 

**RETAIL CHAIN STORE MANAGER**

**Aligned with Qualification 103150 Retail Chain Store Manager**

**PORTFOLIO OF EVIDENCE**



**Retail chain store manager**

**Portfolio of evidence**

|  |  |
| --- | --- |
| **Company** |  |
| **Learner name & surname** |  |
| **Learner ID number** |  |
| **Learner signature** |  |
| **Line manager name & surname** |  |

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| 1 Learner information |

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| **Learner information sheet** | | | | | | | | | | | | |
| **Occupational qualification** | OC: Retail chain store manager | | | | | | | | | | | |
| **Learner’s first and middle names** |  | | | | | | | | | | | |
| **Learner’s surname** |  | | | | | | | | | | | |
| **Nationality code – *please select from the list of codes*** |  | **Citizen resident status code** | |  | | **Socio-economic status code** | | | |  | | |
| **Learner’s South African ID number** |  | | | | | | | | | | | |
| **Alternative ID type – *please select code for ID type*** |  | **Alternative ID number** | |  | | | | | | | | |
| **Home language code** |  | | | | | | | | | | | |
| **Home language code** |  | **Are you fluent in English?** | | |  | | **If ‘No’ would you need an interpreter?** | | | |  | |
| **Disability code** |  | **Do you have specific needs in terms of disability? (Please specify)** | | | | |  | | | | | |
| **Highest qualification** |  | | | | | | | | | | | |
| **Physical address** |  | | | | | | | | | | | |
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|  | | | | | | | **Province code** | | |  | |
| **Postal address** |  | | | | | | | | | | | |
|  | | | | | | | | | | | |
|  | | | | | | | | **Postal Code:** | | |  |
| **Telephone number** |  | | **Cell Number** | | | |  | | | | | |
| **Email address** |  | | | | | | | | | | | |
| **Employer company** |  | | | | | | | | | | | |
| **Employer contact number** |  | | | | | | | | | | | |
| **Date on which Portfolio is submitted** |  | | | | | | | | | | | |
| **Name of Assessor** |  | | | | | | | | | | | |
| **Assessor ID or Registration number** |  | | | | | | | | | | | |

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| **Alternative ID type** | **Equity Code** | **Nationality Code** | **Citizen Resident Status** |
| 521 SAQA Member ID  527 Passport No.  529 Driver’s License  531 Temporary ID No.  533 None  535 Unknown  537 Student No.  538 Work Permit No.  539 Employee No.  540 Birth Certificate No.  541 HSRC Register No.  561 ETQA Record No. | BA Black: African  BC Black: Coloured  BI Black: Indian/Asian  U Unknown  WH White | U Unspecified  SA South Africa  SDC SADC except SA (i.e. Nam to ZAI)  NAM Namibia  BOT Botswana  ZIM Zimbabwe  ANG Angola  MOZ Mozambique  LES Lesotho  SWA Swaziland  MAL Malawi  ZAM Zambia  MAU Mauritius  TAN Tanzania  SEY Seychelles  ZAI Zaire  ROA Rest of Africa  EUR European countries  AIS Asian countries  NOR North American countries  SOU Central & South America countries  AUS Australia & New Zealand  OOC Other and rest of Oceania  NOT N/A: Institution | U Unknown  SA South Africa  O Other  D Dual (SA plus other) |
| **Home Language Code** | **Province Code** | **Disability Status** | **Socio-economic Status** |
| ENG English  AFR Afrikaans  OTH Other  SEP sePedi  SES seSotho  SET seTswana  SWA siSwati  TSH tshiVenda  U Unknown  XHO isiXhosa  XIT xiTsonga  ZUL isiZulu  NDE I siNdebele | 0 Undefined  1 Western Cape  2 Eastern Cape  3 Northern Cape  4 Free State  5 Kwazulu/Natal  6 North West  7 Gauteng  8 Mpumalanga  9 Limpopo | N None  01 Sight (even with glasses)  02 Hearing (even with a hearing aid)  03 Communication (talking, listening)  04 Physical (moving, standing, grasping)  05 Intellectual (difficulties in learning); retardation  06 Emotional (behavioural or psychological  07 Multiple  09 Disabled but unspecified  U Unknown | U Unspecified  01 Employed  02 Unemployed, looking for work  03 Not working – not looking for work  04 Not working – housewife / home-maker  06 Not working – scholar / full time student  07 Not working – pensioner / retired person  08 Not working – disabled person  09 Not working – not wishing to work  10 Not working – none of the above  97 N/A: Aged <15  98 N/A: Institution |

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| 2 Purpose of this portfolio guide |

This Portfolio Guide is designed to list and contain all the documents that should be submitted to the Assessment Centre when the learner is enrolled for the final integrated summative assessment.

