

**WORKPLACE-BASED EXPERIENCE (WBE)**

# **Student Task Book**

**FINANCE, ECONOMICS AND ACCOUNTING  
NC(V) LEVEL 4**



STUDENT NAME: \_\_\_\_\_

COLLEGE: \_\_\_\_\_

HOST EMPLOYER: \_\_\_\_\_

# **Workplace-Based Experience (WBE)**

## **FINANCE, ECONOMICS AND ACCOUNTANCY TASK BOOK**

**National Curriculum (Vocational) (NC(V))  
Level 4**

**The Swiss South African Cooperation Initiative**

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The Swiss South African Cooperation Initiative (SSACI) is a public-private partnership in development. It has supported vocational training since 2001. SSACI's main aim is to open up pathways to skilled employment for young South Africans.

This task book was developed by SSACI as part of its FET College Project. It is hoped that this task book, and other logbooks developed through the FET College Project, serve as useful resources.

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## PART 1: UNDERSTANDING WBE

**Part 1** welcomes you to WBE and provides important information on the content and outcomes of your WBE.

It also provides a WBE instructions checklist, which will guide you in completing all of the necessary tasks before, during and after your WBE.

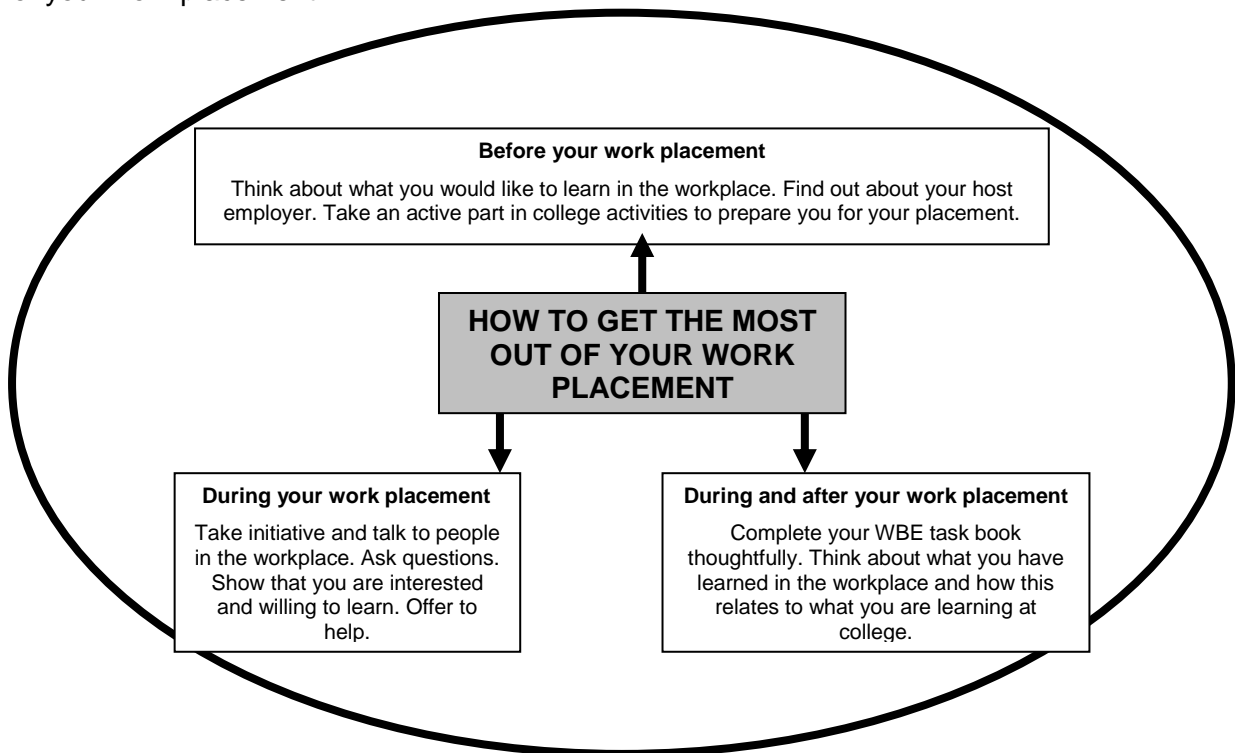
In addition, a curriculum knowledge and skills checklist is included. This checklist has two purposes. The first is to give your host employer information on what you are learning at college. This will help the employer to plan the types of work exposure and experience to provide you with during your placement. The second purpose is to provide a record of the actual workplace exposure and experience you receive during your placement.

### INSTRUCTIONS FOR PART 1

- Please **read the Introduction and Instructions** as soon as you can after getting this task book.
- **Before your placement**, complete the following documents (located in Part 4):
  - Employer and College Contact Information
  - Student Profile
  - Student Learning Agreement
  - Copy of ID or Passport
  - Indemnity Form
- **To prepare for your placement** read the Overview of WBE (section 1.3).
- Ensure that the Curriculum Knowledge and Skills Checklist is completed (**before and after your placement**).
- Complete the box indicating the person you should contact if you experience problems during your WBE placement (in section 1.2).
- Complete the “before the start of your placement” part of the **WBE Instructions Checklist**, by ticking off each task in the list after you have completed it (in section 1.2). The other parts of this checklist should be completed during and after your placement.

## 1.1 INTRODUCTION TO WBE

Welcome to workplace-based experience (WBE). For many of you this will be your first real exposure to a workplace in the field in which you are training. We hope that this will be a valuable experience for you. To gain the full benefit from your experience though, you must make the most of your time in the workplace. Take the opportunity to learn as much as you can about how your host employer operates and the kind of work your course is preparing you to do. Remember you will learn best by asking questions and, whenever possible, taking part in workplace tasks. The diagram below provides ideas on how you can get the most out of your work placement.



## 1.2 INSTRUCTIONS FOR WBE

To ensure your WBE is successful there are a number of tasks you have to complete before, during and after your placement. A one-page instructions checklist of all the things you need to do is included below. Use this list to help you keep track of what you need to do before, during and after your placement. Tick off each task when you have completed it.

From the instructions checklist you will see there are several forms you need to complete prior to your WBE placement. These forms are in Part 4 of this task book. **Please make sure ALL the forms and documents in Part 4 are completed before you start your placement.**

Lastly, if you have a problem during your WBE placement, you should call your college workplace mentor as soon as possible and discuss it with him or her. Fill in the box below to make sure you have your college workplace mentor's contact information.

Name of college workplace mentor:.....

Phone number: .....

## WBE INSTRUCTIONS CHECKLIST

This checklist contains a summary of all the tasks you need to complete for your WBE placement. Some of these tasks must be completed before the start of your work placement, others during and some after. Use the checklist to help you keep track of what you have done and what you still need to do by ticking off each task after you have completed it.

<b>THINGS TO DO BEFORE THE START OF YOUR WORK PLACEMENT</b>		<b>TICK WHEN DONE</b>
1.	If you are under 18, give your parent/guardian the letter from your college about your WBE placement (letter to be provided by your college).	
2.	Fill in the 'employer and college contact information' form (Part 4).	
3.	Fill in the 'student profile' form' (Part 4).	
4.	Complete the 'learning agreement' (Part 4). Ensure that it is signed by a college representative, an employer representative and yourself.	
5.	Get a certified copy of your ID (or passport if you do not have an ID) and paste this into your task book (Part 4).	
6.	Complete the 'indemnity form' (Part 4). If you are under 18, this needs to be signed by your parent or guardian. If you are over 18 you need to sign it.	
7.	With the help of a lecturer, tick off the curriculum knowledge and skills checklist (Part 1). Both you and your lecturer need to sign the completed curriculum checklist.	
8.	Make transport arrangements to get to your host employer. Get transport money from your college, if this is being provided.	
9.	Find out what personal protective equipment (PPE) your host employer requires and make sure you have this.	
10.	Read through your task book very carefully (especially Part 2) before your placement so you know what information you will have to find in the workplace to complete it.	
11.	Ensure you have copies of the daily journal for each day of your placement (Part 2).	
<b>COMPLETION OF TASK BOOK DURING AND AFTER YOUR PLACEMENT</b>		<b>TICK WHEN DONE</b>
12.	Complete the 'workplace induction checklist' (Part 2) on the first day of your work placement.	
13.	During and after your placement, complete the structured questions and activities (Part 2).	
14.	During your work placement, fill in your daily journal (Part 2). Ask the person who supervised you each day to sign your journal.	
15.	After your placement, evaluate your experience (Part 3).	
16.	Prepare for your WBE presentation (Part 2).	
<b>COMPLETION OF EMPLOYER SECTIONS AT THE END OF YOUR PLACEMENT, BUT BEFORE YOU LEAVE THE WORKPLACE</b>		<b>TICK WHEN DONE</b>
17.	Ask your workplace supervisor to help you tick off the areas of exposure and practice you have received in the curriculum checklist (Part 1). Both you and your supervisor need to sign the completed checklist.	
18.	Ask your workplace supervisor to complete the evaluation on you (Part 3)	
19.	Ask your workplace supervisor to complete the letter about your placement (Part 3). This letter also needs to be stamped with the workplace stamp.	
<b>PROVIDE FEEDBACK ON YOUR WORKPLACE EXPERIENCE AFTER PLACEMENT</b>		<b>TICK WHEN DONE</b>
20.	Share your experience in the workplace with your college and other students using the information gathered in the presentation activity in Part 2.	

## **1.3 OVERVIEW OF WBE**

### **1.3.1 WBE Objectives and Learning Outcomes**

#### **Objectives**

To provide you with work exposure and experience in real workplaces that is relevant to your field of study and thereby:

- Develop your understanding of the industry you are training to work in and careers in your field of study;
- Improve your competence and work-readiness; and
- Improve the alignment between the NC(V) and industry.

#### **Learning outcomes**

By the end of your WBE placement you will be able to:

- Provide a general description of the work and work processes of your host employer and / or a department in the workplace that works in your field of work;
- Discuss and comment on health, safety, security, environmental and / or legislative concerns that affect the workplace and how these apply to your career field;
- Describe in detail the full job cycle followed from planning to completion for at least one task that you were involved in during your WBE;
- Discuss and comment on how the workplace ensures the quality of its work in your field of work;
- Have a better understanding of careers in your field of study and the role that people in your field play in the world of work;
- Describe and demonstrate the practical skills you were able to develop during your placement; and
- Share your experience in the workplace with your fellow students through an oral presentation.

### **1.3.2 WBE Themes**

Your WBE placement is designed to build on what you are learning at college. It has four broad themes:

- Theme 1: Work and work processes
- Theme 2: The jobs of people who work in your career field
- Theme 3: Managing dangers and risks and complying with industry-specific legislation
- Theme 4: Quality practices: Ensuring that products and services are of a high standard



## **Theme 1: Work and work processes**

This theme focuses on financial and accounting work and work processes in business and other workplace environments. This type of work is concerned with bookkeeping and financial planning, management and control functions in a workplace. Theme 1 is designed to give you a better understanding of the kind of work you are learning to do and how this is carried out in a real workplace. The actual exposure you get will depend on the type of workplace you visit and the way it structures your time with it. However, it is hoped that during your placement you will be exposed to whole work processes from the beginning to the end of a task and to the work of different departments. This will help you to develop an understanding of the work done by the workplace and the way different departments and functions work together to make this possible.

## **Theme 2: The jobs of people who work in your career field**

The focus of this theme is on the actual work done in different kinds of jobs in your career field. During your work placement, you will observe, work with and talk to people working in your field of work. This will give you a better idea of the work you are training to do. In addition, you will be able to see how it fits into the whole work process of a workplace. Through working alongside employees in the workplace you will also have a chance to increase your knowledge and skills in your field of study.

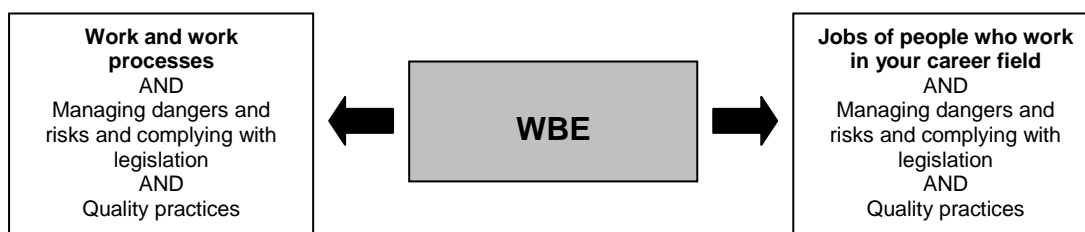
## **Theme 3: Managing dangers and risks and complying with industry-specific legislation**

Workplaces need to ensure that they do not harm their employees, clients or the environment. They also need to protect their employees, work, information and equipment from security threats and other dangers. Government legislation and workplace policy and procedure are developed to control these and other aspects of work. Every employer must comply with the legislation that applies to their industry. During your WBE you will learn about the different kinds of health, safety, security and/or environmental issues and legislation that need to be managed by your host employer. You will also see how these apply to the jobs of people who work in your field of study.

## **Theme 4: Quality practices: Ensuring that products and services are of a high standard**

'Quality' is crucial part of the work of any workplace. Good quality work is essential for employers to survive and succeed in their industry. During your work placement you will learn about how quality is practiced in a real workplace in your field of work. You will find out about your host employer's quality policy and procedures and what employees do to ensure that their work and the products or services provided, are of a high standard. You will also be exposed to the industry standards that your employer works to.

The four themes work together in the following way:



## 1.4 CURRICULUM KNOWLEDGE AND SKILLS CHECKLIST

The curriculum checklist below provides a summary of the main content areas you should have covered in your NC(V) programme by the end of the year.

**Before your work placement**, get a lecturer to help you tick off all the items in the checklist that you have already covered at college. Tick the theory column if you have only covered the item theoretically. If you have covered it theoretically and practically, tick both the theory and practice columns. Both you and the lecturer need to sign that the information included in the list is correct. This information will be useful to the workplace hosting you as it will be able to see what you know and can practically do. This will help it to provide you with relevant work exposure.

