

**SUPERVISE STOCK COUNTS**

**LEARNER ASSESSMENT GUIDE**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**U/S 118043**



|  |  |
| --- | --- |
| **LEARNER NAME AND SURNAME:** |  |
| **LEARNER ID NUMBER:** |  |
| **LEARNER CONTACT NUMBER:** |  |
| **EMPLOYER (STORE):** |  |
| **EMPLOYER CONTACT NUMBER:** |  |
| **OVERALL ASSESSMENT OUTCOME**  **(C/NYC):** |  |
| **DATE:** |  |



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**SOUTH AFRICAN QUALIFICATIONS AUTHORITY**

**REGISTERED UNIT STANDARD:**

# Supervise stock counts

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SAQA US**  **ID** | **UNIT STANDARD TITLE** | | | |
| 118043 | Supervise stock counts | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Retail and Wholesale | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 11 - Services | | | Wholesale and Retail | |
| **ABET BAND** | **UNIT**  **STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular | Level 4 | NQF Level 04 | 8 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA**  **DECISION**  **NUMBER** |
| Reregistered | | 2012-07-01 | 2015-06-30 | SAQA  0695/12 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2016-06-30 | | 2019-06-30 | | |

**Specific Outcomes and Assessment Criteria:**

**SPECIFIC OUTCOME 1**

Supervise stock count preparation.

## ASSESSMENT CRITERION 1

The required stationary and/or administrative functions are checked and verified for the count as per organisational procedures.

## ASSESSMENT CRITERION 2

Sections and/or stock to be counted are identified according to the requirements of the stock count.

## ASSESSMENT CRITERION 3

Stock count preparation is verified for completeness according to the organisation's stock count procedures.

## ASSESSMENT CRITERION 4

Operational system that would impact on the stock count are implemented according to the organisation's procedures.

**ASSESSMENT CRITERION RANGE**

Operational systems include but are not limited to time of counts, stock cut off.

**SPECIFIC OUTCOME 2**

Prepare staff for a stock counts.

## ASSESSMENT CRITERION 1

Staff are scheduled for the stock count according to the requirements of the stock count.

## ASSESSMENT CRITERION 2

Staff are trained in the requirements for the preparation and counting of stock according to organisational procedures.

## ASSESSMENT CRITERION 3

Duties are allocated and communicated to staff according to stock count procedure.

**SPECIFIC OUTCOME 3**

Oversee the counting process.

## ASSESSMENT CRITERION 1

Staff are monitored to ensure compliance to required stock count procedures. **ASSESSMENT CRITERION 2**

Stock counts are verified to meet the organisation's stock counting standards.

## ASSESSMENT CRITERION RANGE

Stock counting standards include accuracy, all required stock is counted, counted within the time frames, counts are recorded correctly.

## ASSESSMENT CRITERION 3

Stock count queries and exceptions are actioned/authorised according to organisation requirements.

**SPECIFIC OUTCOME 4**

Supervise post stock count procedures.

## ASSESSMENT CRITERION 1

Post stock count administrative requirements are implemented following organisation's procedures.

## ASSESSMENT CRITERION 2

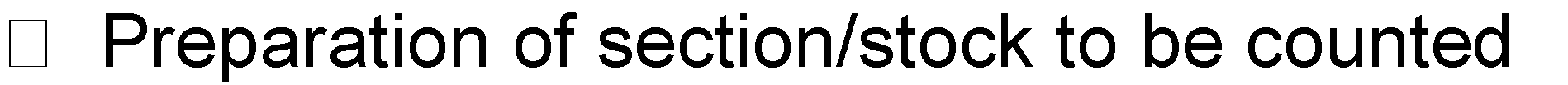
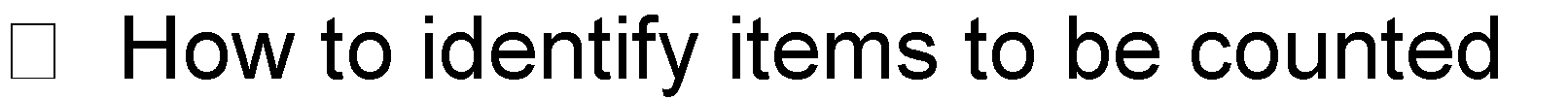
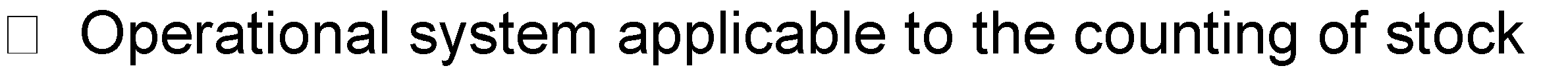
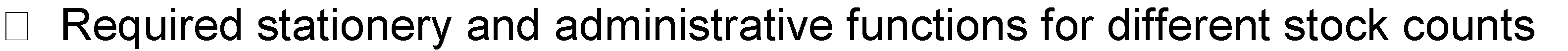
Evidence of stock counts are verified to have been removed from the stock count area/s as per organisation requirements.

