

ASSESSOR GUIDE

Production Management



Title:	Define and Understand Production Systems and Production Management						
Applied Title:	Define and Understand Subtropical fruit Production Systems and Subtropical fruit Production Management						
Field:	Agriculture and Nature Conservation						
Sub-Field:	Primary Agriculture						
SETA (SGB):	AgriSETA						
Skills Area:	Production Management						
Context:	Subtropical fruit Production						
US No:	116115	Level:	2	Credits:	2	Notional Hours:	20
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NQF Level **2**

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Directions

Please Note: There is a separate assessment guide for the learner. The learner must use this guide to prepare himself / herself for the assessment.

This assessment guide contains all necessary activities and instructions that will enable the assessor and learner to gather evidence of the learner’s competence as required by the unit standard. This guide was designed to be used by a trained and accredited assessor who is registered to assess this specific unit standard as per the requirements of the AgriSETA ETQA.

Prior to the delivery of the program the facilitator and assessor must familiarise themselves with content of this guide, as well as the content of the assessment guide for learners.

The assessor, facilitator and learner must plan the assessment process together, in order to offer the learner the maximum support, and the opportunity to reflect competence.

The policies and procedures that are applicable during the execution of this assessment are available on the website of the Citrus Academy, contained in a document named Policies and Procedures for Assessment, and must be strictly adhered to. The assessor must familiarise himself with this document before proceeding.

This guide provides step-by-step instructions for the assessment process of:

US No:	116115	Level:	2	Credits:	2
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The step-by-step instructions agree and are conducted in concert with the steps described in the learner assessment guide. The steps are as follows:

<i>Step</i>	<i>Description</i>	<i>Timeframe</i>
1	Learner Assessment Contract	Before delivery of program
2	Learner Declaration of Authenticity	Before delivery of program
3	Diagnostic Assessment of Learning Assumed to be in Place	Before delivery of program
4	Assessment Plan for Gathering of Evidence	Before delivery of program
5	Learner Formative Assessment Activities	During delivery of program, assessment after delivery of program
6	Learner Presentation	After delivery of program
7	Integrated Summative Assessment Tool	After delivery of program
8	Re-assessment Procedures	After completion of assessment
9	Documentation	After completion of assessment
10	Administration and Completion of Portfolio of Evidence	After completion of assessment



Step 1

Pre-Assessment Briefing and Checklist

A pre-assessment briefing for learners is held before the delivery of the program. Use the checklist below to ensure that all these points are addressed and discussed with the learners.

Pre-Assessment Briefing Checklist		
	√	X
Organise resources – people, equipment, venue, etc.		
Explain the purpose of the assessment		
Discuss the standards or criteria to be used		
Discuss assessment roles and accountabilities		
Decide on assessment venues		
Negotiate evidence required, and where or how this evidence may be gathered		
Explain the methods of assessment that will be used during the gathering and summing up of evidence		
Negotiate the date of submission for the activity workbook and the date for the summative assessment		
Discuss resources required for the assessment e.g. equipment, materials, etc.		
Explain the procedure if the learner is found to be not yet competent		
Explain the appeal and review procedures		
Identify any potential learning barriers and negotiate strategies to overcome these		
Complete and sign the assessment plan with the learner		

The learner and assessors must sign the **Learner Contract** in the learner assessment guide.



Step 2

Learner Declaration of Authenticity

The learner is requested to complete and sign the Declaration of Authenticity in the learner assessment guide. This should be checked and co-signed by the assessor.

The format is as reflected in the learner assessment guide.

Step 3

Diagnostic Assessment of Learning Assumed to Be in Place

In the learner assessment guide, the learner is asked to indicate whether they have completed the learning assumed to be in place as prescribed by the unit standard.

The assessor must guide the learners through this step, explaining in detail the content of the mentioned learning areas, because names of learning programs do not always agree with the names of the unit standards, and learners might indicate the incorrect information.

If learners indicate that they have not yet completed the mentioned unit standards, the assessor should prescribe an action plan to allow the learner to obtain the skills required by recommending additional training, competence portfolios, or the relevant RPL assessment for the given unit standards.