**At the end of your work placement**, ask your workplace supervisor to help you tick off the items in the checklist that you observed or were practically involved in. Both you and your workplace supervisor need to sign that the information included in the list is correct. **Make sure that your checklist is properly completed so that you have an accurate record of your workplace experience.** This will be helpful when you are trying to find work or a training or internship position.

## CURRICULUM KNOWLEDGE AND SKILLS CHECKLIST

### NC(V) Finance, Economics and Accounting

Incorporates Levels 2-4

### Overview of Subjects

Fundamental subjects	Level 2 core subjects (all compulsory)	Level 3 core subjects (all compulsory)	Level 4 core subjects (all compulsory)	
<ul style="list-style-type: none"> <li>• Language: English</li> <li>• Mathematics or Mathematical Literacy</li> <li>• Life Orientation</li> </ul>	<ul style="list-style-type: none"> <li>• Applied Accounting</li> <li>• Financial Management</li> <li>• Economic Environment</li> </ul>	<ul style="list-style-type: none"> <li>• Applied Accounting</li> <li>• Financial Management</li> <li>• Economic Environment</li> </ul>	<ul style="list-style-type: none"> <li>• Applied Accounting</li> <li>• Financial Management</li> <li>• Economic Environment</li> </ul>	
	<b>Level 2 optional subjects* (one of the options below)</b> ✓	<b>Level 3 optional subjects* (one of the options below)</b> ✓	<b>Level 4 optional subjects* (one of the options below)</b> ✓	
	<ul style="list-style-type: none"> <li>• New Venture Creation</li> <li>• Entrepreneurship</li> <li>• Office Data Processing</li> </ul>	<ul style="list-style-type: none"> <li>• New Venture Creation</li> <li>• Project Management</li> <li>• Office Data Processing</li> </ul>	<ul style="list-style-type: none"> <li>• New Venture Creation</li> <li>• Project Management</li> <li>• Office Data Processing</li> </ul>	

\*Some colleges may provide other optional subjects at level 2, 3 and 4.

<b>Knowledge and Skills</b>  Integrated summary of knowledge and skills developed across subjects and levels in the programme		Confirmation of Training and WBE Received				
		Training Received in COLLEGE <small>(to be completed by the student and lecturer)</small>		WBE received in WORKPLACE <small>(to be completed by the student and workplace supervisor)</small>		
		Theory	Practice	Observation	Practice	
KNOWLEDGE AND SKILLS FROM CORE SUBJECTS INTEGRATED IN TOPICS 1-16 BELOW						
<b>TOPIC 1</b>	Basic understanding of <b>financial management</b> in a small business	<b>Financial management concepts</b> e.g. start-up / working capital, cash flow management and profit forecasts.				
		<b>Financial controls</b> for managing a business, e.g. banking, books of accounts and financial statements.				
		Know <b>standard procedures for managing</b> taxation, assets and liabilities, cash flow and financial performance.				
		Identify suitable <b>accounting systems and support structures</b> for a business.				
		Identify <b>books of account</b> and explain how these should be kept to ensure proper financial control.				
		Assess the <b>impact of tax and other statutory expenses</b> on a business.				
		<b>Supervise financial record keeping</b> with regard to data capture and filing and storage of source documents.				
		<b>Supervise cash flow:</b> manage debtors and creditors to keep cash flow acceptable and negotiate an overdraft.				
<b>TOPIC 2</b>	Implement <b>financial planning and control functions</b> in a small business	<b>Prepare a business plan</b> for submission to a financial institution.				
		<b>Raise financial support</b> for a business: identify funding sources, complete application, determine feasibility, and enter into an agreement.				
		Decide on <b>purchase of fixed (non-current) assets</b> (using investment appraisal technique to determine highest financial return).				
		<b>Monitor actual performance of an organisation against budget</b> , determine variance and update forecasts.				
		<b>Use financial reports to control finances</b> (e.g. income statement, balance sheet, cash flow statement)				
<b>TOPIC 3</b>	Perform various basic <b>business calculations</b>	Calculate <b>prices and discounts</b> , e.g. cost price, mark-ups and mark-downs, discount on cash, etc.				
		Calculate <b>gross and net profit</b> .				
		Calculate a <b>break-even budget</b> (consider fixed and variable costs, contribution margin ratio per unit of product/service, trading expenses and break-even point).				
		Calculate <b>shrinkage</b> and suggest ways to reduce.				

KNOWLEDGE AND SKILLS DEVELOPED			Confirmation of Training and WBE Received			
			Training Received in COLLEGE		WBE received in WORKPLACE	
			Theory	Practice	Observation	Practice
TOPIC 4	Prepare budgets	Knowledge of budgeting: different kinds of budgets and incremental and zero-based budgeting techniques.				
		Analyse needs and develop a budget (taking account of business plan, past budgets and constraints).				
		Present and justify a proposed budget.				
TOPIC 5	Prepare journals, general ledger accounts and trial balance (manually or with software)	Know basic accounting principles and follow generally accepted accounting practice (GAAP).				
		Conduct basic banking transactions.				
		Administer income and receipts: complete documents, record transactions and receive and record receipts.				
		Administer payments & expenses: complete documents, record transactions and receive and record payments.				
		Administer credit sales: complete documents, record transaction and maintain debtor's accounts).				
		Administer credit purchases: complete documents, record transactions and maintain creditor's accounts.				
		Prepare general ledger accounts. Prepare initial trial balance.				
TOPIC 6	Use a standard petty cash system correctly	Correctly disburse money for petty cash transactions.				
		Record petty cash transactions correctly in the petty cash book or journal, and file petty cash vouchers.				
		Correctly calculate imprest amount to restore balance.				
		Follow petty cash control procedures correctly.				
TOPIC 7	Compile reconciliation statements (manually or with accounting software)	Compare receipts/payments to bank statement, record differences, balance journals and post to general ledger.				
		Compile a bank reconciliation statement.				
		Compile a basic debtors and creditors reconciliation statement. Compile a basic general ledger reconciliation statement.				
TOPIC 8	Prepare salaries and wages	Calculate and record gross and net earnings, and deductions and contributions (e.g. pension, UIF and tax).				
		Implement month-end procedures (post columns from salaries/wages journal to general ledger and balance).				
		Calculate and record payments to different stakeholders (e.g. SARS, pension fund and medical fund).				
TOPIC 9	Perform basic administration of non-current assets	Explain basic concepts of non-current assets.				
		Calculate depreciation on non-current assets using cost price (straight line) method and diminished balance (carrying amount) method.				
		Complete the asset register.				
		Explain asset disposal and complete calculations and records for this.				
TOPIC 10	Calculate and record value added tax (VAT) calculations	Understand VAT concepts (e.g. input and output tax, different VAT rates) and legal requirements.				
		Calculate VAT on basic transactions, record in correct journals, and post to general ledger.				
		Balance VAT control account and investigate and correct discrepancies.				
		Correctly complete required VAT return form for SARS.				
TOPIC 11	Calculate tax payable by a sole trader or small business that is single source income	Distinguish between expenses allowable / not allowable for income tax purposes.				
		Understand and calculate capital allowances.				
		Calculate all figures required to complete tax return.				
		Use SARS tables to calculate tax payable.				
		Correctly complete required tax return forms. Understand implications of concepts 'limited liability' and 'incorporation' for a small business.				

