



# ASSESSOR GUIDE

## Production Management



<b>Title:</b>	<b>Explain the planning and scheduling of tasks in a production environment</b>						
<b>Applied Title:</b>	<b>Explain the planning and scheduling of tasks in a subtropical fruit production environment</b>						
<b>Field:</b>	Agriculture and Nature Conservation						
<b>Sub-Field:</b>	Primary Agriculture						
<b>SETA (SGB):</b>	AgriSETA						
<b>Skills Area:</b>	Production Management						
<b>Context:</b>	Subtropical fruit Production						
<b>US No:</b>	116218	<b>Level:</b>	3	<b>Credits:</b>	3	<b>Notional Hours:</b>	30 hours
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NQF Level **3**

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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 Sub-tropical fruit 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:

<b>US No:</b>	116218	<b>Level:</b>	3	<b>Credits:</b>	3
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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.

<b>Pre-Assessment Briefing Checklist</b>		
	√	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.

<b>Learner and Assessor Assessment Plan</b>		
<b>Unit Standard</b>	Explain the Planning and Scheduling of Tasks in a Production Environment	
<b>Registration Number</b>	116218	
<i>Step</i>	<i>Description</i>	<i>Completion / Submission Date</i>
<b>Step 5</b>	Learner Formative Assessment Activities	
<b>Step 6</b>	Learner Presentation	
<b>Step 7</b>	Integrated Summative Assessment	
<b>Step 8</b>	Re-Assessment Procedures	
<b>Step 9</b>	Documentation	
<b>Step 10</b>	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 – Research Report

Investigate the relationship between production planning and the needs of the market and industry standards to be applied. Write a report on your findings, and add recommendations that you would give in terms of production planning for your farm.

#### Key Concepts:

- **Cultivar variety**
- **External and internal fruit quality**
- **Fruit size**
- **Food safety (sanitary and phytosanitary issues)**
- **Good agricultural practices**
- **Environmental awareness**

**Recommendations must be relevant to improving factors listed.**

#### Activity 2 – Production Calendar

Draw-up a calendar with the months of the current year. Record the correct scheduling dates for inputs, processes and outputs. Take the following into account:

- Fertilising
- Pruning
- Harvesting
- Selling

Present your calendar to the assessor and the rest of your class, explaining the concepts and your rationale.

**(Similar to calendar below)**

<i>Month</i>	<i>Production Processes</i>					
	<b>Fertilisation</b>	<b>Pest and Disease Control</b>	<b>Irrigation</b>	<b>Pruning</b>	<b>Harvesting</b>	<b>Packing</b>
<b>July</b>						
<b>August</b>						
<b>September</b>						
<b>October</b>						
<b>November</b>						
<b>December</b>						
<b>January</b>						
<b>February</b>						
<b>March</b>						
<b>April</b>						
<b>May</b>						
<b>June</b>						

**Activity 3 – Production Team Interviews**

As a group, interview a working team on a sub-tropical fruit farm. Record in detail the following:

**(No model answer due to variance in circumstances.)**

<b>Statistical Information</b>	
How many members are there in the team?	
How is the team structured?	
What is the average wage of the team?	
What kinds of inputs are needed for them to produce a result?	
What are their production goals?	
What kinds of outputs have they produced during the past 12 months?	

Analyse the group findings above, and take into account what you have learnt regarding production optimisation techniques. Discuss how you think the productivity and production optimisation of this team can be improved. Write down your recommendations.

**(No model answer due to variance in circumstances.)**

**Activity 4 – Report Analysis**

Swap the production calendar that you drafted in activity 2 with another learner. Analyse his / her plan, and write comments regarding improvements that can be made.