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| 3 Learner rights relating to assessment |

Learners have the following rights relating to assessment:

* To be informed about the requirements for assessment, for ex ample, when and how assessment will take place; assessment activities they will be required to perform; type an amount of evidence required
* Timing of assessment to be suitable, i.e. when the learner is ready for assessment
* Fair assessment
* Feedback on assessment, including an indication of what further evidence is required if that is the case
* Re-assessment – the Training provider will provide information on re-assessment opportunities
* Guidance on further learning opportunities in the event that the learner is repeatedly found Not Yet Competent
* To be assessed in language of preference, as far as practicable, or to have an interpreter available
* To have special needs accommodated, for example, hearing, speaking or physical impairment, where possible
* The assessment to be free from barriers to a fair assessment, for example, access to venue for assessment, cost of assessment, working shifts
* Appeal against an assessment in the event of:
  + An unfair assessment
  + An invalid assessment, i.e. the assessment did not assess what was supposed to be assessed
  + Disagreement with the assessor’s judgement
  + Unethical behaviour of the assessor

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| 4 Integrated assessment |

4.1 Integrated formative assessment

The skills development provider will use the curriculum to guide them on the stipulated internal assessment criteria and weighting. They will also apply the scope of practical skills and applied knowledge as stipulated by the internal assessment criteria. This formative assessment leads to entrance into the integrated external summative assessment.

4.2 Integrated summative assessment

An external integrated summative assessment conducted through the relevant Quality Council for Trades and Occupation (QCTO) Assessment Quality Partner is required for the issuing of this qualification. The external integrated summative assessment will focus on the Exit Level Outcomes and Associated Assessment Criteria. The external assessment will consist of both a set of written responses (paper or on-line) which will test the learner's ability to communicate, solve problems and make decisions in relation to a set of typical situations and circumstances which are encountered when buying merchandise and allocating merchandise to stores, and the demonstrated use of computers where the candidate will demonstrate sourcing suppliers and products and allocating stock to stores. The combination of the written and practical assessment will be conducted over a period of one day at a QCTO accredited assessment centre.

## 4.3 Exit level outcomes and assessment criteria

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| **Exit level outcome** | **Assessment criteria** |
| 1. Maintain or improve customer service standards in a retail chain store. | * The customer service standards provided are evaluated and shortfalls in service delivery are identified according to scenario given. * Actions proposed to improve service delivery are practical and are within the organisations policies and procedures for maintaining and building customer relations. * Service standards meeting or exceeding customer service expectations are identified and proposed action to acknowledge staff performance is practical and within organisational policies and procedures and would encourage the staff members concerned. |
| 1. Manage stock levels. | * Reports on stock performance are evaluated and problem areas identified. * The quantities of stock ordered meet the expected sales of the store and take into account stock on hand and outstanding orders. * Stock shortages are identified and actions to obtain stock are practical and within the organisations policies and procedures. * Excess and obsolete stocks are identified and actions to reduce these stock levels are practical and within the organisations policies and procedures. |
| 1. Manage retail chain store operations. | * Daily and weekly operational objectives are allocated according to their importance, frequency and the time it is expected for them to be completed. * The scheduling of staff takes into account experience of the staff, legal working hours and the time expected for the tasks to be completed and will result in all tasks being completed on time. * Operational plans are updated according to unexpected additional tasks required and staff absenteeism and still ensure all tasks are completed on time. * Unacceptable staff performance is identified and tasks rescheduled to ensure they are completed on time and within timeframes. |
| 1. Minimise shrinkage and loses in a retail chain store. | * Checklists developed will highlight all potential areas of loss in the store. * The use of the checklist highlights all areas of potential loss in the given scenario. * Action plans developed to minimise shrinkage and losses are practical, legal and within organisational policies and procedures and would have the desired effect of minimising the chances of losses occurring. |

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| 5 How to prepare your portfolio |

5.1 This Portfolio Guide serves as a template.

5.2 It is recommended that you use a two-ring file for submitting your Portfolio. The reason is that it might be necessary for the Assessor to request more evidence, in which case the additional evidence can easily be inserted into the correct position in the Portfolio, making moderation easier. (If the Portfolio is bound with a ring it is not possible to keep all your evidence together and some might be lost in which case your competence might not be confirmed by a moderator).

5.3 Include the information required and indicated in the positions indicated in this Portfolio Guide:

5.4 Complete the learner biographical information in the Candidate Information Sheet. Make sure it is completed fully.

5.5 Include a curriculum vitae

5.6 Include a ***certified copy*** of your identity document (ID).

5.7 Include ***certified copies of your highest school certificate and any other qualifications*** you may have.

5.8 Make sure that you sign the form ***Declaration of learner preparation.*** This is a declaration that you have agreed that you are ready for assessment.