KNOWLEDGE AND SKILLS DEVELOPED			Confirmation of Training and WBE Received			
			Training Received in COLLEGE		WBE received in WORKPLACE	
			Theory	Practice	Observation	Practice
TOPIC 12	Prepare <b>financial statements</b> (manually or with accounting software)	Carry out <b>financial year end procedures/adjustments</b> to balance sheet accounts, income and expense accounts.				
		Calculate <b>financial year end gross / net profit or loss</b> in continuous stock system and show influence on capital.				
		Close <b>transfers of nominal accounts</b> .				
		Compile an <b>assets and liabilities</b> statement.				
		<b>Prepare an income and expense statement and balance sheet</b> (with notes).				
		<b>Prepare a cash flow statement</b> .				
TOPIC 13	Analyse and interpret <b>financial statements</b>	Analyse <b>income and expenditure</b> statement: determine profit or loss, financial viability and expenses to improve.				
		Explain <b>how different entries</b> in income and expenditure statement <b>effect net profit</b> (e.g. sales, cost of sales, other income, interest, tax, dividends and retained income).				
		Analyse <b>balance sheet</b> : determine net worth and performance over two years.				
		<b>Classify assets</b> in the balance sheet as fixed or current and <b>liabilities</b> as long term or current.				
		<b>Compare financial statements with business plan</b> to determine if objectives being met and problem areas.				
		Explain <b>relationship between turnover, income, revenue, sales/earnings and profit</b> .				
		Explain cash flow in terms of liquidity.				
		<b>Make financial decisions</b> based on evidence: identify strengths and weaknesses, and decide how to improve income, reduce costs and improve cash flow (liquidity).				
TOPIC 14	Introductory understanding of <b>macro and micro economics</b> as applied to SA	Explain <b>basic economic principles</b> including economic role players and institutions, and factors of production.				
		Understand role of money and <b>monetary</b> policy.				
		Explain how <b>fiscal</b> policy works.				
		Understanding of <b>financial markets</b> and market shares.				
		Explain <b>economic indicators</b> and their influence on local economy.				
		Identify and interpret <b>impact of various events</b> on a business, e.g. physical, socio-political, economic, technological and institutional.				
		Use <b>macro economic measures</b> (consumer/producer price index, inflation, gross domestic/national product, gross domestic income/expenditure and exchange rates).				
		Understanding of <b>trends in world economy</b> : economic growth, employment, price stability, balance of payment stability, and equitable distribution of income.				
TOPIC 15	Understand impact of <b>local economic development</b> environment on a business	Explain <b>supply and demand</b> in local economic development.				
		Explain <b>role of government and municipalities</b> in local economic development.				
		Identify and describe <b>legislation</b> that impacts on local economic development.				
		Explain <b>development economics</b> in relation to SA.				
TOPIC 16	Basic understanding of <b>international trade</b> and perform trade calculations	Explain <b>SA trade in context of international trade</b> .				
		Explain phase and elements of <b>international trade cycle</b> .				
		Follow <b>internationally accepted trade procedures and protocol</b> .				
		Perform <b>international trade calculations</b> , e.g. currency conversion, pricing negotiation percentages, landed/export costings, interest and proportions for allocating costs.				
		Know different <b>financial instruments for international trade</b> : bills of exchange, promissory notes, international loans, guarantees, letters of credit, telegraphic transfers.				
		Explain <b>process for initiating import/export factoring</b> .				
		Know in which conditions to use <b>import/export factoring or letter of credit</b> .				
		Explain international trade <b>financial risks</b> and approaches for managing (import/export factoring risks).				

KNOWLEDGE AND SKILLS DEVELOPED			Confirmation of Training and WBE Received			
			Training Received in COLLEGE		WBE received in WORKPLACE	
			Theory	Practice	Observation	Practice
<b>KNOWLEDGE AND SKILLS FROM 'NEW VENTURE CREATION' OPTIONAL SUBJECT INTEGRATED IN TOPICS 17 to 19 BELOW</b>						
TOPIC 17	Investigate possible new business venture	Understand <b>nature of business environment</b> of proposed new venture.				
		<b>Investigate possibility of new business venture:</b> own entrepreneurial strengths and weaknesses, potential markets, distribution channels, and possible location.				
		Understand <b>basis of financial planning</b> for new venture: profit and loss, start-up and working capital, cash flow and profit, assets and liabilities, and pricing and costing.				
		<b>Budget for a new venture:</b> determine income and expenditure, and calculate fixed and variable costs				
		Understand <b>types of contracts</b> a small business can enter into.				
		Understand <b>tax responsibilities</b> of a small business.				
TOPIC 18	Establish <b>business operations</b> for a new venture	Identify <b>internal and external stakeholders</b> for venture.				
		Develop an <b>action plan</b> for a new venture.				
		Develop a <b>code of conduct</b> for business venture				
		<b>Plan for human resource needs.</b>				
		<b>Develop employment policies, procedures and agreements.</b>				
		<b>Recruit and employ staff.</b>				
		Comply with relevant <b>human resources legislation.</b>				
		Set up <b>business premises and operational systems.</b>				
TOPIC 19	Plan for <b>financing of new venture and manage risk</b>	<b>Determine funding requirements and capital structure:</b> fixed assets, pre-operating costs, monthly operating costs, and cash flow.				
		<b>Identify a suitable funding option and its requirements</b> e.g. consider: loans versus equity (owners and other); finance industry, government and non-government options; and collateral, repayment and costs of options.				
		Compile <b>personal income and expenditure, and assets and liabilities</b> statements.				
		<b>Apply costing and pricing</b> principles: correctly calculate costs, prices, break-even point and profit mark-up.				
		<b>Identify and plan for the management of risks,</b> e.g. financial, safety and security, and stocks and assets.				
		Identify and <b>apply legislation relevant to risk management</b> (e.g. in relation to finances and people).				
<b>KNOWLEDGE AND SKILLS FROM 'ENTREPRENEURSHIP' AND 'PROJECT MANAGEMENT' OPTIONAL SUBJECTS IN TOPICS 20 AND 21 BELOW</b>						
TOPIC 20	Basic understanding of <b>entrepreneurship</b> and how to start a small business	Understand <b>entrepreneurship</b> and the characteristics of a successful entrepreneur.				
		Identify <b>entrepreneurial opportunities.</b>				
		Conduct a personal <b>SWOT analysis.</b>				
		Basic understanding of <b>customer relations and marketing</b> and how to build a market/client base.				
		Use <b>financial management</b> principles and methods to price a product/service and manage finances and stock.				
		<b>Develop a business plan</b> for a new venture.				

