

ASSESSMENT GUIDE FOR ASSESSORS & FACILITATORS

Marketing

Level 4

Copyright ©



P.O. Box 461, Hillcrest, 3650
(031) 313-3364

Title:		Participate in the Development and Management of an Agricultural Marketing Plan					
Applied Title:		Participate in the Development and Management of a Marketing Plan for Citrus					
Field:		Agriculture and Nature Conservation					
Sub-Field:		Primary Agriculture					
SETA (SGB):		AgriSETA					
Skills Area:		Marketing					
Context:		Citrus Production					
US No:	116684	Level:	4	Credits:	3	Notional Hours:	30
Author:		L. von Broembsen					

Based on the Production Guidelines of:



Supported by:



Unit standard alignment and assessment tool development:

Cabeton Training and Development

Project coordinator:

Jacomien de Klerk

Disclaimer

By accepting this document and reading its contents you agree to be bound by the terms of this disclaimer.

The use of the contents of this document is at your own risk. Neither the Citrus Academy nor the CRI or the CGA warrant that the content of this document is suitable for your intended use or that it is free of inaccuracies or omissions. The opinions and advice expressed in this document are not necessarily those of the Citrus Academy, the CRI or the CGA. The Citrus Academy, the CRI and the CGA, their directors, officers, employees, agents and contractors shall not be liable for any loss or damage of any nature suffered by any person as a direct or indirect result of the use of, or inability to use any advice, opinion or information contained in this document, or any misrepresentation, misstatement or omission, whether negligent or otherwise, contained in this document.

You indemnify the Citrus Academy, the CRI and the CGA against any claim by any third party against the Citrus Academy, the CRI or the CGA, their directors, officers, employees, agents or contractors arising from, or in connection with, the use of, or reliance on, the contents of this document. It is your responsibility to determine suitability of the contents of this document for your intended use.

Table of Contents

Directions 4

Step 1 5

Step 2 6

Step 3 7

Step 4 8

Step 5 9

Step 6 18

Step 7 20

Step 8 23

Step 9 24

Step 10 30



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:	116684	Level:	4	Credits:	3
---------------	--------	---------------	---	-----------------	---

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:

Step	Description	Timeframe
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	Draft a Marketing Plan	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	Participate in the development and management of an agricultural marketing plan	
Registration Number	116684	
<i>Step</i>	<i>Description</i>	<i>Completion / Submission Date</i>
Step 5	Learner Formative Assessment Activities	
Step 6	Draft a Marketing Plan	
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 – Mind Map
Draw a mind map detailing the structure and flow of a marketing plan and its elements as related to citrus marketing.
Answers will vary according to learner context, but should include the following elements: • Product ◦ Product mix ◦ Product strengths and weaknesses ◦ Brand ◦ The product portfolio • Market share objectives ◦ By products ◦ By customer segments ◦ By geographical markets • Price ◦ Pricing objectives ◦ Pricing method, for instance cost plus, demand based, or competitor indexing ◦ Pricing strategy, for instance skimming or penetration ◦ Discounts and allowances • Promotion ◦ Promotional goals ◦ Promotional mix • Distribution ◦ Geographical coverage ◦ Distribution channels ◦ Physical distribution and logistics

Activity 2 – Group Research and Multimedia Presentation

Do research related to citrus on the key components of a strategic marketing plan that are listed below. Give a multimedia presentation on each component. Include recommendations regarding application and strategy for inclusion in the strategic marketing plan of your organisation.

1. Basic steps in identifying the strategic environment of citrus in South Africa.
2. Identifying and analysing key components of the marketing value and supply chain for citrus utilising a systems approach.
3. The demand chain for citrus, utilising a systems approach.

Make key notes of all the presentations that are made and include evidence of your presentation to the workbook.

Answers will vary according to learner context, but should include the following elements:

1. **Information gathering, consult key industry bodies, use Partiplan or other method in round-table discussions to include as many impressions as possible.**
2. **Identify components in chain per tables or diagram, analyse components through information gathering and analysis.**
3. **Reference to systems approach should include reference to specialisation, grouping, coordination, emergent properties.**

Activity 3 – Group Research

Do research and draft an **outline** for a rolling citrus marketing plan for your organisation below. The outline must be completed in writing and must have supporting multimedia presentations, as well as research evidence. Include the following components:

- Choice of market and profile of consumer
- Market places
- Market positioning
- Pricing
- Packaging
- Promotion
- Logistics and distribution
- Short, medium and long term plans
- Monitoring and periodical adjustments.

