





Quality Council for Trades & Occupations

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QCTO OCCUPATIONAL PART- QUALIFICATION DOCUMENT

IN LINE WITH QQSF POLICY (2021) OCCUPATIONAL QUALIFICATION TYPE
(NOMENCLATURE)

PART- QUALIFICATION	TYPE (NOMENCLATURE)	TITLE (DESCRIPTOR)	NQF LEVEL	CREDITS
332301	Higher Occupational Certificate	Planner	5	53
CURRICULUM CODE	332301-000-01-02			
PARTNER DETAILS	ORGANISATION NAME	WEBSITE ADDRESS	TELEPHONE NUMBER	LOGO
QUALITY PARTNER - DEVELOPMENT	Wholesale and Retail SETA	www.wrseta.org.za	(012) 622-9500	
QUALITY PARTNER – ASSESSMENT (NOT APPLICABLE TO SKILLS PROGRAMME)	Wholesale and Retail SETA	www.wrseta.org.za	(012) 622-9500	
NB: - QUAL ID AND LIFE SPAN FOR QUALIFICATION(S)/PART-QUALIFICATION(S) TO BE COMPLETED BY SAQA - SKILLS PROGRAMME ID AND LIFE SPAN TO BE COMPLETED BY QCTO				

DESIGNATION	NAME AND SURNAME	SIGNATURE	DATE
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1. PART-QUALIFICATION DETAILS

Add additional space/table lines as is required

1.1 Sub-Framework:

Occupational Qualifications Sub-Framework

1.2 Type (Nomenclature):

1.2.1 Specify if this is a Qualification/Part-Qualification/Skills Programme

NB: Credit value of more than 120 and above is a Qualification.

Credit value of less than 120 credits is a Part-Qualification

Skills Programme 8 – 60 credits

Part-Qualification

1.2.2 Type: (Nomenclature) e.g. Advanced Occupational Certificate)

NB: For Part-Qualification use Occupational Certificate as Qualification Nomenclature

Skills Programmes use Skills Programme, as nomenclature.

Higher Occupational Certificate

1.3 Title Descriptor:

State the Occupation, Specialisation, context or Skills Programme context

Planner

1.4 NQF Level:

5

1.5 Credits:

53

1.6. Organising Field and Sub-field:

NB: Not Applicable to Skills Programmes

1.6.1 Organising Field:

Services

1.6.2 Organising Sub-Field:

Wholesale and Retail

1.7 QCTO Curriculum Code:

332301-000-01-02

1.8 Originator/Quality Partner (QP) – Development/Assessment

1.8.1 Quality Partner (Qualifications Development):

Wholesale and Retail SETA

1.8.2 Quality Partner (Assessment):

NB: Not Applicable to Skills Programmes

Wholesale and Retail SETA

1.9 Replacement

For the Replacement of Registered Occupational/Historical Qualifications/Unit Standards (US) and/or Learning Programmes (LP)/ QCTO/SETA Approved Skills Programmes, list details below:

This qualification replaces:

SAQA QUAL/US/LP ID OR QCTO/SETA APPROVAL ID	QUALIFICATION TITLE	Pre-2009 NQF Level	CURRICULUM CODE (if Occupational)	NQF LEVEL	MIN. CREDITS
None					

If there are no qualifications or learning programmes that must be replaced, then state that this qualification does not replace any other qualification, and no other qualification replaces it.

2. RATIONALE

2.1 The need for the Part-Qualifications

Feedback from the Wholesale and Retail sector have identified the positions of Buyer and Planner to be a scarce skill. These part-qualifications feed into the Higher Occupational Certificate: Retail Buyer which is also identified as a national scarce skill. The industry cannot find qualified people to fill these roles and the need for a qualification is paramount.

In some sectors of the industry (smaller organisations) one person performs both roles while in larger organisations these roles are specialised and performed by two different people working in teams.

It is these people who decide on the merchandise to buy, the quantity to buy and to which stores to allocate the different stock.

If this is not done according to the target market of the organisation the organisation could soon find itself without customers and out of business.

These people have a huge impact on the organisation's ability to manage its cash flow through the successful buying and allocation of stock to outlets of the organisation

2.2 Similar Qualification(s), Part-Qualifications/Skills Programmes

List similar Qualification(s), Part-Qualifications/Skills Programmes, already NQF registered/ QCTO approved:

332301-000-01-00: Higher Occupational Certificate: Retail Buyer, NQF Level 5, Credits: 131

332301-000-01-01: Higher Occupational Certificate: Buyer, NQF Level 5, Credits: 110

2.3 Benefit to the sector, society and the economy:

The Higher Occupational Certificate: Retail Buyer provides significant benefits to the retail sector in South Africa by ensuring a steady pipeline of skilled professionals who can drive operational efficiency and strategic decision-making. With specialised knowledge in sourcing, inventory management, and market trends, certified retail buyers help optimise product assortments, reduce costs, and enhance customer satisfaction. This qualification also promotes innovation and competitiveness within the sector, enabling businesses to adapt to

changing consumer demands and market conditions, ultimately contributing to the sector's growth and sustainability.

The occupational qualification offers significant benefits to South African society by equipping individuals with specialised skills needed in the retail sector. This qualification fosters economic growth by improving the efficiency and effectiveness of the retail industry, enhancing product sourcing, inventory management, and customer satisfaction. It also promotes job creation and empowerment by developing a skilled workforce, which can help reduce unemployment. Furthermore, by aligning education with industry needs, the certification supports the competitiveness of South Africa's retail market both locally and internationally, contributing to the overall economic development of the country.

Benefits to the South Africa's economy include developing a skilled workforce that enhances efficiency in the retail sector. This occupational qualification improves business productivity, supports job creation, and boosts competitiveness, while promoting sustainable sourcing and supply chain practices. Ultimately, it strengthens the retail industry, contributing to economic growth and development.

2.4 Typical learners:

Typical learners would include unemployed persons with grade 12 attending technical universities, employed learners moving from a supervisor or management position into buying/planning. Learners may also be individuals seeking to transition into the retail sector from other industries, eager to acquire the skills necessary to thrive in a dynamic and competitive field.

Qualified learners will work in the buying or planning department of a wholesale or retail business.

2.5 Relation to Occupation(s) and/or Profession(s)

2.5.1 Occupation(s) related:

2.5.1.1 Collaboration with relevant stakeholders:

Merchandise Planner, Supply Chain Manager, Vendor/Supplier, Store Manager, Marketing Manager, Product Designer/Developer, Financial Analyst, Category Manager, Quality Assurance Officer, Logistics.

2.5.1.2 List typical occupations in which the qualifying learner will operate (if relevant)

Retail Planner, Demand Planner, Sourcing Coordinator, Retail Buyer, Merchandise Planner, Inventory Planner/Inventory Analyst, Supply Chain Planner, Space Planner/Floor Planner, Allocation Analyst/Stock Allocator, Category Planner, Sales and Operations Planner (S&OP) – Entry Level.

2.5.2 Profession(s) related:

2.5.2.1 Collaboration with relevant stakeholders:

Merchandise Planner, Supplier/Vendor, Category Manager, Supply Chain Manager, Marketing Manager, Sales Manager, Financial Analyst, Store Manager, Product Developer/Designer, Quality Assurance Specialist, Logistics Coordinator.

2.5.2.2 List typical professions in which the qualifying learner will operate (if relevant)

Retail Planner, Demand Planner, Sourcing Coordinator, Retail Buyer, Merchandise Planner, Inventory Planner, Supply Chain Planner, Space Planner/Floor Planning Specialist, Allocation/Replenishment Planner, Category Planner, Sales and Operations Planner (S&OP) Coordinator, E-commerce Planner.

3. PURPOSE

3.1 Benefit the learners:

The purpose of this qualification is to qualify the learner as a Planner.

The Planner manages supplier relationships and the performance of stock in the retail environment.

3.2 What the part-qualification intends to achieve:

i.e. what the qualifying learner will know, do and understand after achievement;

It intends to equip learners with the specialised knowledge and practical skills required to effectively manage the purchasing process within the retail sector. The qualification aims to develop competencies in areas such as product selection, inventory management, supplier negotiations, and market trend analysis. By achieving this, the certificate prepares learners to make informed, strategic buying decisions that optimise product assortments, control costs, and maximise profitability for retail businesses. Additionally, it aims to enhance the overall competitiveness of the retail industry by ensuring that professionals are well-versed in the latest industry practices, thereby contributing to the growth and sustainability of the sector. The certification ultimately seeks to address the skills gap in the retail sector, enabling learners to advance in their careers while supporting the evolving needs of the retail market.

3.3 Typical Graduate attributes

These include strong product knowledge, effective negotiation and communication skills, and the ability to manage inventory and analyse market trends. Graduates demonstrate proficiency in cost management, strategic decision-making, and supply chain processes. They are detail-oriented, adaptable to changing market conditions, and capable of making data-driven purchasing decisions. These attributes equip them to optimise product assortments, drive business profitability, and contribute to the overall success of retail operations.