The format is as reflected in the assessment guide for learners. Please read it and familiarise yourself with its content.

Step 4

Assessment Plan for Gathering of Evidence

A pro-forma assessment plan for this unit standard has been drafted in the learner assessment guide. Explain the plan to the learner and complete the dates and signatures as indicated.

The format for the assessment plan is as reflected in the assessment guide for learners. Please read it and familiarise yourself with its content. Make a note of the dates agreed upon in the table provided below.

Learner and Assessor Assessment Plan		
Unit Standard	Define and Understand Production Systems and Production Management	
Registration Number	116115	
<i>Step</i>	<i>Description</i>	<i>Completion / Submission Date</i>
Step 5	Learner Formative Assessment Activities	
Step 6	Learner Presentation	
Step 7	Integrated Summative Assessment	
Step 8	Re-Assessment Procedures	
Step 9	Documentation	
Step 10	Administration and Completion of Portfolio of Evidence	

Step 5

Learner Formative Assessment Activities

The learner assessment guide contains comprehensive activities and worksheets that the learner must complete during the delivery of the learning program. It is imperative that these activities be completed as part of the learning process in order to give the learner the opportunity to develop the skills, knowledge and attitudes that are required for competence.

Learners must complete all the activities in the workbook.

Learners must be encouraged to take control of their learning by indicating areas in the workbook where they experience difficulty.

The learner hands in the learner assessment guide to the assessor or the facilitator, only if the facilitator is a subject matter expert, for the assessment of the formative assessment activities. The assessment of these activities must be done according to the prescribed benchmarks and according to the following marking matrix.

The learner should not move on to the next step before this step has been completed and learners show sufficient capacity and readiness for summative assessment. If problems areas are identified, the learner should be guided with a developmental action plan, which is documented separately and signed by the learner, the facilitator and the assessor.

Model answers are provided below.

Activity 1 – Group Discussion

Hold a group discussion about the sub-tropical fruit export market under leadership of your facilitator.

Resources

For more information and background, look at the following websites:

- Fresh Produce Exporters Forum(FPEF): www.fpef.co.za
- South African Fruit Journal (SAFJ): www.safj.co.za

Write down some key notes on what was discussed

No model answer provided due to variation in discussion topics.

Activity 2 – Group Project

List all fixed (natural) and mobile resources required on a sub-tropical fruit farm, and identify the most likely source (input market) for each resource. Use the following methods:

- Ask the procurement or production manager of a sub-tropical fruit farm
- Visit local suppliers to the agricultural industry
- Study trade publications
- Find the resources on the Internet

Complete the sheet below.

<i>Fixed (Natural) Resources</i>	<i>Input Markets</i>	<i>Mobile Resources</i>	<i>Input Markets</i>
Land	Other farmers, government	Trees	Sub-tropical fruit nursery
Water	Local Water Users' Association, municipality	Labour	Farm workers
		Knowledge	Consultants, experts
		Capital	Banks and other financial institutions

Activity 3 – Case Study

Read the following case study and answer the questions in the worksheet that follows:

David Dube has recently been appointed export manager for Katsi-Katsi Sub-tropical fruit Group. He is feeling very happy and confident in his new job. He used to work as an export supervisor at Durban Harbour, so he feels confident that he will have all the contacts needed to perform his duties well and save his new employer a lot of money. Accordingly he spends a lot of his time phoning, emailing and keeping in contact with his old friends and colleagues. He is also getting to know his new colleagues and they are constantly telling him how "busy" and "hectic" the harvest and packing season is. He is sure that they will know what is expected of them when the time comes.

1. Do you think that David is doing his job as export manager well? Motivate your answer.

No. David should be preparing of the harvest and packing season.

2. Name the five basic management principles that you think he can apply to help him be more successful.

- a. Setting objectives
- b. Planning
- c. Scheduling
- d. Organising
- e. Implementation
- f. Coordination
- g. Monitoring

3. Give examples of two things that David should think about to help him to plan better.

- a. How much fruit will be exported?
- b. How will our fruit be exported?
- c. Where will the fruit be exported to?
- d. When will the fruit be exported?

