

ASSESSMENT GUIDE FOR ASSESSORS & FACILITATORS

Marketing

Level 5

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Title:		Integrate Marketing Plans with Business Process					
Applied Title:		Integrate Marketing Plans with Business Process in Citrus Production Enterprise					
Field:		Business, Commerce and Management Studies					
Sub-Field:		Marketing					
SETA (SGB):		Marketing					
Skills Area:		Marketing					
Context:		Citrus Production					
US No:	10050	Level:	5	Credits:	6	Notional Hours:	60
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Based on the Production Guidelines of:



Supported by:



Unit standard alignment and assessment tool development:

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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:	10050	Level:	5	Credits:	6
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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:

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	Road Show Multimedia 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	Participate in the development and management of an agricultural marketing plan	
Registration Number	10050	
<i>Step</i>	<i>Description</i>	<i>Completion / Submission Date</i>
Step 5	Learner Formative Assessment Activities	
Step 6	Road Show Multimedia 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, where possible.

Activity 1 – Experiential Research and Analytical Report

While working in the marketing environment of an organisation involved with the marketing of citrus produce, do experiential research and draft a detailed analytical report on the following factors:

- External environmental factors and its impact upon the marketing activities related to citrus.
- Internal influences on the marketing organisation and their impact upon the marketing activities related to citrus.

The marketing activities to take into account for your report should include:

- All forms of marketing communications
- Direct marketing and relationship marketing
- Sponsorships
- Event marketing
- Sales promotions
- Public relations
- Possible alternative marketing strategies

Some of the broad factors influencing consumer behaviour to take into account might include:

- Psychological factors (needs, perception, learning, attitudes and personalities)
- Social factors (family, social class, reference groups, opinion leaders and culture)

Attach the report to your portfolio of evidence.

Answers will vary according to learner context.

Activity 2 – Group Discussion

Hold a group discussion on the following topic:

"Marketing research and marketing information systems play an important role in investigating and understanding operations of the market place."

Mind map for each function listed below, focussing on the importance and distinguishing characteristics of each element.

1. Information systems used for collating, processing, analysing and producing marketing information are identified.
2. The need for quality information in making marketing decisions and developing marketing.
3. Research functions for establishing and maintaining markets are identified and are sensitive to cultural and ethnic differences.

Answers will vary according to learner context, but must be presented in the form of mind maps.

Activity 3 – SWOT Analysis

For each of the following potential citrus markets, complete a SWOT analysis and make recommendations with regard to the factors that are listed.

Answers will vary according to market statistics and timeframe in which the activity is conducted. Learners and assessors should consult the most up to date publication of Key Industry Statistics, as published by the Citrus Growers Association.

Export Market

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Formal Domestic Market

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

Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Informal Domestic Market

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Alternative Markets

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	

Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	
Non-Profit Markets	
<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Activity 4 – Research Report

Compile two market research questionnaires in order to identify the influences on consumer behaviour of the typical consumers in any two of the following market segments:

- Export market, USA
- Export market, Asia
- Export market, Europe
- Formal domestic market
- Informal domestic market

The market research questionnaires should include dimensional questions related to factors that affect consumer behaviour, including cultural, social and psychological factors, individual family values and group norms.

As an annexure to your report, include blank versions of the two market research questionnaires with key notes in the margins of each, explaining your reasons for including or excluding the questions.

Complete a representative market research exercise targeting at least 25 people that are representative of the market chosen. The research may be completed telephonically, in person or electronically, but may NOT be anonymous, meaning that all your focus participants must be contactable. Include the original questionnaires as an annexure to your report.

Analyse the data that you gathered and write up a report and recommendations detailing the following information:

1. The comparative market segments targeted for research
2. Methodologies applied
3. Statistical information and findings

4. Summarise conclusions regarding broad factors which influence consumer decisions in general and for each of the market segments targeted specifically.
5. Discuss specific findings and conclusions surrounding factors that affect consumer behaviour for each of the market segments targeted, including:
 - 5.1. Cultural
 - 5.2. Social
 - 5.3. Psychological
 - 5.4. Individual family values
 - 5.5. Group norms
6. Draw a conclusion and make recommendations on how marketing strategies for the Citrus sector should be influenced by your market research findings.

Report will be in accordance with market selection and learner context.



Marking Matrix and Assessor Report for Formative Assessment Activities
Formative Evidence Collection Summary for Unit Standard 10050 – Level 5

	<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 1: Monitor the marketing environment and determine variables for marketing activities	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	
Specific Outcome 2: Distinguish the role of marketing research and marketing information systems	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	
Specific Outcome 3: Distinguish characteristics of major markets	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>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: Identify influences on consumer behaviour in relation to marketing activities	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

Road Show Multimedia 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:

Unit Standard:	10050	NQF Level:	5
Learner Name			

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

Monitoring the marketing environment and determining variables for marketing activities	
The marketing activities to take into account for your enterprise should include:	20%
• All forms of marketing communications	
• Direct marketing and relationship marketing	
• Sponsorships	
• Event marketing	
• Sales promotions	
• Public relations	
• Possible alternative marketing strategies	
Some of the broad factors influencing consumer behaviour to take into account might include:	20%

- Psychological factors (needs, perception, learning, attitudes and personalities) - Social factors (family, social class, reference groups, opinion leaders and culture).	
Distinguishing the role of marketing research and marketing information systems in investigating and understanding the operations of the market place	
The importance and distinguishing characteristics that each element and its role listed below:	20%
- Information systems used for collating, processing, analysing and producing marketing information are identified. - The need for quality information in making marketing decisions and developing marketing. - Research functions for establishing and maintaining markets are identified and are sensitive to cultural and ethnic differences.	
Distinguishing characteristics of major markets	
SWOT analyses of:	20%
- Export market - Formal domestic market - Informal domestic market - Alternative markets - Non-profit markets	
Criteria for explanations and recommendations:	
- Dimensions of the market - Features of the typical consumer - Features of the non-consumer and reasons for their lack of consumption - Competitive products and features compared to our own product - Current and future services related to our product - