Workplace Finance Mastery

1. Overview

This programme is designed to provide participants with a thorough understanding of core financial principles through a structured exploration of four key modules. It aims to build financial literacy, enabling participants to confidently manage budgets, interpret financial statements, analyse economic data, and contribute to the financial health of their organization.

2. Programme Outcome:

- Explain budgeting concepts relevant to their area of responsibility
- Identify and determine the components of a budget
- Monitor and control actual income and expenditure against budgeted amounts
- Analyse key elements of income statements and balance sheets
- Compile personal statements of assets and liabilities
- Use financial data to inform decision-making
- Apply mathematical techniques to collect, organise, and analyse financial and economic data
- Interpret economic relationships using mathematical analysis
- Access and utilise information from computerised management information systems
- Produce spreadsheets to analyse numerical and financial data
- Contribute to the accuracy and quality of management information systems

Qualification:	Certificate of Completion
Duration:	4-Months
Programme Type:	Category B – Workplace-Based Learning Programme
Programme ID:	PA0077
SAQA US:	242810, 117156, 252036, 12998
NQF Level:	5
Credits:	24
Entry Requirements:	Communication & Mathematical Literacy at NQF 2
Training Options:	**Online** - Each participant will receive access to an online portal, where all programme materials and resources are available. Training is delivered fully online, and participants will join scheduled Microsoft Teams sessions facilitated by a trainer. This mode provides flexibility and allows learners to participate from any location. **Blended** - Blended learning combines both online and face-to-face training. Participants receive access to an online portal for online content, resources, and self-paced activities. They also attend scheduled in-person contact sessions with a facilitator, either at the client's premises or providers campus. This approach offers the flexibility of online learning with the added support of guided, interactive sessions.

Face-to-Face - Each participant will receive training resources, which contains all programme materials and resources. Training is delivered through onsite contact sessions, either at the client's premises or providers campus, where a facilitator conducts the sessions in a classroom environment.

Minimum Participants Required: (1) Online, (1) Blended & (1) Face-to-face

3. Programme Content

- **(242810 US):** Manage Expenditure against a budget
- **(117156 US):** Interpret basic financial statements
- **(252036 US):** Apply mathematical analysis to economic and financial information
- **(12998 US):** Produce spreadsheets using accounting related information technology

4. Topics

- **Module 1:** Budgeting and Expenditure Management
- **Module 2:** Introduction to Financial Statements
- **Module 3:** Financial and Economic Data Analysis
- **Module 4:** Accounting and Spreadsheet Applications

5. Assessments

This programme includes a Portfolio of Evidence (POE) that must be submitted at the end of the programme. The POE include:

- **Knowledge Assessments:** To evaluate theoretical understanding
- **Practical Assignments:** Hands-on tasks related to course topics
- **Workplace Assignments and Logbook:** Application of skills in real-world settings

Successful participants will receive a certificate of completion.

6. Workplace-Based Learning Programme

This WLP is a fusion of academic learning and practical work. The learning is directly applied to the workplace by using client-based mentors and extensive workplace-based portfolio work and assignments. Apart from the obvious benefits of a workplace directed qualification, each WLP qualifies for recognition as a Category B Skills Programme in the Learning Matrix of the Amended BEE codes, which allows for the salaries of participants to be recognized as part of the Skills Development Expenditure.

We trust that the above is in order and look forward to hearing from you for Implementation