Take the following into account:

- Recording of the correct scheduling dates for inputs, processes and outputs.
- Fertilising
- Pruning
- Harvesting
- Selling

**(No model answer due to variance in circumstances.)**

**Assessment Guide – Assessor and Facilitator**

**Skills Area:** Production Management

**Level:** 3

**Unit Standard:** 116218

<b>Marking Matrix and Assessor Report for Formative Assessment Activities</b> <b>Formative Evidence Collection Summary for Unit Standard 116218 – Level 3</b>					
	<b><i>Action Required from Learner to Develop Competence</i></b>	<b><i>Competence Assessments</i></b>	<b><i>Standard for Activity</i></b>	<b><i>Allocation of Marks</i></b>	<b><i>Feedback to Learner and Comments on Evidence</i></b>
<p><b><i>Specific Outcome 1:</i></b>  <b>Explain production planning and the different levels of planning that can be used in production planning activities.</b></p> <p><i>Range:</i> Production planning refers to but is not limited to the choices between enterprises and processes, inputs, processing processes, markets and standards, etc. to which the final product should comply.</p>	Attend classroom lesson, participate and ask questions	Activities in learner activity book were completed correctly	Activity answers must be at least 85% correct  A signature + commentary from the supervisor / coach / mentor or facilitator in learner Workbook	As per model answer sheet	
<p><b><i>Specific Outcome 2:</i></b>  <b>Demonstrate an understanding of scheduling.</b></p> <p><i>Range:</i> Scheduling refers to but is not limited to the day-to-day activity planning of the various production processes. Activities refer to but are not limited to the timely usage of the specific inputs, processes and outputs scheduled such as</p>	Attend classroom lesson, participate and ask questions	Activities in learner activity book were completed correctly	Activity answers must be at least 85% correct  A signature + commentary from the supervisor / coach / mentor or facilitator in learner Workbook	As per model answer sheet	

**Assessment Guide – Assessor and Facilitator**

**Skills Area:** Production Management

**Level:** 3

**Unit Standard:** 116218

<b>Marking Matrix and Assessor Report for Formative Assessment Activities</b>					
<b>Formative Evidence Collection Summary for Unit Standard 116218 – Level 3</b>					
	<i><b>Action Required from Learner to Develop Competence</b></i>	<i><b>Competence Assessments</b></i>	<i><b>Standard for Activity</b></i>	<i><b>Allocation of Marks</b></i>	<i><b>Feedback to Learner and Comments on Evidence</b></i>
planting dates, fertilising, pruning, harvesting, feeding, mating periods, vaccinations, selling, etc.					
<p><b>Specific Outcome 3: Demonstrate production optimisation techniques.</b></p> <p><i>Range:</i> Optimising techniques include but are not limited to the recording of parameters related to inputs, processes and output, basic analysis and adaptation thereof.</p>	Attend classroom lesson, participate and ask questions	Activities in learner activity book were completed correctly	<p>Activity answers must be at least 85% correct</p> <p>A signature + commentary from the supervisor / coach / mentor or facilitator in learner Workbook</p>	As per model answer sheet	
<p><b>Specific Outcome 4: Demonstrate the ability to make meaningful comments on the planning and scheduling process.</b></p> <p><i>Range:</i> Comment may be made but is not limited to the timely usage of the specific inputs, processes and outputs scheduled such as planting dates, fertilising, pruning, harvesting, feeding, mating periods.</p>	Attend classroom lesson, participate and ask questions	Activities in learner activity book were completed correctly	<p>Activity answers must be at least 85% correct</p> <p>A signature + commentary from the supervisor / coach / mentor or facilitator in learner Workbook</p>	As per model answer sheet	

**Assessment Guide – Assessor and Facilitator**

**Skills Area:** Production Management

**Level:** 3

**Unit Standard:** 116218

<b>Marking Matrix and Assessor Report for Formative Assessment Activities</b>					
<b>Formative Evidence Collection Summary for Unit Standard 116218 – Level 3</b>					
	<i><b>Action Required from Learner to Develop Competence</b></i>	<i><b>Competence Assessments</b></i>	<i><b>Standard for Activity</b></i>	<i><b>Allocation of Marks</b></i>	<i><b>Feedback to Learner and Comments on Evidence</b></i>
vaccinations, selling, etc.					
<b>US CCFO:</b> Identifying	Attends all lessons, activities, practical and completes activities and workbook as per instructions	Attendance register and facilitator report	Learner must at least be present and no negative commentary about the learner should be made in the facilitator report.	N/a	
<b>US CCFO:</b> Working					
<b>US CCFO:</b> Organising					
<b>US CCFO:</b> Communicating					
<b>US CCFO:</b> Science					
<b>US CCFO:</b> Demonstrating					
<b>US CCFO:</b> Contributing					
<b>US CCFO:</b> Identifying					