4. Give a step-by-step outline of the components of the planning process.

- a. Determine the crop yield estimate and estimated pack-out percentage.
- b. Research and select a distribution channel.
- c. Research and select export market(s).
- d. Determine the expected packing time and export departure dates.

5. Explain in your own words what you understand by the "essence of scheduling", and apply a practical example that would help David in his job.

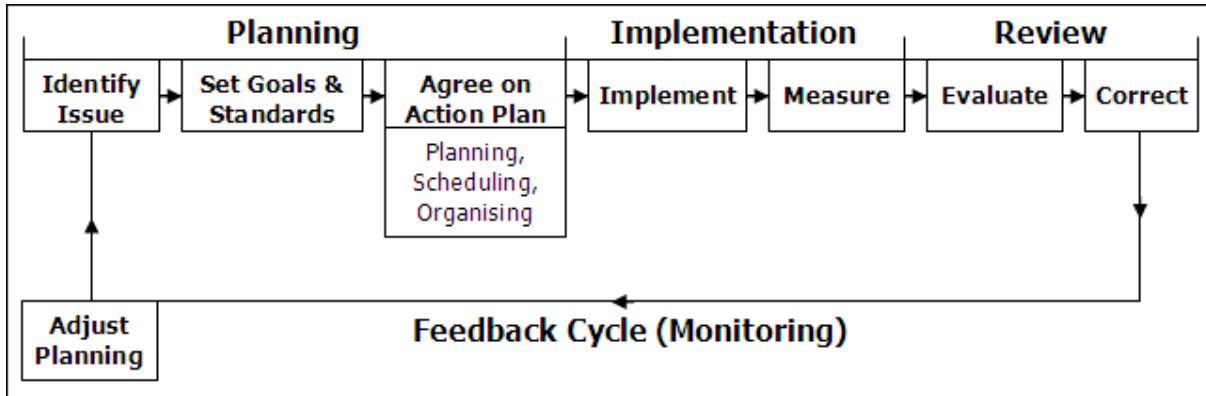
**Scheduling means setting planned actions to a timeframe.
 (Example should be relevant.)**

6. Do you think that David is organising the appropriate human resources that is required to make a success of the export for the current year? Explain your answer and give practical suggestions and examples where necessary

**No, David has not determined the human resource needs and therefore cannot organise the necessary human resources.
 (Examples and suggestions should be relevant.)**

7. Do you think that David has a good strategy for implementation during the busy export season? Explain what improvements you would make.

No. He should improve his strategy by setting objectives and applying the following model:



8. If you had to recruit an export manager like David, what kinds of characteristics would you look for?

Someone who has a clear track-record of successful implementation in the following:

- a. Define, understand and clearly state the overall goal or objective of the operation or project, for example define the standards to which the end product has to comply;
- b. List the actions needed to achieve the end result, including naming the individuals who are responsible for the work and the deadline dates by when the various tasks have to be completed;
- c. Define ways of evaluating and measuring progress and use results of this constant review process to influence future planning and operations.

9. Define and explain the concept of control, feedback, adaptation and correction, in your own words.

**Control means measuring the success of the process
 Feedback means receiving information on the process
 Adaptation means making changes to the process itself
 Correction means correcting process implementation**

Activity 4 – Worksheet

Complete the worksheet below.

Explain in your own words what you understand when we refer to the following additional basic managerial

1. Decision-making	Weighing all the options and selecting the best course of
2. Leadership	Leadership is about giving direction, aligning people.
3. Communication	Good communication is about ensuring that everyone
4. Motivation	Motivation is about helping people to be passionate about