KNOWLEDGE AND SKILLS DEVELOPED			Confirmation of Training and WBE Received			
			Training Received in COLLEGE		WBE received in WORKPLACE	
			Theory	Practice	Observation	Practice
TOPIC 21	Understand and can use <b>project management</b> principles and techniques to plan and manage a simple project	Elementary understanding of <b>project management concepts, delivery strategies, tools and techniques.</b>				
		Understanding of project management <b>ethics.</b>				
		<b>Plan and initiate a simple project.</b>				
		Cost a project and <b>develop a budget.</b>				
		Develop a <b>project schedule</b> (with project activities, resources needed and time estimates).				
		Develop a <b>project plan</b> (with deliverables, milestones, timeframes, activities, resources and a budget).				
		Understand project <b>'leadership'</b> concepts and practices.				
		Understanding of <b>'team work'</b> concepts and how to build team relations resolve conflict and improve performance.				
		<b>Manage and monitor</b> project implementation including activities, budget, administration, project team and quality.				
		<b>Identify project risks</b> and plan for management of these.				
	<b>Review a project</b> , consolidate and document lessons.					
<b>KNOWLEDGE AND SKILLS FROM 'OFFICE DATA PROCESSING' OPTIONAL SUBJECT INTEGRATED IN TOPIC 22 BELOW</b>						
TOPIC 22	Use <b>computers</b> to process office data, create documents and communicate	<b>Touch type</b> at a speed of 30 words per minute.				
		<b>Transcribe</b> information from an audio device.				
		<b>Read manuscript or proofreaders marks.</b>				
		Understand <b>basic computer concepts</b> and use computer technology and software correctly.				
		<b>Manage computer files</b> and folders in a Microsoft Windows and Office environment.				
		Use <b>Microsoft Word</b> at an advanced level to create, edit, format and print various documents including letters, agendas, menus, advertisements, minutes and reports.				
		<b>Use the 'mail merge'</b> feature in Microsoft Word.				
		Use <b>Microsoft Excel</b> at an advanced level to create, edit, format and print spreadsheets and create charts.				
		Use <b>Microsoft Outlook</b> to work with and organise emails.				
		Navigate the <b>internet / World Wide Web</b> and make use of search engines to find information.				
		Use <b>Microsoft Access</b> to create simple databases, utilise forms and process queries and reports.				
		Use <b>Microsoft PowerPoint</b> at an advanced level to create presentations that include graphs, charts, clipart, pictures, animations, and slide transitions.				
			<b>Signatures (College)</b>	<b>Signatures (Workplace)</b>		
			..... Lecturer	..... Company rep		
			..... Student	..... Student		

## PART 2: WBE PLACEMENT ASSIGNMENTS

**PART 2** contains four assignments you need to complete during your placement.

### INSTRUCTIONS FOR PART 2

- Complete the **Induction Checklist on the first day of your placement**. This checklist will help you clarify what your host employer expects of you and how you will be supervised during your placement.
- Complete as many of the **WBE Structured Questions and Activities** as possible. **This should be completed during and immediately after your placement while your memory of it is still fresh**. You also need to ensure that your supervisor provides feedback after each activity.
- Complete the **Daily Journal during your placement at the end of each day**.
- Prepare a brief summary on your WBE. This summary can then be used for the **WBE presentation** your college may require you to do for other students and lecturers. **Complete this summary after your placement** using the information you have collected in the assignments in part 2.



## 2.1 WORKPLACE INDUCTION CHECKLIST

This induction checklist should be **completed on the first day of your placement**. It will help you clarify what your host employer expects of you and how you will be supervised during your placement. Please tick off the items in the checklist below once you have completed them. You also need to fill in the additional information required.

Item	Tick	
1. I have the name and address of my host employer.		
2. I have the name and contact number of the person in the workplace who is responsible for me during my placement.		
<i>Name of my supervisor:</i>		
<i>Contact number for my supervisor:</i>		
3. I know who I will be reporting to on a day-to-day basis in the workplace.		
<i>Names of the people I will report to daily</i>	<i>When I will report to this person</i>	
4. I have been introduced to the people I will be working with.		
5. I know the rules of my host employer.		
6. I know what my host employer expects of me while I am in the workplace.		
<i>Things they expect of me include:</i>		
<i>a)</i>		
<i>b)</i>		
<i>c)</i>		
<i>d)</i>		
<i>e)</i>		
7. I know what time I need to be at work daily and when lunch and tea breaks are. These are as follows:		
<i>Work hours:</i>		
<i>Lunch time:</i>		
<i>Tea times:</i>		
8. I have been given a tour of workplace premises and will be able to find my way around.		
9. If I have a problem during my placement I know what to do.		

## 2.2 WBE STRUCTURED QUESTIONS AND ACTIVITIES

To make the most of your WBE placement please complete as much of this section as possible.

You do not need to do the activities or answer the questions in a particular order. The information you collect on a day-to-day basis will depend on how your host employer structures your placement. As you get information, you can fill it in.

This section provides an opportunity for you and your host employer to monitor your progress during your placement. Space is provided at the end of each activity for your supervisor to note his or her feedback on how you completed the activity.

### ACTIVITY 1: OVERVIEW OF THE WORKPLACE AND THE ROLE PLAYED BY PEOPLE IN YOUR CAREER FIELD

1. What does the workplace hosting you do? Name some of its products and/or services.

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2. Name the main departments/sections that make up the workplace. Then say what work is done by each department.

Names of main departments found in workplace	Overview of work of each department

3. Name up to three job types/titles in the workplace that are in your field of work. Note in which department(s) these jobs are found. Then say what the role of each of these jobs is in the workplace.

Job types/ titles in your work field	Department(s) in which jobs are found	Role played by these jobs in the workplace

<b>Supervisor Feedback</b>	
Supervisor's Name: _____	
Date: _____	
Comments: (is the information recorded accurate, was information gathered in an acceptable manner to the company): _____	
Supervisor's Signature: _____	Student's Signature: _____

**ACTIVITY 2: PROTECTING EMPLOYEES, CLIENTS, THE WORK BEING DONE AND THE ENVIRONMENT FROM RISKS AND HARM**

1. List the main health, safety, security and/or environmental dangers or risks that your host employer has to guard against (in the left column). Then note who or what needs to be protected from each danger or risk (in the right column).

Main dangers or risks	Who or what to protect

2. What are the main rules and procedures that your employer has developed to protect its employees and clients, its work, information and equipment, and the environment from risks and harm? Complete the table below.

Rule or procedure	Purpose of this rule or procedure

3. What main legislation governs your employer’s management of dangers and risks to its work, employees, clients and the environment?

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4. How would your employer manage the situation if there was an injury or a security violation (that affected employees, clients or its work, information and equipment)?

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Supervisor Feedback	
Supervisor’s Name:	
Date:	
Comments: (is the information recorded accurate, was information gathered in an acceptable manner to the company):	
Supervisor’s Signature: _____ Student’s Signature: _____	

**ACTIVITY 3: DEEPENING YOUR UNDERSTANDING OF THE CAREER PATH YOU HAVE CHOSEN**

To assist you in fully understanding the career path you have chosen, you need to interview someone who works in your field of study about his or her job and career development path. The interview will help you learn about what it is like to work in your career field and career progression possibilities. To get the information you need, it is best that you interview someone who has been working for ten or more years in your field of work. It is not necessary that they have worked for the same employer for this period.

**You will need to get permission from the person in charge** of you to approach someone in the workplace to conduct this interview. Once you have this permission, you need to find a suitable person to interview. Your supervisor might be able to make some suggestions. Approach the person you want to interview and explain the purpose of the interview. Ask if he or she would be willing to participate. Note that the interview will take about 15 minutes. If the person is unable or unwilling to participate, approach another person. Once you have found someone who is willing to be interviewed, arrange a date and time to do the interview.