## ASSESSMENT CRITERION 3

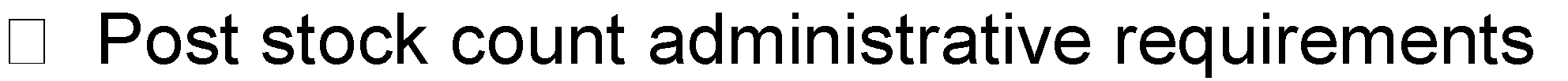
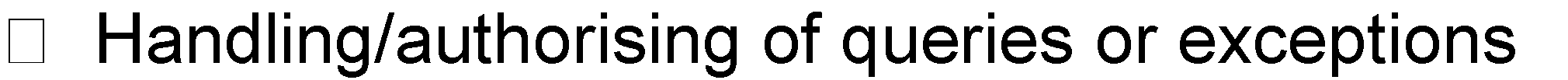
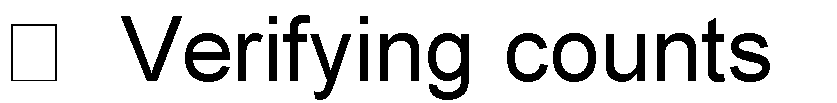
An analysis of the stock count preparation and counts process is carried out and an action plan compiled to improve future stock counts.

# UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

A demonstrated understanding of the following embedded knowledge as it applies to the management of a stock count



count



**Critical Cross-field Outcomes (CCFO):**

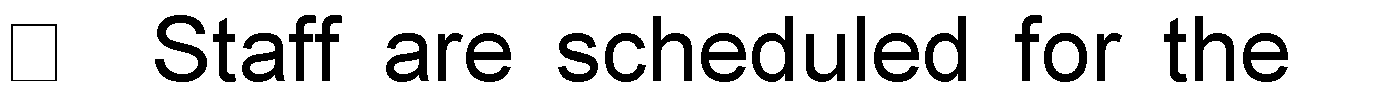
# UNIT STANDARD CCFO IDENTIFYING

Specific Outcome 3: Oversee the counting process Assessment criteria



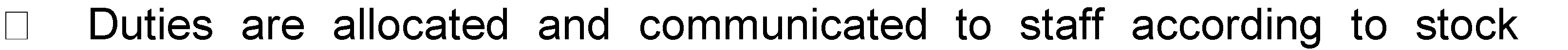
organisation requirements.

# UNIT STANDARD CCFO WORKING

Specific Outcome 2: Prepare staff for a stock counts Assessment criteria stock count according to the requirements of the

stock count.



according to organisational procedures. count procedure.

# UNIT STANDARD CCFO ORGANISING

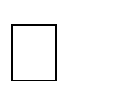
Specific Outcome 1: Supervise stock count preparation Assessment criteria

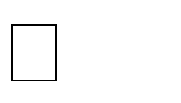


for the count as per organisational procedures.



of the stock count.

 Stock count preparation is verified for completeness according to the organisation's stock count procedures.

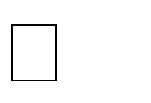
Operational system that would impact on the stock count are implemented according to the organisation's procedures.

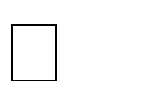
Range: Operational systems include but are not limited to time of counts, stock cut

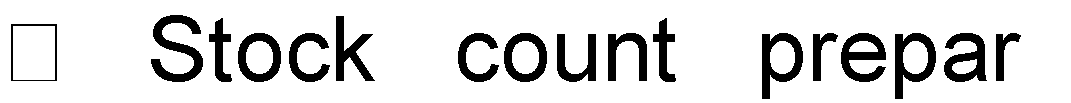
# UNIT STANDARD CCFO COLLECTING

Specific Outcome 1: Supervise stock count preparation

Assessment criteria

The required stationary and/or administrative functions are checked and verified for the count as per organisational procedures.