	their work.
5. Delegation	Delegation about entrusting authority for performing a task to a subordinate, while retaining responsibility for the outcome.
6. Discipline	Discipline is about doing what you are supposed to when you are supposed to and how you are supposed to do it.
7. Human resource management	The functions of human resource management is staff selection and recruitment, succession planning and career path development, staff training, setting remuneration policy, setting and monitoring performance management policy, ethics and disciplinary procedures, and industrial relations.
Give an example of a decision that you have taken in the past.	
(No model answer)	
Explain in detail the process that you followed during the decision making process, in order to reach that specific decision.	
(Answer relates to previous)	
List five characteristics of good communication.	
a. Good listening b. Appropriate body language c. Properly structured verbal or written content	
Explain the essence of motivation with a practical example for a sub-tropical fruit farm.	
Motivation is about helping people to be passionate about their work. (Example must be relevant, with possible reference to participative goal setting.)	
Explain the requirements of good leadership.	
d. Develop a vision of the future; e. Influence the creation of teams that understand the vision and goals; f. Energise people by understanding and satisfying their human needs; and g. Introduce new, more effective ways of doing things	
Explain the essence of delegation with a practical example for a sub-tropical fruit farm.	
Delegation about entrusting authority for performing a task to a subordinate, while retaining responsibility for the outcome. (Example must be relevant.)	
Explain the essence of discipline with a practical example for a sub-tropical fruit farm.	
Discipline is about doing what you are supposed to when you are supposed to and how you are supposed to do it. (Example must be relevant.)	
Give four key elements of human resource management.	
h. Staff selection and recruitment i. Succession planning and career path development j. Staff training k. Setting remuneration policy l. Setting and monitoring performance management policy m. Ethics and disciplinary procedures n. Industrial relations	

Step 6

Learner Presentation

Before the summative task is undertaken, the learner must be reminded of what is expected from him / her in terms of summative and reflexive competence. Read and explain to the learner this section in the learner assessment guide. The learner and assessor must sign off this section to acknowledge that this step was completed. The format is as reflected in the assessment guide for learners. Please read it and familiarise yourself with its content.

The actual job description need not be in an advertisement format. The exercise is aimed at allowing learners to think through the role of a specific manager.

- Use the planning and questioning format below to help you collect evidence for foundational and embedded knowledge as prescribed by the outcomes of the unit standards.
- Provide the questions as listed to the learners as a guide.
- Ensure that you apply the exact same methodology for each learner in order to ensure that VACS principles are adhered to.
- The benchmark for learner competence is an 85% overall test score.
- Only a suitably qualified and registered assessor who is ALSO a subject matter expert in this specific field can mark this assessment tool for learner assessment.
- If no such a person can be found to assess the learner, then it is advised that a qualified assessor consults with the appropriate subject matter expert prior to the assessment in order to establish key points for competence and / or uses model answers as supplied by a subject matter expert to allocate marks. The subject matter expert should be consulted for any answers that the assessor might have queries on.
- Use a header in the following format for each test paper:

Unit Standard:	116115	NQF Level:	2
Learner Name			

What must the person be able to do?	2%
What must the person be able to plan?	5%
What must the person be able to schedule?	5%
Who or what must the person be able to organise?	5%
What will the person have to implement?	5%
What leadership qualities must the person have?	10%
What will the person have to control?	2%
Who or what will the person be in charge of?	10%
Who will the person report to?	10%

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Skills Area: Production Management

Level: 2

Unit Standard: 116115

Who must the person give feedback to?	2%
Will the person have to be adaptable?	5%
If the person has to be adaptable, what does that mean?	2%
What decisions must the person make?	5%
Must the person be a good communicator?	2%
How will the person have to motivate others?	5%
Who will the person delegate to?	5%
What disciplinary procedures are relevant to the person?	10%
Are there any goals or systems that the person must implement, control or set?	10%

Step 7

Integrated Summative Assessment Tool

Two assessment tools are provided in this step, being:

1. Practical Assessment Tool
2. Attitudes and Attributes Assessment Tool

These assessment tools have been drafted in their entirety and follow below. It must be copied and completed for every learner in the same manner and according to the same procedure.

Learners must not be given these tools in preparation for summative assessment. This corresponding step in the Learner Assessment Guide is a direct reflection of these tools and is drafted in a format that is appropriate to the learner's level of language competence.