4. ENTRY REQUIREMENTS

National Senior Certificate (NSC) or National Vocational Certificate (NCV) at NQF level 4

5. RECOGNITION OF PRIOR LEARNING (RPL)

5.1 RPL for Access to Training:

NB: QCTO Standard Statement

Learners may use the RPL process to gain access to training opportunities for a programme of learning, qualification, part-qualification or skills programme if they do not meet the formal, minimum entry requirements for admission.

5.2 RPL for Access to the External Integrated Summative Assessment (EISA):

NB: QCTO Standard Statement

RPL assessment provides an alternative access route into a programme of learning, qualification, part-qualification, or skills programme.

Such an RPL assessment may be developed, moderated and conducted by the accredited Skills Development Provider which offers that specific qualification/part qualification/skills programme. Such an assessment must ensure that the learner is able to display the equivalent level of competencies required for access, based on the NQF level descriptors.

6. RULES OF COMBINATION

6.1 Components:

KNOWLEDGE/THEORY COMPONENT

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
332301-000-01-KM-01	Managing supplier relationships and the performance of merchandise	5	10	Blended
332301-000-01-KM-04	Allocating stock to stores	5	3	Blended

Total Credits = 13

APPLICATION COMPONENT

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

- For Qualifications, the Application Component includes compulsory Practical Skills Modules and Work Experience/Work Based Learning Modules.
- For Part-Qualifications, the Applications Component includes Practical Skills Modules and/or Work Experience/Work Based Learning Modules.
- For Skills Programmes, the Application Component includes Practical Skills Modules.

PRACTICAL SKILLS MODULE(S)

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
332301-000-01-PM-01	Manage supplier and stock performance	5	10	Blended
332301-000-01-PM-02	Manage stock through the supply chain	5	4	Blended
332301-000-01-PM-06	Plan and allocate stock to stores	5	6	Blended

Total Credits = 20

WORK EXPERIENCE MODULES

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
332301-000-01-WM-01	Processes and procedures for the management of supplier - and stock performance	5	8	Face to face / Logbook
332301-000-01-WM-05	Processes and procedures for allocating stock to stores	5	12	Face to face / Logbook

Total Credits = 20

6.2 Soft Skills Included:

Indicate if 5% -10% of soft skills is included and give location notes on the modules where this is found:

5 provide credit value/10% of soft skill(s) is/are included in 332301-000-01-KM-01 and KM-04, 332301-000-01-PM-01, PM-02 and PM-06, 332301-000-01-WM-01 and WM-05

6.3. Foundational Learning:

Indicate if foundational learning and give location notes on the modules where this is found:

None

7. EXIT LEVEL OUTCOMES (ELO) AND ASSOCIATED ASSESSMENT CRITERIA (AAC)

7.1 Exit Level Outcomes (ELO) 1:

Manage supplier relationships and optimise stock performance to ensure consistent supply, minimise costs, and support business objectives. (40%)

Associated Assessment Criteria (AAC) for ELO 1:

- Evaluate the supplier's performance and determine shortfalls in performance according to scenario given.
- Propose practical actions to improve supplier performance that are within the organisation's policy for managing relations with suppliers.
- Analyse product performances and evaluate whether they are performing to, above or below required standards.
- Develop practical proposals for improving merchandise performance.
- Develop practical proposed strategies to clear non-performing merchandise ranges.
- Develop proposed strategies to further enhance the spectrum of good performing ranges of the merchandise.
- Identify the cause where supplier performance is at fault for the non-performance of merchandise and proposals to improve supplier performance are practical and applicable to the circumstances.

7.2 Exit Level Outcomes (ELO) 2:

Allocate stock to stores effectively to ensure optimal inventory levels and meet demand.
(60%)

Associated Assessment Criteria (AAC) for ELO 2:

- Allocate the quantities of stock to meet the expected sales of the stores.
- Allocate the range to meet the target market of the stores.
- Determine stock shortages and transfer stock from stores with high stock levels and low sales.
- Identify stock deliveries impacted upon by unexpected sales and amend the delivery dates accordingly.
- Identify sales and order stock based on stock-on-hand, expected sales and lead times.

8. INTEGRATED ASSESSMENT

8.1 Formative Assessments conducted internally

NB: QCTO standard statements

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.

8.2 Integrated Summative Assessments conducted Internally

NB: QCTO standard statements

In order to qualify for the external summative assessment learners must have a copy of a completed and signed Statement of Work Experience as well as proof of successful completion of the following subjects and modules or alternative programmes where applicable.

8.3 External Integrated Summative Assessment (EISA) – a national assessment

NB: QCTO standard statements provided

An external integrated summative assessment conducted through the relevant 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.