Sections and/or stock to be counted are identified according to the requirements of the stock count.

ation is verified for completeness according to the

organisation's stock count procedures.

Specific Outcome 4: Supervise post stock count procedures Assessment criteria



an action plan compiled to improve future stock counts.

# UNIT STANDARD CCFO COMMUNICATING

Specific Outcome 2: Prepare staff for a stock counts Assessment criteria



stock count.



according to organisational procedures.



procedure.

# UNIT STANDARD CCFO DEMONSTRATING

Specific Outcome 1: Supervise stock count preparation Assessment criteria



according to the organisation's procedures.

Range: Operational systems include but are not limited to time of counts, stock cut off.

Specific Outcome 4: Supervise post stock count procedures. Assessment criteria



organisation's procedures.

# ASSESSMENT NOTIFICATION AND ASSESSMENT PLAN

## 118043: Supervise Stock Counts Performance

This is to notify all Role Players that the Assessment for the above Unit Standard is scheduled to take place as follows:

|  |  |  |
| --- | --- | --- |
| **ASSESSMENT DATE and TIME** | **ASSESSMENT METHODS** | **NOTE TO THE LEARNER** |
|  | **LEARNER WORKBOOK**: Formative Assessment Contains  Activities, a Knowledge Test and Workplace related Activities | **The Facilitator will mark the activities and Knowledge Questionnaire in the Learner Workbook.**  **The Assessor must acknowledge receipt of the Learner Workbook by signing on the cover in the allocated space and must check that all tasks have been completed**  **Workplace evidence MUST be inserted into the Learner Workbook where required. If not, learners have to be requested to provide the evidence.** |
|  | **PRACTICAL APPLICATION/OBSERVATION:**  An observation or Practical Application in the form of: An Observation, Practical Activity or Mini Portfolio. In all cases evidence will have to be submitted | **A structured application will need to take place and you will be evaluated by the Assessor as per the checklists in this Assessment Guide** |
|  | **WORKPLACE LOGBOOK ACTIVITIES:**  Workplace related activities that need to be completed in the workplace and evidence from the workplace needs to be attached as requested – Workplace Coach to sign off the Workplace Log sheet at the end of the Logbook. | **The Assessor is responsible for the co-ordination and completion of ALL the Summative Assessment**  **Instruments in the Assessment Guide**    **Assessor to double check that all the pre-assessment and post-assessment forms are completed and SIGNED by the learner and self.** |
|  | **KNOWLEDGE QUESTIONNAIRE IN THE ASSESSMENT GUIDE**  Test that is written at the end of the training session. This test will not be an open book test. Learners need to prepare for the test by completing the Knowledge Questionnaire in the Learner Workbook |

**7 |** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

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| --- | --- | --- |
| **ASSESSMENT PLAN : 118043 Supervise Stock counts Performance** | | |
| **Assessment Instruments:**  **KQ: Knowledge Questionnaire in Assessment Guide Note to the Learner**:  **KT: Formative Knowledge Test in Learner Workbook** ALL the Formative and Summative Tasks  **BO: Behavioral Workplace Observation** must be completed for the Assessor to make  **LWBK ACT: Learner Workbook Activity** a competency decision  **WP Act: Workplace related Activity in the LWBK**  **CS: Case Study** | | |
| **Learning outcome AND Assessment**  **Criteria** | **Formative** | **Summative** |
| **SPECIFIC OUTCOME 1:** Supervise stock count preparation | | |
| AC 1: The required stationery and/or administrative functions are checked and verified for the count as per organisational procedures. | LWBK ACT 1 | KQ 2 |
| AC 2: Sections and/or stock to be counted are identified according to the requirements of the stock count. | LWBK ACT 1 | MINI POE TASK 1 |
| AC 3: Stock count preparation is verified for completeness according to the organisation`s stock count procedures. | LWBK ACT 1 | MINI POE TASK 1, 2, 3 = preparation processes |
| AC 4: Operational system that would impact on the stock count are implemented according to the organisation`s procedures. | LWBK ACT 1 | MINI POE TASK 1.1    KQ 7 |
| **SPECIFIC OUTCOME 2:** Prepare staff for a stock counts |  |  |
| AC 1: Staff is scheduled for the stock count according to the requirements of the stock count. | LWBK ACT 2 WPLBK ACT1 | KQ 4  MINI POE TASK 1 |
| AC 2: Staff is trained in the requirements for the preparation and counting of stock according to organisational procedures. | LWBK ACT 2  WPLBK ACT1  WPLBK ACT 2 | MINI POE TASK 2    KQ 6 |
| AC 3: Duties are allocated and communicated to staff according to stock count procedure. | LWBK ACT 2 WPLBK ACT 2 | MINI POE TASK 1 & 2 &3 |
| **SPECIFIC OUTCOME 3:** Oversee the counting process. |  |  |
| AC 1: Staff is monitored to ensure compliance to required stock count procedures. | LWBK ACT 3    WPLBK ACT 4 | MINI POE TASK 4    KQ 11 |
| AC 2: Stock counts are verified to meet the organisation`s stock counting standards. | LWBK ACT 3 WPLBK ACT 4 | MINI POE TASK 4 |