1. Practical Assessment Tool

- All the sections of this document must be completed and signed where appropriate by the learner and the assessor.
- The learner must be given appropriate feedback and told whether they were declared competent or not yet competent. The assessor must record the appropriate commentary and guide the learner with detailed action plans for areas where the learner is found not yet competent.
- In line with the policies and procedures, the assessor must offer learners an opportunity for feedback on the assessment as well as an opportunity to appeal against the declaration.
- Should learners be found not yet competent, a detailed action plan with specific commentary on development must be drafted together with the learner and the facilitator in order to develop the necessary competence. A date for re-assessment must be agreed upon with the learner.
- All the evidence must be signed and copied, if necessary, to be placed in the learner's portfolio of evidence.
- Use this checklist to help collect evidence of practical competence as prescribed by the specific outcomes of the unit standards.
- Ask the questions as listed in order to test foundational and reflexive competence relevant to the specific task.
- Ensure that the exact same methodology is applied for each learner in order to ensure that VACS principles are adhered to.
- The benchmark for learner competence in this tool is 85% in EVERY task.
- Only a suitably qualified and registered assessor who is ALSO a subject matter expert in this specific field can use this assessment tool for learner assessment.
- If no such a person can be found to assess the learner, then it is advised that a qualified assessor consults with the appropriate subject matter expert prior to the physical assessment in order to establish key points for observation. The subject matter expert must attend the assessment in order to judge competence of the learner.

2. **Attitudes and Attributes Assessment Tool**

- Use this rating scale to judge the learner's CCFO competence according to the unit standard.
- The learner's entire performance and all the stages of learning, as well as all gathered evidence must be considered for this section.
- It is advised that the assessor consult with facilitators, mentors, coaches and supervisors in order to ensure that an objective rating is allocated.
- A rating between 1 and 5 should be given, as follows:

<i>Rating</i>	<i>Description</i>
1	No evidence can be found
2	The evidence found is weak and this is still a major development area for the learner
3	The evidence found meets the average expectation for a learner on this level
4	The evidence found is of a high quality and exceeds the average standard expected
5	The evidence found is outstanding and the learner attitudes and traits are very well developed

- Learner must be given constructive feedback on each rating.
- Ensure that you apply the exact same methodology for each learner in order to ensure that VACS principles are adhered to.
- The benchmark for learner competence in this tool is 3:5 in EVERY CCFO.

At the end of this step, an assessment feedback form is provided which must be completed and signed by the assessor, learner and moderator, where applicable.

Practical Assessment Tool				
Unit Standard:	116115	NQF Level:	2	
Learner Name				
Tasks and Question	Criteria Checked For / Key Concepts Observed (to be completed as per the real contexts and examples used whilst in the field)	Learner Competent	Learner Not Yet Competent and Recommended Revision	Assessor Comments
Draw a flow diagram in the form of a A1 poster, with pictures and / or sketches and captions explaining the following relationships related to tropical production.	The interaction of the producer with the market. Include: Input market and output market Include: The activities that take place between input markets, production systems and output markets			
	The limited nature of natural resources is demonstrated Include: Natural resources such as soil, land and water			
	The reciprocal interaction between agricultural processes and environmental factors Include: What effect the environment has on agricultural practices – positive / negative (e.g. Production limitations, environmental legislations) Include: What effect agricultural practices have on the environment – positive / negative (pollution, erosion)			
	The concept of optimal usage of resources and optimisation of outputs Include: Resources such as capital, land, water, facilities, human resources, information and raw materials, etc.			



Attitudes and Attributes Assessment Tool		
Use the following rating table in this assessment:		
Rating	Description	
1	No evidence can be found	
2	The evidence found is weak and this is still a major development area for the learner	
3	The evidence found meets the average expectation for a learner on this level	
4	The evidence found is of a high quality and exceeds the average standard expected	
5	The evidence found is outstanding and the learner attitudes and traits are very well developed	
CCFO Criteria		
		Rating
Identifying – The learner can identify problems and deficiencies correctly.		
Working in a Team – The learner is able to work well as member of a team.		
Organising – The learner works in an organised and systematic way whilst performing all tasks and tests.		
Communicating – The learner is able to communicate his or her knowledge orally and in writing, in a way that shows what knowledge he or she has gained.		
Demonstrating – The learner is able to show and perform the tasks required correctly.		
Contributing – The learner is able to link the knowledge, skills and attitudes that he or she has acquired in this module of learning to specific duties in their job or in the community where he or she lives.		
Science – Learner is able to utilise and use science and technology effectively		
Collecting – Learner can effectively gather information		