OR

8.3 De-centralised Final Integrated Supervised Assessment (FISA) for Skills Programmes

NB: QCTO standard statements provided

9. INTERNATIONAL COMPARABILITY

NB: Not Applicable to Skills Programmes

9.1 Introductory Statement

The comparison with international qualifications in the area of Wholesale and Retailing was conducted by comparing the Planner qualification Level 5 to undergraduate programmes, outcomes of learning and performance criteria found in the qualifications forming the basis of procurement training. International comparability was executed with qualifications of two countries, namely the Certificate in Purchase in the United States of America (USA) and in the United Kingdom for National Council for Vocational Qualifications (NCVQ) procurement qualification in level 4 (ID Number: Q1025817).

9.2 Detailed Outline

United States of America:

The American Purchasing Society offers a course in Green Purchasing and Sustainability, which discusses the issue of finding suppliers who value sustainable business practices. The American Purchasing Society course covers the following:

- The Foundational Association Purchaser qualification.
- The Certificate Purchasing Professional qualification.
- The Certified Professional Purchasing Manager qualification.

The foundation and purchasing professional qualification provided relevant information to enable international comparison and supports the content because has similar skills and competence focus is clearly identifiable with the South Africa Retail Buyer qualification in terms of:

- International buying.
- Fundamentals of business buying and purchasing management.
- Cost and price analyses.
- Negotiation.
- Quality and service management.
- Managing inventory.
- Accounting, finance and cost management for buyers.
- Ethics.
- Terms and conditions documenting the purchasing agreement.

United Kingdom:

The Distance Learning College in the United Kingdom covering the NCVQ qualification which covers the following:

- Key roles of procurement and supply.
- The sourcing process.
- Effective and efficient administration.
- Pricing arrangements.
- Quality management.
- Teamwork.
- Effective communication.
- Developing supplier relationships.
- Demand and supply.
- Contractual documents.
- Forecasting.

This is an NCVQ Level 4 Retail Buyer qualification.

The similarities between the Higher Occupational Certificate and the international qualifications covers the content and competency requirements for a Planner. The international qualifications, however, spans over shorter time periods and do not focus as strongly on simulated and workplace learning. There are no indications of credit values for any of the international comparisons.

9.3 Concluding Statement

This South African qualification compares well with similar international qualifications. The comparison indicates clearly that there is good alignment in terms of areas of learning and competencies with the retail buyer qualification.

10. ARTICULATION

10.1 Articulation Part- Qualification

NB: QCTO standard statements for options are provided and require qualification details to be inserted

10.1.1 Horizontal Articulation: This qualification articulates horizontally within the QQSF and between other sub-framework(s) as follows:

Within QQSF -

- 103222: Higher Occupational Certificate: Buyer, NQF Level 5, Credits: 110
- 103145: Higher Occupational Certificate: Retail Buyer, NQF Level 5, Credits: 131
- 110942: Occupational Certificate: Supply Chain Practitioner, NQF Level 5, 180 Credits
- 74149: National Certificate: Supply Chain Management, NQF Level 5, 150 Credits

10.1.2 Vertical Articulation: This qualification articulates vertically within the OQSF as follows:

- 111357: Occupational Certificate: Supply Chain Manager, NQF Level 6, Credits: 180
- 91788: Occupational Certificate: Purchasing Officer, NQF Level 6, Credits: 161
- 122237: Advanced Occupational Certificate: Retail Manager, NQF Level 6, Credits: 248

10.1.3 Diagonal Articulation: This qualification articulates diagonally across NQF levels and across Sub-Frameworks:

- There are no diagonal articulation possibilities across Sub-Frameworks,

10.1.4 Validation of Entry Requirements into articulation possibilities provided:

NB: If the entry requirements make articulation possible, answer YES.

No

10.2 Articulation for Skills Programmes

10.2.1 Work Opportunities:

None

10.2.2 Learning Opportunities:

None

11. NOTES

11.1 Additional Legal or Physical Entry Requirements

None

11.2 Criteria for Accreditation

Accreditation requirements, against which Skills Development Providers (SDP) and Assessment Centres, will be accredited, is found in the Curriculum Document, as listed below.

Curriculum Code: 322301-000-01-02

11.3 Encompassed Trades (where applicable)

None

12. ASSOCIATED QUALIFICATION(S)/PART-QUALIFICATION(S):

SAQA QUAL ID	QUALIFICATION TYPE	QUALIFICATION DESCRIPTOR	CURRICULUM CODE	NQF LEVEL	CREDITS
103222	Higher Occupational Certificate	Buyer	332301-000-01-01	5	110

103145	Higher Occupational Certificate	Retail Buyer	332301-000-01- 00	5	131
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