**|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

|  |  |  |
| --- | --- | --- |
| AC 3: Stock count queries and exceptions are actioned/authorised according to organisation requirements. | GRP ACT 1    WPLBK ACT 3 & 5 | MINI POE TASK 5 |
| **SPECIFIC OUTCOME 4:** Supervise post stock count procedures | |  |
| AC 1: Post stock count administrative requirements are implemented following organisation`s procedures. | GRP ACT 2 WPLBK ACT 6 | MINI POE TASK 6    KQ 10 |
| AC 2: Evidence of stock counts is verified to have been removed from the stock count area/s as per organisation requirements. | LWBK ACT 4 WPLBK ACT 6 | MINI POE TASK 6 |
| AC 3: An analysis of the stock count preparation and counts process is carried out and an action plan compiled to improve future stock counts. | LWBK ACT 4  LWBK ACT 5  WPLBK ACT 7 | MINI POE TASK 7 |

|  |  |
| --- | --- |
| **DECLARATION AND ACCEPTANCE OF ASSESSMENT PLAN** | |
| This is to declare that I, the learner, understand and agree with the Assessment Notification and Plan as documented and explained above: | |
| **LEARNER NAME AND SURNAME:** |  |
| **LEARNER SIGNATURE:** |  |
| **ASSESSOR NAME AND SURNAME:** |  |
| **ASSESSOR ID/REG NUMBER** |  |
| **MODERATOR NAME AND SURNAME:** |  |
| **MODERATOR ID/REG NUMBER:** |  |

**|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

## AGENDA AND NOTES FOR PRE-ASSESSMENT MEETING

The following items were addressed at a PRE-ASSESSMENT meeting that was held to bring the Assessment process and requirements to my attention.

|  |  |
| --- | --- |
|  The purpose of this assessment. | To test your knowledge on supervising stock counts in the W&R Sector. |
|  Why I am/our company is embarking on the process of fundamental training and assessments. | It forms part of the greater Level 4 qualification that you may want to be placed on and contributes to your skills in the business and workplace |
|  The roles and responsibilities of learners | Learners are to ensure that quality Portfolio tasks (Exercises) are submitted timorously and that constructive facilitator or assessor feedback is considered favorably |
|  The use of unit standards and selecting appropriate unit standards. | The unit standards as indicated fall within the scope of the Learning Programme that you are registered for |
|  Collecting relevant evidence. | Facilitators will assist in guidelines to create and or collect the relevant evidence, learners must comply to these guidelines to ensure successful delivery |
|  The observation process (Practical activity in own store) | The required workplace observation will be observed by the Assessor and/or the Workplace coach |
|  How feedback will be handled. | Feedback will be given to the learner by the Facilitator but the final feedback on determining competency will be distributed via e-mail, fax or given to learners by the Assessor after which a Moderator will moderate the assessments |
|  Agreement of the assessment plan. | The training and assessments has been scheduled to form part of the same process. Please sign the confirmation on the Assessment Plan Page |
|  The APPEALS and disputes procedure. | If a learner is unhappy with any part of the process and feels that he/she has been disadvantaged in achieving competency for this section, an appeal can be submitted to the Training Provider. An Appeals Application can be retrieved from the Training Provider (Facilitator) or Assessor |
|  Who else is involved in the assessment process | Role Players: Facilitator, Peers, Assessor/Moderator and the learner |
|  REVIEW of all the above issues to ensure understanding. | The learner has the opportunity to complete the REVIEW form attached to this Assessment guide for the purpose of making constructive comment on the processes followed in this section. |
| **Learner Acknowledgement: I declare that I understand the Assessment Guidelines and Instruments as discussed with me by the Assessor** | **Signature:** |

**Note to the Learner**:

Although an in-depth Pre-Assessment Meeting will have been held during the Learner Induction Session, the Assessor will re-iterate the above points to you.

