

ASSESSMENT GUIDE FOR LEARNERS & LEARNER WORKBOOK

Marketing

Level 4

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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
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Based on the Production Guidelines of:



Supported by:



Unit standard alignment and assessment tool development:

Cabeton Training and Development

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Directions

This material is aimed at learners wishing to complete this unit standard. The 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 is designed to be used by the learner with guidance from a facilitator and a trained assessor to develop competence in all knowledge, skills and attitudes required by this unit standard.

This guide contains step-by-step instructions for the assessment process. These 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	Learning Assumed to Be in Place	Before delivery of program
4	Learner Assessment Plan for Gathering of Evidence	Before delivery of program
5	Assessment Activity Workbook	During delivery of program, assessment after delivery of program
6	Draft a Marketing Plan	After delivery of program
7	Attitudes and Attributes Assessment	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

Learner Assessment Contract

The assessor and / or the facilitator holds a pre-assessment briefing with you before the learning program starts in order to guide you and assist you to make sure that you understand exactly what is expected from you in order to become competent in this learning module.

As part of the pre-assessment briefing, the learner assessment contract must be signed. The assessor will assist you and explain the agreement to you in detail.

Learner Assessment Contract	
Learner's Name:	
Assessor's Name:	
Unit Standard:	116684
Your rights as a learner are: 1. You have a right to appeal against any judgment given as a result of any assessment. You must have valid reasons for doing this. 2. You have the right to an interpreter if you need one. However, if one of the learning assumptions for the unit standard is that you are competent within the language of assessment, you may not have an interpreter. 3. You can ask that an impartial observer attend any assessment. This observer may not take any part in the assessment. 4. If you do not agree with the assessment, you have the right to have your assessment internally moderated. If you still do not agree with the result of the assessment you can ask that the ETQA to perform an external moderation on the assessment. If any verification upholds the assessment findings, you will be held liable for all the costs of the verification. If any verification rules that you have been aggrieved as a result of the assessment, your assessor will be held liable for all cost of verification. 5. If during the assessment you are found not yet competent, your assessor will encourage you to master the areas where you have not reached competency. This will be recorded on a development plan. You are required to arrange with the assessor for a new assessment schedule. The assessor can only permit three such re-assessments. If a learner has not reached mastery after three additional attempts, the assessor reserves the right to remove you from the program.	
<u>Qualification</u> This standard leads to the award of credits for unit standard 116684. Once the assessment is complete application will be made to register and certify you for that standard with the AgriSETA. You may contact the assessor or facilitator at any time for information to assist you with further studies.	
<u>Confidentiality</u> Each assessment application, the outcomes, results and reviews will be treated as a confidential matter by you, the learner, the facilitator(s), assessor(s), and moderator(s). No references will be made to anyone or any organisation outside the SETA about the status of an application during the assessment process.	

Consent

I, the learner, hereby state that I have read the above and understood the contents thereof. I was given the opportunity to clarify any issues relating to the assessment process and my assessment plan. I have requested this assessment of my own free will and without duress.

Learner's Signature		Date:	
Assessor's Signature		Date:	



Step 2

Learner Declaration of Authenticity

It is important that we make sure that each learner supplies original evidence completed by himself / herself and according to the level of knowledge and skill that he / she has acquired from the learning process.

Please sign the following declaration:

I hereby declare that the following documentary evidence is my own. I certify that the process followed was ethical and did not infringe on the copyright of any individual or organisation.			
Learner's Signature		Date:	
Assessor's Signature		Date:	



Step 3

Learning Assumed to Be in Place

Do you have all the knowledge and skills necessary to begin this learning process?

This is a level 4 module of learning, and we have to make sure that you have already learnt all the skills, knowledge and attitudes that you will need to use in this module. It will help you to understand and learn more easily in this module, and it is important that we know whether you are ready to move on.

Please look at the list of unit standards below of modules that you should have completed before undertaking this one. Tell us whether you have completed each of the unit standards or modules, and if you did, tell us when you learnt this.

If you need help in understanding this list, please ask the facilitator or assessor.