Answers will vary according to learner context, but should include a draft outline in preparation for information and contextual examples for each of the elements listed.

Activity 4 – Research and Make Recommendations

Allocate media search and research tasks to various group members for inclusion in your plan, as follows:

- The selection and interpretation of local and export market opportunities for citrus
- Identification and analysis of the critical success factors in the local and export marketing value and supply chain and support services for citrus

Identification and assessment of in the following areas of the marketing mix:

- Product positioning of citrus
- Pricing of citrus
- Packaging our citrus product
- Freight logistics in the citrus sector
- Promotion strategies for selected local and / or export markets for citrus
- The structuring of the marketing plan over a period of at least three financial years, indicating short, medium and long term marketing goals and action plans

Include evidence of the research that you have done with your workbook.

Answers will vary according to learner context, but should include detailed information and contextual examples for each of the listed elements, including traceable references.

Activity 5 –Group Multimedia Presentation and Plan

In your group, draft a rolling marketing plan for citrus produced by your organisation, using the framework drafted in activity 3 and the research done in activity 4. The plan should be presented in writing as well as with supporting multimedia elements and research evidence.

Attach the written plan and evidence of the presentation to your learner workbook.

Answers will vary according to learner context, but should include detailed information, slotted into the framework prepared for Activity 3, and quoting references from Activity 4. The presentation should include interpreted information and contextual examples for each of the following elements:

- Choice of market and profile of consumer
- Market places
- Market positioning
- Pricing
- Packaging
- Promotion
- Logistics and distribution
- Short, medium and long term plans
- Monitoring and periodical adjustments.

Activity 6 – Group Discussion

Hold a group discussion and write down key notes on the various risks impacting on the marketing of citrus and how they can be identified and evaluated. Consider the following key areas:

- Uncontrollable risks
- Controllable agricultural risks
- Agricultural business specific risks

Draw conclusions and write key notes on how these risk factors can be provided for in a rolling marketing plan.

Answers will vary according to learner context, but should include key-notes surrounding the following factors:

Uncontrollable Risks

- Climate
- Worldwide oversupply
- Mismatches in supply and demand
- Currency fluctuations
- The performance of competitors' currencies
- The status of the economies of importing countries
- Competition from new entrants
- Competition with other food kinds
- Foreign government assistance and subsidies
- Uniform exporters and export agents
- Unforeseen global crises
- Stricter quality and food safety standards
- Changes in consumer fruit preferences
- Consolidation of overseas supermarket chain stores

Controllable risks

- Cultivars selection
- Pest and disease control measures
- Recordkeeping
- Choosing an export agent
- Food safety and quality

Agricultural Business Specific Risks

- The design of the packing facility
- The suitability and reliability of packhouse equipment and machinery
- The adoption of the recommended processes, systems and procedures
- The responsible use of chemicals

Activity 7 – Group Brainstorm

Hold a brainstorming session regarding the impact of the variable risk types on the local and export market plan of citrus. Discuss and make recommendations on ways to handle the impacts identified in your brainstorming session. Record key notes and the recommendations as a reminder for yourself.

Answers will vary according to learner context, and should incorporate the same elements as discussed in Activity 6. The learner groups should however make recommendations on how to incorporate risks and minimise impacts as part of the rolling marketing plan, by listing practical tasks and examples from their own context.

It should include action plans and methodologies surrounding:

1. Information gathering and interpretation
2. Sources of information and research
 - Production estimates
 - Historical figures on volumes and average prices in different markets
 - Market access status, particularly for phytosanitary markets
 - Historical volumes shipped by local exporters and international competitors
 - Planting and production trends
 - Benchmark production, packing and freight costs
3. Logistical planning and mode of selling
4. Forward exchange cover
5. Strategies to establish linkages with selected individuals and organisations so as to build sources of information for decision-making

Activity 8 – Worksheet

Complete the worksheet below on your own.