Assessors will ask you if you have questions or concerns regarding the assessment. You must sign acknowledgement

## LEARNER DECLARATION OF READINESS FOR ASSESSMENT

***(To be signed on the day of the Summative Assessment/Questionnaire)***

DECLARATION: I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (learner name and surname), declare that I am ready to be assessed on the ***Supervise Stock Count*** unit standard: ***118043,*** as indicated in this assessment guide. I declare that I clearly understand the assessment procedures as explained to me by the assessor and facilitator.

SIGNATURES:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LEARNER SIGNATURE DATE

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ASSESSOR SIGNATURE DATE

**UNIT STANDARDS: Supervise Stock Counts: 118043: NQF Level 4 INSTRUMENT 1: KNOWLEDGE QUESTIONNAIRE**

NAME OF LEARNER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL OF TEST: \_\_\_\_\_/45 = \_\_\_\_\_\_\_\_\_\_\_%**

|  |
| --- |
| **ASSESSMENT INSTRUMENT: KNOWLEDGE TEST FEEDBACK: SUPERVISE STOCK COUNTS ASSESSMENT ATTEMPT 1:**    REQUIREMENTS MET REQUIREMENTS NOT YET MET    COMMENT/ ACTION:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (If Yes):  ***SUGGESTED RE-ASSESSMENT***: NO: YES: Date: \_\_\_\_\_\_\_\_\_\_\_\_    SIGNATURES:    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor Learner    DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    Moderator Comment:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    Moderator Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Moderation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |
| --- |
| **FEEDBACK ASSESSMENT INSTRUMENT: PORTFOLIO FEEDBACK: SUPERVISE STOCK COUNTS ASSESSMENT ATTEMPT 2: (Re-Assessment)**  REQUIREMENTS MET REQUIREMENTS NOT YET MET    COMMENT/ ACTION:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIGNATURES:    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor Learner    DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## INSTRUMENT 1: KNOWLEDGE QUESTIONNAIRE: SUPERVISE STOCK

**COUNTS: LEVEL 4: TOTAL 45**

1. What is a stock count? (2)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Name 5 pieces of stationery and/or equipment that is usually needed for a stock count (5)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Why is it important to time a stock count correctly? (3)

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1. Complete the diagram of the duties for stock count. (10)

DUTIES OF

A STOCK

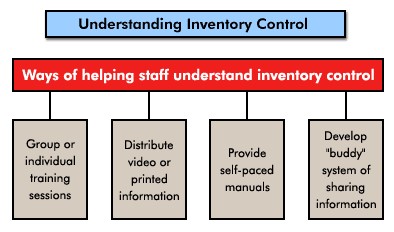
COUNT

1. Why is it important to train staff for stock counts? (3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Name 4 ways of helping staff understand inventory control? (4)



1. Name six tasks of a supervisor during a stock count. (6)

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1. What information about a product is noted on a typical stock take record? (3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Name 4 potential risks or things that can go wrong in a stock count. (4)

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1. List the 3 post stock count administration requirements (3)

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1. List two compliance indicators that staff must adhere to during a stock take (2) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**UNIT STANDARDS: SUPERVISE STOCK COUNTS: 118043: NQF LEVEL 4: INSTRUMENT 2: MINI PORTFOLIO FEEDBACK**