<i>NQF Level</i>	<i>Unit Standard Number</i>	<i>Learning Module Name</i>	<i>No, I Have Not Completed It</i>	<i>Yes, I Have Completed It</i>	<i>If Yes, When Did You Complete It?</i>
NQF3	Literacy and Numeracy				
3	116259	Explain the application of marketing principles within an alternative and dynamic agricultural marketing environment			
Learner's Signature			Date:		
Assessor's Signature			Date:		

Step 4

Learner Assessment Plan for Gathering of Evidence

As the assessor has explained to you, the aim of an assessment is not to catch you out, but rather to help you develop all the skills, knowledge and attitudes that you need to move forward. It is important that you know what is expected from you and that you play an active role every step of the way.

Let us plan for the assessment together. Below are the steps that you have to work through in order to show that you are competent in this module. Check them carefully and discuss each step with the assessor. Agree with the assessor on the dates on which each step has to be completed or documents handed in. Write the dates in the right-hand column as a reminder.

Learner Assessment Plan		
Module / Unit Standard Name:	Participate in the development and management of an agricultural marketing plan	
Module / Unit Standard Registration Number:	116684	
<i>Step Number</i>	<i>Step Description and Learner's Tasks</i>	<i>Completion / Submission Date</i>
5	Assessment Activity Workbook - In this step, you complete certain tasks in class or as homework. - It is important that you complete every task and understand why it is necessary, because it will help you to gain the knowledge, skills and attitudes that you need to be found competent in this learning module. - If there are things that you are unsure about, please ask the facilitator or the assessor to explain it to you again. - You hand in the completed workbook to the facilitator or assessor who will help you to check your progress. - The assessor or facilitator mark it and discuss areas that need more work with you.	
6	Draft a Marketing Plan - There are many important things that you need to remember about marketing in order to be found competent in this learning module, and so that you can do your job well and move on to level five. - You have to take into account all the facts and factors that you have learnt, and draft a detailed rolling marketing plan for your organisation as related to the marketing of a specific citrus type from your farm in order to be found competent. - There is a detailed list of things that you need to know in this guide and examples of the types of information that you will have to relay in your marketing plan. - Please prepare yourself well and remember to ask the facilitator or assessor to explain anything that you don't understand.	

7	Attitudes and Attributes Assessment - You have to develop very specific character traits and attitudes and have to be able to do very specific tasks to be competent in this learning module, be good in this job, and to be able to move on to level five. - Going out into the field, and showing and explaining certain skills and attitudes, is the most appropriate way for you to show that you are competent in the skills and attitudes that are needed. - You will have an opportunity to practice these tasks and develop these attitudes during your practical learning module. - There is a list of all the things that you would have to be able to show and explain in this guide. - Please prepare yourself well and remember to ask the facilitator or assessor to explain anything that you don't understand.		
8	Re-Assessment Procedure - What if the assessor tells you that you have not met the right standard or that you still need more evidence to prove your competence? - The assessor explains to you exactly what you need to do or learn to become competent. - You and the assessor and / or facilitator, develop an action plan together, and you may be granted a second or even a third opportunity to prove your competence. - Remember you have the right to appeal against the assessor's decision, if you feel it is unfair. There is a copy of the form in the back of this guide if you need it.		
9	Paperwork - If you have met the standard that is explained for each step of the process you will be found competent in this unit standard. - The assessor will discuss everything with you in detail and will ask you to fill in and sign forms throughout the process. - You will also be given an opportunity to write down any comments you might have on the assessment process. - Once the assessor has given you the final declaration of competence, you will be asked to give some feedback in order to help everyone to improve the learning and assessment process. - Please think carefully. It might really help other learners in the future.		
10	Administration and Completion of Portfolio of Evidence All the documents, or copies of them, must be kept on file as part of your portfolio of evidence.		
Into the Future - The assessor will discuss what happens next and when you will get a certificate of competence. - It is also important to remember that you learnt this module for a specific reason. Discuss with the assessor, facilitator, mentor, and / or coach how you can move forward in your career with this level of competence. - Also remember that the learning process never stops. Plan together with the assessor, facilitator, coach, and / or mentor what you need to learn next.			
Learner's Signature		Date:	
Assessor's Signature		Date:	

Step 5

Assessment Activity Workbook

- The activities that follow are designed to help you gain the skills, knowledge and attitudes that you need in order to become competent in this learning module.
- It is important that you complete all the activities and worksheets, as directed in the learner guide and at the time indicated by the facilitator.
- It is important that you ask questions and participate as much as possible in order to play an active role in reaching competence.
- When you have completed all the activities and worksheets, hand this workbook in to the assessor who will mark it and guide you in areas where additional learning might be required.
- You should not move on to the next step in the assessment process until this step is completed, marked, and you have received feedback from the assessor.