Prepare for the interview by reading through and thinking about all the questions you need to ask before the interview. If there is more than one level 4 student at the workplace at the same time as you, you could conduct this interview together. This might be better for the workplace as it would take less time. However, if you do this you need to write up the interview separately.

**Interview questions**

- 1) Name of interviewee.....
  
- 2) What is your job title? .....
  
- 3) When did you start working for this workplace? .....
  
- 4) What is your immediate superior's job title? .....
  
- .....
  
- 5) What, if any, positions do you supervise? .....
  
- .....
  
- .....
  
- 6) What are your main duties? .....
  
- .....
  
- .....
  
- .....

7) What skills and personal qualities do you need to do your job?

<b>Specific skills needed</b>	<b>Personal qualities needed</b> (e.g. patience, neatness, attention to detail, get on well with others, etc.)

8) What kind of training and qualifications do you need to do your job?

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9) What are the most interesting/enjoyable aspects of your job?

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10) What are the least interesting/enjoyable aspects of your job?

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11) Where did you work before and what did you do there?

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12) What factors have affected your career path in general (from your first job to the current job) and more specifically in the workplace you are currently employed?

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13) What career opportunities are available in the workplace?

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14) What advice on how to succeed would you give to someone coming into your field of work?

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Supervisor Feedback	
Supervisor's Name:	
Date:	
Comments: (is the information recorded accurate, was information gathered in an acceptable manner to the company):	
Supervisor's Signature: _____	Student's Signature: _____

## ACTIVITY 4: DETAILED REPORT ON ONE TASK CARRIED OUT IN THE WORKPLACE

In this section you need to report on one task you observed or were involved in from the planning and preparation stage to its completion. Depending on the kind of task, it might have taken a few hours to complete or a number of days. Examples of tasks you could report on include:

• Record financial transactions (e.g. cash receipts / payments and credit sales / purchases)	• Review legislation that could impact on local economic development and report on how this might affect a business sector
• Prepare for a VAT return and complete forms required by SARS	• Research and report on economic opportunities for a product in an area
• Prepare reconciliation statements (e.g. bank, debtors and creditors, or general ledger)	• Calculate income tax payable and complete a tax return
• Prepare salaries and wages (calculate and capture deductions and gross / net earnings)	• Analyse and interpret financial statements and report on financial performance
• Process adjustments and prepare a trial balance	• Investigate and report on funding options for a business or project
• Prepare financial statements (income and expense, and balance sheet)	• Research and report on international trade financing options for a specific business
• Develop a budget	• Prepare a business plan

Choose a task to report on that will allow you to say something about the following aspects:

- The planning and preparation done before work on the task began
- The step-by-step process followed to do the task
- The safety, security and/or legal precautions taken
- The tools, equipment and/or resources used
- The checks or tests done during and after the task was completed
- The administrative (completing records or reports) and/or housekeeping (tidying up or cleaning) activities that followed the completion of the task

It might be that during your placement you do not participate in any tasks from beginning to end. If this is so, try and find out what happened in the steps you did not participate in for the task you are reporting on. Ask the person who did the work or your supervisor about it.

### 1. Overview of task completed

Name of task: .....

Task start date: ..... Task end date: ..... Total time to complete: .....

Department(s) in which the task was done .....

.....

Names and job titles of the main people involved in doing the task

Names	Job titles

Summary of what was done: .....

.....

.....



Why was this task done? .....

.....

.....

.....

## 2. Detailed description of work process followed to complete the task

### PREPARING TO DO THE TASK

Before a task is done, various activities are usually carried out to ensure that the work can be done correctly and to required standards. Complete the table below on the preparation activities carried out.

Were any of the following things done before the task was carried out? Tick yes or no.				
• <b>Instructions</b> were obtained on what to do	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• <b>Permission</b> to do the task was obtained (to meet safety, security, policy or legal requirements)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• Made sure the <b>equipment and/or resources</b> to do the task were available and/or in working order (e.g. photocopier, printer, paper, brochures, computer, database, stationery, and work plan)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• <b>Communicated</b> with people to be affected by or involved in the work, e.g. colleagues or clients	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• Developed a <b>plan / schedule</b> for the task to be completed	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did any other preparation activities take place? If yes, list them below.				

### DOING THE TASK

This section focuses on how the task was done. There are four parts. In the first, you must indicate what kind of work instruction or guideline was followed. In the second, you must note what work processes were used. In the third, you must describe how the task was completed. In the last, you need to describe the role you played in the task.

1) NATURE OF THE INSTRUCTIONS OR DIRECTIONS FOLLOWED TO DO THE TASK				
Were any of the following kinds of instructions or directions followed when the task was done? Tick yes or no. More than one answer can be ticked.				
• The task was completed on the basis of a <b>verbal instruction</b>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• The task was completed on the basis of an email or other <b>written instruction</b>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• A <b>workplace procedure</b> was followed	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
• The task was done according to a <b>work plan</b>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Was any other sort of instruction or guideline used? If yes, explain below.				



Were any specific health, safety, security, environmental or legal precautions taken during the completion of the task? Tick yes or no.	Yes		No	
If yes, what precautions were taken and why?				
Was anything checked or tested <b>while the task was being completed?</b>	Yes		No	
If yes, what checks or tests were done and why?				
What role did you play in doing this task? Did you observe or participate? If you participated, what did you do?				

## AFTER THE TASK HAS BEEN COMPLETED

In this section you need to report on post-task activities. There are five parts in the section. The first looks at how the completed task was checked or tested. The second looks at precautions taken after the task was completed (e.g. health, safety, security, environmental or legal). The third looks at post-task communication. The fourth looks at the kinds of administration activities that were completed after the task. The final part looks at the tidying and cleaning-up (housekeeping) that followed the task.

<b>1) CHECKING OR TESTING THE COMPLETED WORK</b>				
When a task has been completed, the work done is usually checked or tested to ensure that it meets requirements and everything has been completed or is working as it should be, that it is of a good quality, and that users/colleagues or clients are satisfied.				
Was any checking or testing done <b>after the task was completed</b> ? Tick yes or no. If yes, complete the questions below.			Yes	No
What was checked or tested?	How was this checked or tested?	Why was this check or test done?	Who did the check or test?	
Did the checks or tests show that there were any problems? Tick yes or no.			Yes	No
If yes, note at least one problem identified in the left hand column and what was done to solve this in the right hand column.				
Problem identified		Solution to the problem		

<b>2) HEALTH, SAFETY, SECURITY, ENVIRONMENTAL OR LEGAL PRECAUTIONS TAKEN AFTER THE TASK WAS COMPLETED</b>				
Were any specific health, safety, security, environmental or legal precautions taken after completing the task? Tick yes or no.			Yes	No
If, yes describe these.				

**3) POST-TASK COMMUNICATION**

After a task or job has been completed, there is usually some form of communication on what was done and how well it was done. Communication may take the form of oral or written reports. Report-back or evaluation meetings are also sometimes held. Post-task communication is usually directed at project teams, managers, users and clients.