NAME OF LEARNER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- |
| **ASSESSMENT INSTRUMENT: WORKPLACE TASK / OBSERVATION FEEDBACK:**  **ASSESSMENT ATTEMPT 1:**  REQUIREMENTS MET REQUIREMENTS NOT YET MET    COMMENT/ ACTION:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (If Yes):  ***SUGGESTED RE-ASSESSMENT***: NO: YES: Date: \_\_\_\_\_\_\_\_\_\_\_\_    SIGNATURES:    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor Learner    DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    Moderator Comment:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    Moderator Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Moderation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **FEEDBACK ASSESSMENT INSTRUMENT: SUPERVISE STOCK COUNTS: WORKPLACE TASK**    **ASSESSMENT ATTEMPT 2: (Re-Assessment)**    REQUIREMENTS MET REQUIREMENTS NOT YET MET    COMMENT/ ACTION:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIGNATURES:    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor Learner    DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### SUMMATIVE PRACTICAL ASSESSMENT: SUPERVISE STOCK COUNTS

Select a different team to the team that you selected for your Workplace Logbook practice activities to conduct a stock take of a section in your store.

Complete the following tasks and submit the evidence to the Assessor.

### PORTFOLIO TASK 1 (SO1 AC2, 3, 4 & SO2 AC3) INTERNAL COMMUNICATION ON STOCK TAKES

1.1 You are required to prove that your store’s operational system was implemented when you conducted the stock take activities in this Mini Portfolio.

To ensure that your stock take activities are in line with your store’s procedures, retrieve your store’s Policy and Procedure manual for stock taking. Copy the relevant pages and highlight the main procedures for stock taking of the daily or weekly stock take procedure.

Summarise the main points in point format so that you can refer to them during your stock take activities.

1.2 Prepare an Internal Memorandum communicating the schedule for the staff taking part in the stock count.

Should your store not have a template available for this purpose, the one below must be used. If your store makes stock count allocations on an inventory printout, you must insert such a printout but get the stock controller/manager to sign/stamp and date the printout and allocation

You need to allocate at least two people to count the different sections in the chosen department.

### INTERNAL MEMORANDUM STOCK COUNT STAFF SCHEDULE

**TO: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**FROM: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**STOCK COUNT FOR (Department):**

### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **STOCK SECTON IN DEPARTMENT** | **PERSONS RESPONSIBLE** | **PERSONS RESPONSIBLE** |
| 1 |  |  |
| Signatures of responsible persons: |  |  |
| 2 |  |  |
| Signatures of responsible persons: |  |  |
| 3 |  |  |
| Signatures of responsible persons: |  |  |
| 4 |  |  |
| Signature of responsible persons: |  |  |
| 5 |  |  |
| Signature of responsible persons: |  |  |
| **Stock Count Supervisor: (Learner)** | **Name and Surname:** | **Signature:** |
| **Coach/Manager:** | **Name and Surname:** | **Signature:** |
| **Assessor:** | **Name and Surname:** | **Signature:** |

### PORTFOLIO TASK 2 (SO2 AC2, 3)

You need to ensure that the team that is going to conduct the stock count has been trained on the store’s procedures on stock take activities.

2.1 Set up a training session in which you will train or refresh the staff on stock take procedures. Request all the participating team members to sign the following register

**STOCK TAKE TRAINING ATTENDANCE REGISTER**

|  |  |  |
| --- | --- | --- |
| **STOCK TAKE TRAINING ATTENDANCE REGISTER** | | **TRAINING DATE:** |
|  | **Team Member attending Name and Surname** | **Signature** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| **6** | **Learner Signature:** |  |
| **7** | **Coach/Manager’s Signature:** |  |

2.2 **Evidence submission**: Insert a copy of your notes that you circulated or of the stock take training manual that you use in-store. You need only submit a copy of the cover page and the content page of the store’s stock take manual.

**PORTFOLIO TASK 3 (SO2 AC3)**

### ALLOCATING STOCK TAKE DUTIES

3.1 You are now required to **allocate duties to the team members** who will execute the stock take.

You have two options of doing this:

1. Use the format that you use in your store to allocate duties. The format must however indicate the task, the responsible person and signature and the timeframe in which the task must be completed.
2. If your store’s format does not depict the required information, you need to use the following table

|  |  |  |  |
| --- | --- | --- | --- |
| **SPECIFIC TASK** | **TIMELINE**  **(For e.g. I day or 3 hrs)** | **RESPONSIBLE TEAM MEMBER**  **(Name and Surname)** | **RESPONSIBLE**  **TEAM MEMBER**  **SIGNATURE** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Learner Signature:** |  | **Date:** |  |
| **Coach /Manager’s Signature:** |  | **Date:** |  |
| **Assessor Signature:** |  | **Date:** |  |

**PORTFOLIO TASK 4 (SO3 AC1 & 2)**

### MONITORING THE STOCK COUNT

During the stock take that you have now planned, you need to monitor the team members to ensure compliance to the required stock count procedures

In Activity 2 in your Learner Workbook, you designed a Compliance Checklist.