**Assessment Guide – Assessor and Facilitator**

**Skills Area:** Production Management

**Level:** 3

**Unit Standard:** 116218

<b>Assessment Feedback Form – Activity Workbook</b>			
	<b>Comments / Remarks</b>		
Feedback to learner on assessment			
Feedback from learner to assessor			
<b>Learner's Signature</b>		<b>Date:</b>	
<b>Assessor's Signature</b>		<b>Date:</b>	

## 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.

- 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:

<b>Unit Standard:</b>	116218	<b>NQF Level:</b>	3
<b>Learner Name</b>			

- The assessor should use the questions below as a marking matrix and to gather evidence and to check for completeness.

What short-term things have to be planned for?	20%
What medium-term things have to be planned for?	
What long-term things have to be planned for?	
Explain what goals this person has to set and how he/she will approach setting these goals?	5%
Must the person draw up a budget? If so, what must be budgeted for?	10%
What must the person plan for in terms of expense?	10%
What must the person plan for in terms of income?	
How will the person's planning and decisions influence the end product?	10%
What must the person schedule?	10%
What scheduling techniques will this person use?	10%



**Assessor Guide**

**Skills Area:** Production Management

**Level:** 3

**Unit Standard:** 116218

How will this person control the schedules that are drawn up?	10%
What records will this person keep?	10%
Why will these records be kept?	
What can the person expect in terms of adapting plans, schedules and management techniques?	5%

## Step 7

### Integrated Summative Assessment Tool

One assessment tool is provided in this step, being:

#### 1. Attitudes and Attributes Assessment Tool

This assessment tool has been drafted in its entirety and follows 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. **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:

<b><i>Rating</i></b>	<b><i>Description</i></b>
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.

### Attitudes and Attributes Assessment Tool

Use the following rating table in this assessment:

<b>Rating</b>	<b>Description</b>
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

<b>CCFO Criteria</b>	<b>Rating</b>
<b>Identifying</b> – The learner can identify problems and deficiencies correctly.	
<b>Working in a Team</b> – The learner is able to work well as member of a team.	
<b>Organising</b> – The learner works in an organised and systematic way whilst performing all tasks and tests.	
<b>Communicating</b> – 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.	
<b>Demonstrating</b> – The learner is able to show and perform the tasks required correctly.	
<b>Contributing</b> – 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.	
<b>Science</b> – Learner is able to utilise and use science and technology effectively	
<b>Collecting</b> – Learner can effectively gather information	

<b>Assessment Feedback Form</b>			
	<b>Comments / Remarks</b>		
Feedback to learner on assessment and / or overall recommendations and action plan for competence			
Feedback from learner to assessor			
<b>Assessment Judgement</b>	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	
<b>Learner's Signature</b>		<b>Date:</b>	
<b>Assessor's Signature</b>		<b>Date:</b>	
<b>Moderator's Signature</b>		<b>Date:</b>	

## **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.

<b>Assessor Information Form</b>				
<b>Unit Standard</b>	116218			
<b>Program Date(s)</b>				
<b>Surname</b>				
<b>First Name</b>				
<b>Company Name</b>				
<b>Job / Role Title</b>				
<b>Home Language</b>				
<b>Gender</b>	Male		Female	
<b>Race</b>	African	Coloured	Indian/Asian	White
<b>Employment</b>	Permanent		Non-permanent	
<b>Disabled</b>	Yes		No	
<b>Date of Birth</b>				
<b>ID Number</b>				
<b>Contact Telephone Numbers</b>				
<b>Email Address</b>				
<b>Postal Address</b>				

<b>Assessor's Assessment Review and Improvement Document</b>	
<b>Issues</b>	<b>Comments</b>
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.

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

## **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.