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.





[illegible]

[illegible]

academy

[illegible]

Activity 8 – Worksheet

Complete the worksheet below on your own.

Define the following concepts in your own words:	
Strategic Intelligence Process	
Critical Success Factors	
Proactive Risk Management	
Forward Exchange Cover	
Linkages	
Outsourcing	

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>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>

Recommendations for remedial actions and improvements:

Action Plan Implementation and Follow Through

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations for remedial actions and improvements:	

Budgeted versus Actual Spending

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>

Recommendations for remedial actions and improvements:

Monitoring Actions Related to Budget Improvements

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations for remedial actions and improvements:	

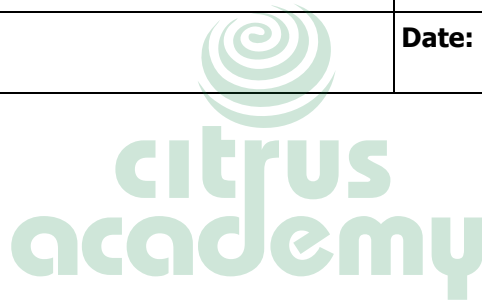
Human Resource Allocation, including Monitoring of External Outsourced Human Resources

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>

Recommendations for remedial actions and improvements:



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

You are now ready for step six of the assessment process, the drafting of a detailed rolling marketing plan for a specific citrus type, such as valencias or soft citrus or lemons, that is produced on your farm. Check your plan carefully to make sure that you prepare in good time.

You have to score an overall mark of at least 85% in this task in order to be found competent.

Inform the assessor if you have any special needs or requirements **before** the agreed date for the hand in of the assessment task. You might, for example, require an interpreter to translate the questions to your mother tongue. Please write your request down in your activity workbook on the front page and explain why you have made this request. Ask the assessor to sign next to your request to prove that they are aware of your special request.

Use this checklist to help you plan and prepare for the writing of the plan. These are examples of possible questions that will help you to organise and plan your task. All the information you need was taught in the classroom and can be found in the learner guide that you received.

Draft a rolling marketing plan for one of the citrus types or cultivars that is produced on your farm. Present this marketing plan to the assessor, your mentor and members of the management team from your farm as a multimedia presentation with a detailed written plan distributed to all for analysis.

<i>Example Questions</i>	<i>I Have Revised This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain It Again</i>
1. Draft a framework for your marketing plan according to the following criteria:		
• 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:		
• The selection and interpretation of local and export market opportunities for citrus in general and your citrus type specifically		

<i>Example Questions</i>	<i>I Have Revised This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain It Again</i>
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:		
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:		
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		

The assessor or facilitator has explained this step to me and I have revised these questions.

Learner's Signature		Date:	
Assessor's Signature		Date:	

The assessor will give you feedback on the test and guide you if there are areas in which you still need further development.

Step 7

Attitudes and Attributes Assessment

You are now ready for step seven of the assessment process, the attitude and attribute assessment. Check your plan carefully to make sure that you prepare in good time.

Inform the assessor if you have any special needs or requirements before the agreed date for the assessment. You might, for example, require an interpreter to translate the questions to your mother tongue, or you might need to take this assessment orally. Please write your request down in your activity workbook on the front page and explain why you have made this request. Ask the assessor to sign next to your request to prove that they are aware of your special request.

Use the checklist below to help you prepare for when you are observed on the attitudes and attributes that you need to have to be found competent for this learning module.