Assessment Feedback Form			
	Comments / Remarks		
Feedback to learner on assessment and / or overall recommendations and action plan for competence			
Feedback from learner to assessor			
Assessment Judgement	You have been found: <input type="radio"/> Competent <input type="radio"/> Not yet competent in this unit standard	Actions to follow: <input type="radio"/> Assessor report to ETQA <input type="radio"/> Learner results and attendance certification issued	
Learner's Signature		Date:	
Assessor's Signature		Date:	
Moderator's Signature		Date:	



Step 8

Re-Assessment Procedures

- Note that only outcomes on which the learner was found not yet competent must be re-assessed.
- The same procedures in steps 6 and 7 are repeated.
- The tool must be adapted at discretion of the assessor. Best practice is not to present the exact same format and questions if possible.
- Use your expertise and judgement to ensure that the method of re-assessment remains integrated and relevant to the expected outcomes.

Step 9

Documentation

The following documentation is addressed in this step:

1. Learner and assessor information reports;
2. Assessor report and summative evidence collection summary;
3. Learner assessment re-actionnaire;
4. Assessor's assessment review and improvement document;
5. Assessment appeal form

1. Learner and Assessor Information Forms

The learner information form is in the assessment guide for learners. The assessor information form follows. These forms must be completed for each individual learner and placed in the learner's portfolio of evidence.

2. Assessor Report and Summative Evidence Collection Summary

This report follows after the information report. Use it to summarise the findings during assessment. Please complete the copy of this report that is in the learner assessment guide.

3. Learner Assessment Re-Actionnaire

A pro-forma for the learner assessment re-actionnaire is included in the learner assessment guide. Ask the learner to complete this form and sign it.

4. Assessor's Assessment Review and Improvement Document

The assessor is expected to complete the assessor review of the assessment process, using the pro-forma document of which an example follows. Please complete the copy of the document in the learner assessment guide. This document must be discussed with the learner and any learner commentary should be recorded.

5. Assessment Appeal Form

The assessment appeal form is also provided in the learner assessment guide. Assist the learner to complete the document if necessary.

The learner must be requested to sign-off all reports and documents before they are placed in the portfolio of evidence.



Assessor Information Form				
Unit Standard	116115			
Program Date(s)				
Surname				
First Name				
Company Name				
Job / Role Title				
Home Language				
Gender	Male		Female	
Race	African	Coloured	Indian/Asian	White
Employment	Permanent		Non-permanent	
Disabled	Yes		No	
Date of Birth				
ID Number				
Contact Telephone Numbers				
Email Address				
Postal Address				



Assessor's Assessment Review and Improvement Document	
Issues	Comments
Did the assessment go according to plan?	
Did anything unexpected happen?	
Were you pleased with the assessment decision; i.e. was it what you expected?	
How could the process have been carried out more efficiently?	
How could the process of assessing the knowledge be improved?	
How could the Performance Observation checklist be improved?	
Was the evidence you gathered sufficient to make a judgment of competence?	
Was the way you obtained feedback from the learner effective?	
Were you pleased with the way you communicated your decision to the learner? If not, how could this have been improved?	
How would you improve the assessment process?	

Any learner has the right of appeal against any not-yet-competent decision by the assessor. If the learner wishes to appeal, please assist him / her to complete the form below.

Appeal Form			
I hereby appeal against the outcome of my assessment.			
Date:			
Learner's Name:			
Assessors Name:			
Organisation:			
Assessment Details: Criteria, role, standards Used, etc.			
Issue to be Reviewed:			
Learner's Signature		Date:	
Assessor's Signature		Date:	

Step 10

Administration and Completion of Portfolio of Evidence

All the documents or copies thereof, as prescribed previously, must be kept on file as part of the learner portfolio of evidence.

Learner's portfolio of evidence must be readily available for internal and external moderation and verification by the appropriate practitioners, until after the verification process has taken place. The portfolio of evidence may then be kept or returned to the learner according to the service provider's policy.

The prescribed learner results form should be submitted to the ETQA or the National Learner Database as per the SETA procedure.