators' portfolios.

This policy was adopted by the School Management on

This policy has been made available to school personnel and is readily accessible to parents and learners on request.

This policy will be reviewed and updated every year.

Signed _____
School Management

Date: _____

Signed _____
Principal

Date: _____

Signed _____
Educator Representative

Date: _____