<i>Observations</i>	<i>I Am Sure of This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain What It Means</i>
Can you identify problems and deficiencies correctly?		
Are you able to work well in a team?		
Do you work in an organised and systematic way while performing all tasks and tests?		
Are you able to collect the correct and appropriate information and / or samples as per the instructions and procedures that you were taught?		
Are you able to communicate your knowledge orally and in writing, in such a way that you show what knowledge you have gained?		
Can you base your tasks and answers on scientific knowledge that you have learnt?		
Are you able to show and perform the tasks required correctly?		
Are you able to link the knowledge, skills and attitudes that you have learnt in this module of learning to specific duties in your job or in the community where you live?		

- The assessor will complete a checklist that gives details of the points that are checked and assessed by the assessor.
- The assessor will write commentary and feedback on that checklist. They will discuss all commentary and feedback with you.
- You will be asked to give your own feedback and to sign this document.
- It will be placed together with this completed guide in a file as part of your portfolio of evidence.

Step 8

Re-Assessment Procedure

The assessor will discuss in detail with you what to do in case you require a re-assessment, and when the re-assessment will take place.



Step 9

Paperwork

Please assist the assessor by filling in these forms and signing then as instructed.

Learner Information Form			
Unit Standard	116684		
Program Date(s)			
Assessment Date(s)			
Surname			
First Name			
Learner ID / SETA Registration Number			
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

<i>Description</i>	<i>Evidence Gathered</i>		<i>Benchmark</i>	<i>Competent / Not yet Competent</i>	<i>Feedback and Comments</i>
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
<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 all lectures Complete workbook as per instruction	Summative marketing plan Observation checklist of attitudes and attributes.	85% competence in all areas		
<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 all lectures Complete workbook as per instruction	Summative marketing plan			
<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 all lectures Complete workbook as per instruction	Observation checklist of attitudes and attributes.	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>
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
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 all lectures Complete workbook as per instruction	Summative marketing plan	85% competence in all areas		
Embedded Knowledge: 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	Attend all lectures Complete workbook as per instruction	N/a	Overall minimum test score of 85%		

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

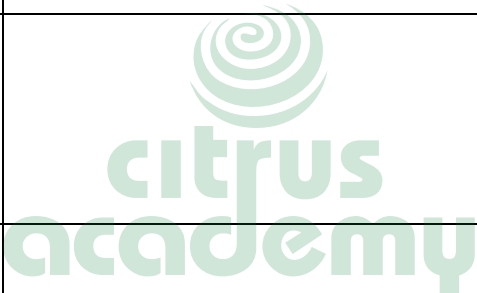
<i>Description</i>	<i>Evidence Gathered</i>		<i>Benchmark</i>	<i>Competent / Not yet Competent</i>	<i>Feedback and Comments</i>
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
Unit Standard CCFOs: 1. Problem solving relates to all specific outcomes 2. Teamwork relates to all specific outcomes 3. Self-organisation and management relates to all specific outcomes 4. Information evaluation relates to all specific outcomes 5. Communication relates to all specific outcomes 6. Use science and technology relates to all specific outcomes 7. Inter-relatedness of system relates to all specific outcomes 8. Self-development relates to all specific outcomes	N/a	Rating Scale	Minimum rating of 3:5 in each criteria or overall average of 3:5		

Learner Assessment Re-Actionnaire			
Questions		Response	
How did the assessor encourage you to be involved in the assessment process?			
Did the assessor take your special needs into account? If so, how?			
Did the assessor agree on the assessment procedures with you?			
Was feedback relevant to your needs?			
Were you always aware of the outcome of the assessment?			
Did the assessor help you to explore ways of becoming competent whenever you were judged NYC?			
Did the assessor allow you to ask questions?			
Did you always agree with assessment decisions?			
Was all appropriate documentation completed and signed and did you receive copies?			
Did the assessor assist or prevent you in any way when gathering evidence so as to obscure its authenticity?			
All the evidence submitted in my name is my authentic work, which was not acquired by any unethical means.			
Learner's Signature		Date:	
Assessor's Signature		Date:	
Moderator's Signature		Date:	

evaluation checklist be	
sufficient to make a	
back from the	
you communicated it, how could this	
assessment process?	

Assessment Appeal Form

Any candidate has the right of appeal against any not-yet-competent decision by the assessor. If you wish to appeal, please 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.