Define the following concepts in your own words:	
Strategic Intelligence Process	The strategic intelligence process provides a means by which policy makers can be put in a position to make sound strategic decisions. The process begins with the identification of the kind of information that will be necessary to inform a particular strategic decision. Thereafter, potential sources of the required data are identified, data is collected, analysed, evaluated, and transformed into useful information, and this is then used to inform policy makers.
Critical Success Factors	This is a business term for an element which is vital for an organisation or project to achieve its mission.
Proactive Risk Management	This is a process whereby a company or project assesses the risks attached to a strategy or action before the action is implemented so that the identified risks can be managed in a sound and cost-effective way

Forward Exchange Cover	This is a method of reducing risk attached to fluctuations in currency values. It is a type of foreign exchange transaction whereby a contract is made to exchange one currency for another at a fixed date in the future at a specified exchange rate. By buying or selling exchange 'forward', the grower or exporter can protect themselves against a decrease in the value of a currency they plan to sell at a future date.
Linkages	A linkage is a connection or relation between things, ideas, people or companies. In business, managers look to create linkages to access information, or to share risk.
Outsourcing	Outsourcing generally means contracting out a business function to an external service provider. This allows management to employ expertise in a planning process without building expensive internal capacity.

Activity 9 – Analysis and Recommendations

Obtain a copy of the current marketing plan for your organisation. Analyse each of the components listed in the table below

Timeframes for Each Component of the Plan

<u>Strengths</u> Answers will vary according to learner context	<u>Weaknesses</u> Answers will vary according to learner context
<u>Opportunities</u> Answers will vary according to learner context	<u>Threats</u> Answers will vary according to learner context
Recommendations for remedial actions and improvements:	
Answers will vary according to learner context	

Action Plan Implementation and Follow Through

<u>Strengths</u> Answers will vary according to learner context	<u>Weaknesses</u> Answers will vary according to learner context
<u>Opportunities</u> Answers will vary according to learner context	<u>Threats</u> Answers will vary according to learner context
Recommendations for remedial actions and improvements:	
Answers will vary according to learner context	

Budgeted versus Actual Spending

<u>Strengths</u> Answers will vary according to learner context	<u>Weaknesses</u> Answers will vary according to learner context
<u>Opportunities</u> Answers will vary according to learner context	<u>Threats</u> Answers will vary according to learner context
Recommendations for remedial actions and improvements:	
Answers will vary according to learner context	

Monitoring Actions Related to Budget Improvements

<u>Strengths</u> Answers will vary according to learner context	<u>Weaknesses</u> Answers will vary according to learner context
<u>Opportunities</u> Answers will vary according to learner context	<u>Threats</u> Answers will vary according to learner context
Recommendations for remedial actions and improvements:	

Answers will vary according to learner context	
Human Resource Allocation, including Monitoring of External Outsourced Human Resources	
<u>Strengths</u> Answers will vary according to learner context	<u>Weaknesses</u> Answers will vary according to learner context
<u>Opportunities</u> Answers will vary according to learner context	<u>Threats</u> Answers will vary according to learner context
Recommendations for remedial actions and improvements:	
Answers will vary according to learner context	



Marking Matrix and Assessor Report for Formative Assessment Activities
Formative Evidence Collection Summary for Unit Standard 116684 – Level 4

	<i>Action Required from Learner to Develop Competence</i>	<i>Competence Assessments</i>	<i>Standard for Activity</i>	<i>Allocation of Marks</i>	<i>Feedback to Learner and Comments on Evidence</i>
<i>Specific Outcome 1: Structure a marketing plan using a systems approach</i> <i>Range:</i> Apply to a total marketing value chain for a specific agricultural commodity	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	
<i>Specific Outcome 2: Structure a rolling marketing plan for a specific agricultural commodity</i> <i>Range:</i> Market places, positioning, pricing, packaging, promotion, logistics and distribution; short, medium and long term plans; periodical adjustments	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	
<i>Specific Outcome 3: Structure a risk plan to accommodate variables and uncertainties in a marketing plan for a specific agricultural commodity</i> <i>Range:</i> Uncontrollable, controllable agricultural risks, agricultural business specific risks	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	

Marking Matrix and Assessor Report for Formative Assessment Activities
Formative Evidence Collection Summary for Unit Standard 116684 – Level 4

	<i>Action Required from Learner to Develop Competence</i>	<i>Competence Assessments</i>	<i>Standard for Activity</i>	<i>Allocation of Marks</i>	<i>Feedback to Learner and Comments on Evidence</i>
Specific Outcome 4: Monitor the marketing plan and apply remedial actions <i>Range:</i> Budget application, personnel allocation, marketing audit and adapted time frames	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	
US CCFO: 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	
US CCFO: Working					
US CCFO: Organising					
US CCFO: Communicating					
US CCFO: Science					
US CCFO: Demonstrating					
US CCFO: Contributing					
US CCFO: Identifying					

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



Step 6

Draft a Marketing Plan

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. Mark both the written evidence and also show proof of being verbally presented with the evidence required.