5.9 Make sure to complete and sign the ***Declaration of authenticity.*** This provides your statement that all the work in this Portfolio is ***your own work***.

5.10 Insert your completed workbook where indicated in this portfolio. Make sure that you have completed all activities.

5.11 Insert your assessed knowledge test where indicated in this portfolio.

5.12 Insert your completed practical learning guide where indicated in this portfolio. Make sure it is signed off by the facilitator or your line manager in every space where his/her signature is required.

5.13 Insert your workplace experience record where indicated in this portfolio. Make sure it is signed off by your line manager in every space where his/her signature is required.

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| 6 Curriculum |

Qualification curricula falling under the QCTO consist of three modules:

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| Knowledge module | Practical skill modules | Work experience modules |

The full NQF level 5 programme is worth 106 credits, structured as follows.

**Knowledge Modules:**

* 142103001-KM-01 Concept and principles of retail operations management, Level 5, 4 Credits.
* 142103001-KM-02 Concept and principles of communication in retail, Level 4, 4 Credits.
* 142103001-KM-03 Concepts and principles of leading teams in a retail chain store environment, Level 5, 7 Credits.
* 142103001-KM-04 Concept and principles of managing service standards of a retail chain store, Level 5, 2 Credits.
* 142103001-KM-05 Concepts and principles of stock control in a retail chain store, Level, 3 Credits.
* 142103001-KM-06 Concept and principles of implementing promotional activities in a retail chain store, Level 5, 3 Credits.
* 142103001-KM-07 Concept and principles of improving the financial performance of a retail chain store, Level 5, 3 Credits.

*Total number of Credits for Knowledge Modules: 26.*

**Practical Skill Modules:**

* 142103001-PM-01 Manage retail chain store employee performance, Level 5, 3 Credits.
* 142103001-PM-02 Manage retail chain store operational processes, Level 5, 2 Credits.
* 142103001-PM-03 Manage retail chain store service standards, Level 5, 2 Credits.
* 142103001-PM-04 Maintain effective retail chain store stakeholder relations, Level 5, 2 Credits.
* 142103001-PM-05 Manage stock control in a retail chain store, Level 5, 3 Credits.
* 142103001-PM-06 Propose improvements to a retail chain store's range and layout, Level 5, 2 Credits.
* 142103001-PM-07 Implement plans to improve sales in a retail chain store, Level, 2 Credits.
* 142103001-PM-08 Implement plans to improve a retail chain store's financial performance Level 5, 2 Credits.
* 142103001-PM-09 Manage risk and maintain assets in a retail chain store, Level 5, 3 Credits.

*Total number of Credits for Practical Skill Modules: 21.*

**Work Experience Modules:**

* 142103001-WM-01 Processes and procedures for planning and implementing retail chain store operations Level 5, 9 Credits.
* 142103001-WM-02 Processes and procedures for leading teams in a retail chain store environment Level 4, 8 Credits.
* 142103001-WM-03 Processes and procedures for managing retail chain store service standards Level 5, 8 Credits.
* 142103001-WM-04 Processes and procedures for maintaining effective retail chain store stakeholder relations Level 5, 4 Credits.
* 142103001-WM-05 Processes and procedures for managing stock levels and influencing store range and layout, Level 5, 8 Credits.
* 142103001-WM-06 Processes and procedures for improving the retail chain store's bottom line, Level 5, 8 Credits.
* 142103001-WM-07 Processes and procedures for managing sales and promotional activities, Level 5, 6 Credits.
* 142103001-WM-08 Processes and procedures for managing risk and maintaining assets in a retail chain store, Level 5, 8 Credits.

Total number of Credits for Work Experience Modules: 59.

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| 7 Learner identity document |

Insert a **certified copy** of your identity document.

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| 8 Workbook |

Insert your completed workbook in your portfolio. Make sure all activities are completed.

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| 9 Knowledge assessments |

Insert your assessed knowledge tests in your portfolio.

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| 10 Practical training |

Insert your complete practical training record. Make sure it is signed off by the facilitator or your line manager.

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| 11 Workplace experience |

Insert your completed workplace experience record. Make sure it is signed off by your line manager.