Describe the communication process that followed the completion of the task. What sort of reporting took place? Were there any post-task meetings? If yes, what meetings took place and who was involved in these?


**4) POST-TASK ADMINISTRATION**

Various administration activities may also be necessary after completing a task. For instance, records are completed and filing (electronic and paper) is done to ensure that all information is available for future reference. Thank you letters and user/customer satisfaction surveys may also need to be administered.

Describe some of the administration activities that were carried out after the task was completed. Note what was done and who did the work.


**5) TIDYING UP AND CLEANING (HOUSEKEEPING) AFTER COMPLETING A TASK**

After a task has been completed, it is often necessary to tidy and clean up. This is done to ensure that the work environment is left clean and safe and the resources and equipment used are filed or packed away and correctly stored. This kind of 'housekeeping' is done in both the physical workspace and computer environment.

Did any 'housekeeping' take place after the task was completed?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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If yes, describe what was done and why.


**3. Assessment of the task completion process and what you learned**

The last part of this activity requires you to think about and assess the way the task was completed. You also need to think about and reflect on what you learned from observing or participating in the task. Answer the questions that follow.

How effectively was the task carried out? Did any problems occur?


Do you think the work process used to complete this task could be improved in any way? Give reasons for your answer.


What did you learn from observing or participating in this task?


Supervisor Feedback	
Supervisor's Name: _____	
Date: _____	
Comments: (is the information recorded accurate, was information gathered in an acceptable manner to the company): 	
Supervisor's Signature: _____ Student's Signature: _____	

## 2.3 DAILY JOURNAL

Follow these instructions for completing the daily journal:

- Make a journal entry for each day you are in the workplace.
- Make sure that your task book includes enough copies of the journal page for each day of your placement. If necessary, you or your lecturer can make additional copies and insert them in your task book. If the journal page does not have enough space, you can paste or staple more pages into your task book.
- Your journal should be a daily record of your workplace experience and your thoughts about this. Use it to describe what you see, do and experience each day. Mention tasks, projects or meetings you participated in. Make a note of any special events that occurred, like a power failure or safety drill. Include drawings, calculations or workplace documents, if you would like to. Your journal is also a place for you to comment on what you have learned or how your experience made you feel.
- Ask the person who supervised you each day to sign off for that day in the place provided and, if they would like to, make a comment about how the day went.

If you are struggling to think of things to write, you can use the following questions to get you started:

- What activities I did I observe and/or participate in today?
- Was there a link between the activities I did today and what I have learned in college? Did my college training help me to perform the tasks completed today more effectively?
- What was the most interesting thing I did today? Why did I think it was interesting?
- What was the most challenging thing I did today? Why did I think it was challenging?
- What was the most boring thing I did today? Why did I think it was boring?
- What did I do well today? How does that make me feel?
- What didn't I do so well today? How does that make me feel?
- If I have the chance to do this activity again, will I do it differently? In what way?
- Is there anything I think the host employer should do differently or more effectively?

**JOURNAL: DAY NUMBER \_\_\_\_\_**

**Date**.....

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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To be completed by the student's supervisor for the day		
Name:	Job title:	
Comments (if any):		
Supervisor's Signature: _____ Student's Signature: _____		



**JOURNAL: DAY NUMBER** \_\_\_\_\_

**Date**.....

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....  
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Names and job titles of the people you worked with during the day

Name	Job title

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To be completed by the student's supervisor for the day		
Name:	Job title:	
Comments (if any):		
Supervisor's Signature: _____ Student's Signature: _____		

JOURNAL: DAY NUMBER \_\_\_\_\_

Date.....

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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To be completed by the student's supervisor for the day		
Name:	Job title:	
Comments (if any):		
Supervisor's Signature: _____		Student's Signature: _____



**JOURNAL: DAY NUMBER \_\_\_\_\_**

**Date.....**

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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<b>To be completed by the student's supervisor for the day</b>	
Name:	Job title:
Comments (if any):	
Supervisor's Signature: _____ Student's Signature: _____	

**JOURNAL: DAY NUMBER \_\_\_\_\_**

**Date.....**

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....  
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Names and job titles of the people you worked with during the day

Name	Job title

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To be completed by the student's supervisor for the day	
Name:	Job title:
Comments (if any):	
Supervisor's Signature: _____	Student's Signature: _____

**JOURNAL: DAY NUMBER** \_\_\_\_\_

**Date**.....

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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<b>To be completed by the student's supervisor for the day</b>		
Name:	Job title:	
Comments (if any):		
Supervisor's Signature: _____ Student's Signature: _____		

**JOURNAL: DAY NUMBER \_\_\_\_\_**

**Date.....**

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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<b>To be completed by the student’s supervisor for the day</b>	
Name:	Job title:
Comments (if any):	
Supervisor’s Signature: _____ Student’s Signature: _____	

**JOURNAL: DAY NUMBER \_\_\_\_\_**

**Date**.....

Time in .....

Time out .....

Department(s) / section(s) you visited or worked in.....

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Names and job titles of the people you worked with during the day

Name	Job title

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To be completed by the student's supervisor for the day	
Name:	Job title:
Comments (if any):	
Supervisor's Signature: _____	Student's Signature: _____





## 2.4 WBE Presentation

Use the headings below to prepare a brief summary on your WBE. If you need to make a presentation to your lecturers and other students you can refer to the information in this section.

1. Where did you do your WBE?
2. What does the workplace do?
3. Name a few of the jobs in your field of work that are found in the workplace?
4. What role do people working in your field of work play in the workplace?
5. What is your impression of the way people in the workplace relate to each other and work together?
6. Provide a summary of the main things you were involved in and learned during your placement.
7. Was this learning experience valuable for you? Give a reason for your answer.
8. What advice would you give to another student about to go into a WBE placement?

### **Helpful tips for making your presentation:**

- Bring at least ONE resource to enhance your presentation (for example: a picture of the workplace you visited; a workplace brochure; a task instruction or specification; a policy or procedure; or an agenda of a meeting you attended).
- Use notes (in whatever form) appropriately and sparingly.
- Speak clearly and pace yourself (don't speak too fast).
- Make eye contact with your audience.

## PART 3: WBE EVALUATION

**Part 3** gives you, your college mentor and your host employer an opportunity to evaluate your WBE placement.

### INSTRUCTIONS FOR PART 3

- The **Self Evaluation** gives you an opportunity to evaluate your workplace-based experience. **This needs to be completed at the end of your placement.**
- The **College WBE Mentor Evaluation** provides space for your college workplace mentor to comment on your placement and your task book. **This section will be completed by your mentor during or after your placement.**
- The **Employer Evaluation** provides the opportunity for your host employer to evaluate your performance during your placement. **You need to make sure that this is completed before you leave the workplace.**
- The **Employer Confirmation Letter** confirms your placement with the employer and indicates what work experience you received. **Make sure that this is completed before you leave the workplace and that the employer puts its stamp at the top of the letter.**

### 3.1 STUDENT EVALUATION OF WBE

**INSTRUCTIONS FOR COMPLETING THE EVALUATION**  
Answer the questions that follow about your workplace experience.

1. Did you feel adequately prepared by your college for your work placement? Explain your answer. For instance, did you have some information about the employer hosting you? Did you know what would be required of you and how to complete your task book?