- 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 report:

Unit Standard:	116684	NQF Level:	4
Learner Name			

- Use the questions below as a marking matrix to gather evidence and to check for completeness.

1. Draft a framework for your marketing plan according to the following criteria:	25%
• Choice of market and profile of consumer	
• Market places	
• Market positioning	
• Pricing	
• Packaging	
• Promotion	
• Logistics and distribution	
• Short, medium and long term plans	
• Monitoring and periodical adjustments	

2. Research the following areas prior to the compilation of your plan:	20%
The selection and interpretation of local and export market opportunities for citrus in general and your citrus type specifically	
Identification and analysis of the critical success factors in the local and export marketing value and supply chain and support services for citrus in general and your citrus type specifically	
3. Identify and assess of the following areas of the marketing mix:	30%
Product positioning of citrus in general and your citrus type specifically	
Pricing of citrus in general and your citrus type specifically	
Packaging of citrus products in general and your citrus type specifically	
Freight logistics in the citrus industry and for your area of production specifically	
Promotion strategies for selected local and / or export markets for citrus in general and for your citrus type specifically	
The structuring of the marketing plan over a period of at least three financial years, indicating short-, medium- and long term marketing goals and action plans	
4. Take the following key areas of marketing into account and attach detailed reports to your plan explaining how you utilised and / or applied the tools and concepts related to each key area:	25%
Marketing plans, expanded to include up to long term marketing strategies	
Systems thinking	
Risk analysis	
Local and international markets	
Marketing mix	
Marketing audit	
Remedial actions within marketing plans	
Communication of marketing action plans and timeframes	

Step 7

Integrated Summative Assessment Tool

One assessment tool is provided in this step, being the 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 this tool in preparation for summative assessment. This corresponding step in the Learner Assessment Guide is a direct reflection of this tool and is drafted in a format that is appropriate to the learner's level of language competence.

- 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:

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

- 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:

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: ☐ Competent ☐ Not yet competent in this unit standard	Actions to follow: ☐ Assessor report to ETQA ☐ 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	116684		
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 Report and Summative Evidence Collection Summary for Unit Standard 116684 – Level 4

Description	Evidence Gathered		Benchmark	Competent / Not yet Competent	Feedback and Comments
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
Specific Outcome 1: Structure a marketing plan using a systems approach <i>Range:</i> Apply to a total marketing value chain for a specific agricultural commodity	Summative Marketing plan	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 2: Structure a rolling marketing plan for a specific agricultural commodity <i>Range:</i> Market places, positioning, pricing, packaging, promotion, logistics and distribution; short, medium and long term plans; periodical adjustments	Summative Marketing plan	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 3: Structure a risk plan to accommodate variables and uncertainties in a marketing plan for a specific agricultural commodity <i>Range:</i> Uncontrollable, controllable agricultural risks, agricultural business specific risks	Summative Marketing plan	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 4: Monitor the marketing plan and apply remedial actions <i>Range:</i> Budget application, personnel allocation, marketing audit and adapted time frames	Summative Marketing plan	CCFO Rating Scale	85% competence in all areas		

Assessor Report and Summative Evidence Collection Summary for Unit Standard 116684 – Level 4

<i>Description</i>	<i>Evidence Gathered</i>		<i>Benchmark</i>	<i>Competent / Not yet Competent</i>	<i>Feedback and Comments</i>
	<i>Foundational and Embedded Knowledge</i>	<i>Practical Skills, Underpinning Knowledge and Reflexive Competence</i>			
<i>Embedded Knowledge:</i> The learner is able to demonstrate a basic knowledge of: 1. Marketing plans, expanded to include up to long term marketing strategies 2. Systems thinking 3. Risk analysis 4. Local and international markets 5. Marketing mix 6. Marketing audit 7. Remedial actions within marketing plans 8. Communication of marketing action plans and timeframes			Overall minimum test score of 85%		
<i>Unit Standard CCFOs:</i> • Identifying • Working in a Team • Organising • Communication • Demonstrating • Contributing • Science • Collecting	N/a	Rating Scale	Minimum rating of 3:5 in each criteria or overall average of 3:5		

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.