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| 12 Assessment feedback on integrated summative assessment |

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| Learner full names and surname |  |
| Learner ID number |  |
| Programme completed |  |
| Assessor full names and surname |  |
| Assessor ID number |  |

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| **Knowledge subjects** | | | |
| **Number** | **Title** | **C/NYC** | **Feedback to learner** |
| 142103001-KM-01 | Concept and principles of retail operations management |  |  |
| 142103001-KM-02 | Concept and principles of communication in retail |  |  |
| 142103001-KM-03 | Concepts and principles of leading teams in a retail chain store environment |  |  |
| 142103001-KM-04 | Concept and principles of managing service standards of a retail chain store |  |  |
| 142103001-KM-05 | Concepts and principles of stock control in a retail chain store |  |  |
| 142103001-KM-06 | Concept and principles of implementing promotional activities in a retail chain store |  |  |
| 142103001-KM-07 | Concept and principles of improving the financial performance of a retail chain store |  |  |

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| **Practical skill modules** | | | |
| **Number** | **Title** | **C/NYC** | **Feedback to learner** |
| 142103001-PM-01 | Manage retail chain store employee performance |  |  |
| 142103001-PM-02 | Manage retail chain store operational processes |  |  |
| 142103001-PM-03 | Manage retail chain store service standards, |  |  |
| 142103001-PM-04 | Maintain effective retail chain store stakeholder relations |  |  |
| 142103001-PM-05 | Manage stock control in a retail chain store |  |  |
| 142103001-PM-06 | Propose improvements to a retail chain store's range and layout |  |  |
| 142103001-PM-07 | Implement plans to improve sales in a retail chain store |  |  |
| 142103001-PM-08 | Implement plans to improve a retail chain store's financial performance |  |  |
| 142103001-PM-09 | Manage risk and maintain assets in a retail chain store |  |  |

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| **Work experience modules** | | | |
| **Number** | **Title** | **C/NYC** | **Feedback to learner** |
| 142103001-WM-01 | Processes and procedures for planning and implementing retail chain store operations |  |  |
| 142103001-WM-02 | Processes and procedures for leading teams in a retail chain store environment |  |  |
| 142103001-WM-03 | Processes and procedures for managing retail chain store service standards |  |  |
| 142103001-WM-04 | Processes and procedures for maintaining effective retail chain store stakeholder relations |  |  |
| 142103001-WM-05 | Processes and procedures for managing stock levels and influencing store range and layout |  |  |
| 142103001-WM-06 | Processes and procedures for improving the retail chain store's bottom line |  |  |
| 142103001-WM-07 | Processes and procedures for managing sales and promotional activities |  |  |
| 142103001-WM-08 | Processes and procedures for managing risk and maintaining assets in a retail chain store |  |  |

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| **Exit level outcomes** | | | |
| ELO1 Maintain or improve customer service standards in a retail chain | The customer service standards provided are evaluated and shortfalls in service delivery are identified according to scenario given. |  |  |
| Actions proposed to improve service delivery are practical and are within the organisations policies and procedures for maintaining and building customer relations. |  |  |
| Service standards meeting or exceeding customer service expectations are identified and proposed action to acknowledge staff performance is practical and within organisational policies and procedures and would encourage the staff members concerned |  |  |
| ELO 2 Manage stock levels. | Reports on stock performance are evaluated and problem areas identified |  |  |
| The quantities of stock ordered meet the expected sales of the store and take into account stock on hand and outstanding orders |  |  |
| Stock shortages are identified and actions to obtain stock are practical and within the organisations policies and procedures |  |  |
| Excess and obsolete stocks are identified and actions to reduce these stock levels are practical and within the organisations policies and procedures |  |  |
| ELO 3 Manage retail chain store operations | Daily and weekly operational objectives are allocated according to their importance, frequency and the time it is expected for them to be completed |  |  |
| The scheduling of staff takes into account experience of the staff, legal working hours and the time expected for the tasks to be completed and will result in all tasks being completed on time. |  |  |
| Operational plans are updated according to unexpected additional tasks required and staff absenteeism and still ensure all tasks are completed on time. |  |  |
| Unacceptable staff performance is identified and tasks rescheduled to ensure they are completed on time and within timeframes |  |  |
| ELO 4 Minimise shrinkage and loses in a retail chain store | Checklists developed will highlight all potential areas of loss in the store |  |  |
| The use of the checklist highlights all areas of potential loss in the given scenario |  |  |
| Action plans developed to minimise shrinkage and losses are practical, legal and within organisational policies and procedures and would have the desired effect of minimising the chances of losses occurring |  |  |
| ELO 5 Plan to improve the bottom line contribution of a retail chain store | The store reports are analysed and key areas requiring action are identified and prioritised |  |  |
| The proposed action plan to improve the Gross Profit of the store is practical for a chain store environment and would have the desired effect of improving the Gross Profit |  |  |
| The proposed action plans to reduce identified expenses requiring action are practical for a chain store environment and would have the desired effect of reducing costs |  |  |

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| Assessor’s overall finding (C/NYC) |  | | |
| Assessor comments | | | |
| Assessor’s signature |  | Date |  |
| Moderator full names and surname |  | | |
| Moderator ID number |  | | |
| Moderator comments | | | |
| Moderator’s signature |  | Date |  |
| Learner’s signature |  | Date |  |