You are required to implement this compliance checklist with the team that is counting stock for this Workplace Activity.

**Evidence requirement:**

Insert your COMPLETED CHECKLIST hereafter.

Ensure that all the participating team members have signed the checklist

### PORTFOLIO TASK 5 (SO3 AC3)

#### STOCK COUNT QUERIES OR EXECPTION/DISCREPENCIES

The Stock Count Team may have found a discrepancy or query whilst taking stock.

Refer to Group Discussion 1 in your Learner Workbook and take the necessary steps to resolve the query or discrepancy.

You can:

1. Use your store’s format to list/highlight the query/discrepancy
2. Use the following table

**Evidence requirement:**

Insert any form of evidence form the stock count activity that will show the query or discrepancy Evidence must be stamped, dated and signed by the workplace Coach

|  |  |
| --- | --- |
| **STOCK TAKE QUERY OR DISCREPANCY** | **ACTION TO BE TAKEN** |
|  |  |
|  |  |
| **Learner Signature:** |  |
| **Coach/Manager Signature:** |  |

### PORTFOLIO TASK 6 (SO4 AC1 & 2)

#### STOCK COUNT POST ADMINISTRATIVE REQUIREMENTS

You are required to implement your Post Stock Count Compliance Checklist that you compiled in Learner Workbook Activity 3

It was in the following format:

|  |  |  |  |
| --- | --- | --- | --- |
| **Post stock count procedures** | **Completed** | **Not completed** | **Action Plan** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Coach/ Manager’s Name and Surname: |  | Date: | Signature: |
| Learner Signature: |  |  |  |

**Evidence Requirement:**

Insert the completed and signed checklist hereafter.

### PORTFOLIO TASK 7 (SO4 AC3)

#### ANALYSING THE STOCK COUNT

**1.** Analyze the stock count at your store, and identify the **shortcomings** and **success points** for:

a. the preparation of the count:

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b. The count process:

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2. Complete the table below in order to advise what actions can be put in place at the next stock take in order to overcome the shortcomings.

|  |  |
| --- | --- |
| Shortcoming at stock count | Action Plan to rectify |
|  |  |
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1. **|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **PORTFOLIO TASK NUMBER** | **EVIDENCE TO BE INSERTED** | **Evidence inserted and Outcome** | | **ASSESSOR**  **COMMENT IF RNYM** | **LEARNER**  **SIGNATURE** | **ASSESSOR**  **SIGNATURE** |
| **EXAMPLE:** |  | **RM** | **RNYM** |  | **Joe Soap** | **Ann Jones** |
| **PORTFOLIO TASK 1:** Internal Stock Take Communication and The stock to be counted is identified | Store procedure manual – relevant pages and points highlighted  Printout of stock list to be counted for e.g. small appliances printout….. Internal Memorandum or other form of communication |  |  |  |  |  |
| **PORTFOLIO TASK 2:** Training Session | Training Attendance Register – signed  Stock count training manual – front page and content page to be copied Any other relevant |  |  |  |  |  |
| **PORTFOLIO TASK 3:** The Schedule for the stock count has been communicated to staff involved in the count All duties for the stock count have been allocated to staff. | Schedule with names and task allocations that was signed by the staff |  |  |  |  |  |
| **PORTFOLIO TASK 4:** The staff are monitored during the stock count The accuracy of the count is checked | Completed Monitoring checklist |  |  |  |  |  |
| **PORTFOLIO TASK 5:** Stock count queries are actioned/authorized | Any relevant – discrepancies can be highlighted and queries lodged against these variances be shown according to store procedure |  |  |  |  |  |
| **PORTFOLIO TASK 6:** Post Stock Count Administration such as all evidence of the stock count has been removed | Housekeeping process. Photograph etc. As per store processes |  |  |  |  |  |
| **PORTFOLIO TASK 7:** An analysis of the stock count took place and action plans recorded | Variances are recorded in writing or on a system, book etc. Actions plans for corrections are recorded in writing Completed table |  |  |  |  |  |