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2. Was your workplace-based experience relevant to what you have learned in your programme at college? If yes, give a few examples of how it related to this.

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3. Rate and comment on the value of your workplace-based experience.

Not at all useful	Not that useful	Fairly useful	Very useful	Extremely useful

Give reasons for your rating .....

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.....

What did you find most valuable about your workplace-based experience?

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.....

What did you find least valuable about your workplace-based experience?

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4. How do you think your experience could have been improved?

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5. Do you have any other comments?

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### 3.2 COLLEGE MENTOR COMMENT

**INSTRUCTIONS**

This section has been provided for your college workplace mentor to comment on your placement and task book. If your mentor visits you while you are in the workplace, he or she may write a comment at this point. Otherwise, he or she will comment after you have completed your placement and handed in your task book.

(To be completed by college mentor)

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Mentor name	Signature	Date

### 3.3 EMPLOYER EVALUATION OF STUDENT

Please complete the following evaluation on the student hosted.

Name of student .....

1. Rating of students. Circle the number that best applies in each case where 1 = very poor, 2 = poor, 3 = fair, 4 = good, and 5 = very good.

ITEM BEING RATED	RATING				
<b>Vocational and technical knowledge.</b> The student displayed knowledge of his/her career field appropriate to his/her level of study.	1	2	3	4	5
<b>Practical competence.</b> The student was able to effectively carry out tasks at a level appropriate to his/her level of training.	1	2	3	4	5
<b>Ability to learn.</b> The student was able to easily learn new things.	1	2	3	4	5
<b>Interest in work.</b> The student asked questions and showed an interest in the work.	1	2	3	4	5
<b>Takes initiative.</b> The student looked for work to do and acted voluntarily.	1	2	3	4	5
<b>Communication skills.</b> The student was able to make her/himself adequately understood and could follow spoken and written instructions.	1	2	3	4	5
<b>Punctuality.</b> The student arrived at work on time and kept time.	1	2	3	4	5
<b>Works neatly and cleans up afterwards.</b> The student produced neat work and willingly engaged in the process of cleaning up after completing a task.	1	2	3	4	5
<b>Health, safety, security and legality.</b> The student understood and followed industry-relevant health, safety, security and legal practices.	1	2	3	4	5
<b>Attitude and cooperation.</b> The student showed willingness and had a good attitude and was able to get along with others.	1	2	3	4	5

2. Overall comments on the student's performance

.....

.....

.....

.....

3. Does the student display the qualities you would look for in an employee? Please explain.

.....

.....

.....

Name..... Job title.....

Signature .....

### 3.4 EMPLOYER LETTER TO CONFIRM STUDENT WORK EXPERIENCE PROVIDED

Employer letterhead/stamp

Date.....

Confirmation of student work experience

This letter serves to confirm that .....(name of student) spent .....(number of days) with .....(name of employer) from ..... to ..... (placement dates) to gain workplace experience. At the time, the student was completing level 2 / level 3 / level 4 (circle relevant year of study) of the National Certificate (Vocational) in ..... (name of programme) at ..... (name of college).

Key areas in which work exposure and experience were provided include:

.....  
.....  
.....  
.....  
.....  
.....

.....  
Name of employer representative

.....  
Job title

.....  
Signature

## PART 4: WBE DOCUMENTATION

**Part 4** includes information on your host employer, your college and you. It also contains the learning agreement and indemnity you will sign and space for a copy of your ID.

### INSTRUCTIONS FOR PART 4

**Before you start your placement**, complete the following documents:

- Employer and college contact information
- Student profile and contact information
- Student learning agreement
- Copy of ID
- Indemnity form



## 4.1 EMPLOYER AND COLLEGE CONTACT INFORMATION

### Employer contact information

Name of employer		
Address of employer		
Employer phone number		
Main employer contact person	Name	
	Contact number	
Second employer contact person	Name	
	Contact number	

### College contact information

Name of college		
Information on the college campus at which the student is based	Name of campus	
	Campus address	
	Campus phone number	
WBE Coordinator	Name	
	Contact number	
College WBE mentor	Name	
	Contact number	

## 4.2 STUDENT PROFILE AND CONTACT INFORMATION

Full name					
Student contact number					
Address					
Name of parent/guardian				Contact number parent/guardian	
ID number				Age	
Name of medical aid (if you have one)				Medical aid no.	
Drivers licence	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Means of transport
Last school attended				Highest school qualification	
NC(V) programme				Level	
Why I chose to study this NC(V) programme					
My future goals					
What I hope to learn during my WBE placement					
Previous WBE experience I have had					

### 4.3 STUDENT LEARNING AGREEMENT

Congratulations! You have been selected to participate in WBE at your college. This is a wonderful opportunity for you to learn about your chosen occupation and improve your employment prospects.

You will be placed at (employer) .....

for..... days, from (start date)..... to (end date).....

You need to remember that you are now an ambassador for your college. Your behaviour during your WBE placement therefore needs to be excellent. During your WBE placement you need to comply with your college's code of conduct as well as the rules of your host employer. Any problems or discipline matters that arise will be managed by your college.

**During your WBE placement you will be required to:**

- Maintain professional behaviour at all times
- Follow the instructions of the workplace representatives responsible for you
- Comply with workplace rules and regulations. This includes following the dress code and wearing any personal protective equipment (PPE) required
- Be punctual and adhere to the work hours required of you
- Take responsibility for making your workplace experience valuable
- Complete the activities in your task book
- Ensure that your host employer completes and signs off the required sections in your task book

**When you return to the college you will be required to:**

- Hand in your fully completed task book
- Give feedback on your WBE experience

Student	For the college	For the employer
Name	Name	Name
Signature	Signature	Signature
Date	Date	Date

**4.4 CERTIFIED COPY OF ID OR PASSPORT (Paste in)**

## 4.5 INDEMNITY FORM

### INSTRUCTIONS FOR COMPLETING THE INDEMNITY FORM

- If you are under 18, your parent or guardian needs to complete the indemnity form and sign it. If you are over 18, you need to complete and sign it yourself.
- Depending on who completes the form, cross out the part that is not relevant. For instance, if you complete and sign the form, cross out the phrase 'parent guardian of the trainee' at the top of the form.

I \_\_\_\_\_ (full name and surname), the parent/guardian of the trainee / the trainee (cross out part not relevant), hereby indemnify \_\_\_\_\_ (name of temporary host employer), its employees and its agents against any claims of any nature whatsoever which may be brought against them by the trainee, \_\_\_\_\_ (full name and surname of the trainee) or any third party or other person claiming on behalf of the trainee arising out of the trainee's death or injury or loss of or damage to the trainee's property as a result of entering into and remaining on \_\_\_\_\_ (name of temporary host employer)'s premises, whether the claim is based on \_\_\_\_\_ (name of temporary host employer) negligence or on the negligence of any of its employees or agents for which they may be liable.

\_\_\_\_\_  
Name (full name and surname)

\_\_\_\_\_  
Designation (parent/guardian or trainee)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date