1. **|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **ASSESSMENT DECISION/JUDGEMENT *ATTEMPT 1* Supervise Stock Counts Performance: 118043** | | | |
| **Item** | **Specific**  **Outcomes** | **REQUIREMENTS**  **MET (****)** | **REQUIREMENTS**  **NOT YET MET (X)** | **Comment /Action** |
| 1. | SO 1 |  |  |  |
| 2. | SO 2 |  |  |  |
| 3. | SO 3 |  |  |  |
| 4. | SO 4 |  |  |  |

The Evidence that the learner has provided is:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **YES** | **NO** | **Comment/ Action where required** |
| Valid |  |  |  |
| Relevant |  |  |  |
| Current |  |  |  |
| Sufficient |  |  |  |
| Authentic |  |  |  |

**Competent Not yet Competent:**

|  |
| --- |
| **DECLARATION BY LEARNER** |
| I declare that I am satisfied that the feedback given to me by the Assessor was relevant, sufficient and done in a constructive manner. I accept the assessment decision. |

**Signatures:**

|  |  |  |
| --- | --- | --- |
| **Learner:** |  | **Date:** |
| **Assessor:** |  | **Assessor Reg. No.** |
| **Moderator:** |  | **Moderator Reg. No.** |
| **Moderator Comment:** |  | |

1. **|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **ASSESSMENT DECISION/JUDGEMENT *ATTEMPT 2* Supervise Stock Counts Performance: 118043** | | | |
| **Item** | **Specific**  **Outcomes** | **REQUIREMENTS**  **MET (****)** | **REQUIREMENTS**  **NOT YET MET (X)** | **Comment /Action** |
| 1. | SO 1 |  |  |  |
| 2. | SO 2 |  |  |  |
| 3. | SO 3 |  |  |  |
| 4. | SO 4 |  |  |  |

The Evidence that the learner has provided is:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **YES** | **NO** | **Comment/ Action where required** |
| Valid |  |  |  |
| Relevant |  |  |  |
| Current |  |  |  |
| Sufficient |  |  |  |
| Authentic |  |  |  |

**Competent Not yet Competent:**

|  |
| --- |
| **DECLARATION BY LEARNER** |
| I declare that I am satisfied that the feedback given to me by the Assessor was relevant, sufficient and done in a constructive manner. I accept the assessment decision. |

**Signatures:**

|  |  |  |
| --- | --- | --- |
| **Learner:** |  | **Date:** |
| **Assessor:** |  | **Assessor Reg. No.** |
| **Moderator:** |  | **Moderator Reg. No.** |
| **Moderator Comment:** |  | |

1. **|** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

**UNIT STANDARD: SUPERVISE STOCK COUNTS: 118043: NQF LEVEL 4 LEARNER ASSESSMENT REVIEW**

NAME OF LEARNER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME OF ASSESSOR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***NOTE: Should you select NO, please comment and/or make a suitable suggestion***

|  |  |  |  |
| --- | --- | --- | --- |
|  | LEARNER | ASSESSOR |  |
| Questions | Yes/No | Yes/No | Comments/ Recommendations |
| 1. Was the assessment process explained? |  |  |  |
| 2. Were special needs considered during the assessment process? |  |  |  |
| 3. Were all the assessment guides and documents prepared for the assessment? |  |  |  |
| 4. Was the assessment valid? |  |  |  |
| 5. Was the assessment conducted in a fair manner? |  |  |  |
| 6. Was the assessment process transparent and open? |  |  |  |
| 7. Was the assessment activities understood clearly? |  |  |  |
| 8. Was the assessment process well Managed? |  |  |  |
| 9. Was the assessment process approached positively? |  |  |  |
| 10. Was feedback sufficient and relevant and given in a professional manner? |  |  |  |
| 11. Was the feedback constructive?  (Did it help to fix problems and close gaps if there were any) |  |  |  |
| 12. Was sufficient guidance relating to the collection of workplace evidence provided from the various role players? |  |  |  |
| 13. Did you experience any weakness in the way that the assessment process unfolded? |  |  |  |
| 14. According to you, do you think that you have learnt from the assessments that were conducted? |  |  |  |

Signed: Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Learner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature of Assessor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Moderator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COMMENT OF MODERATOR:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**30 |** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3

## *PARTICIPANTS*



**31 |** L e a r n e r A s s e s s m e n t G u i d e : 1 1 8 0 4 3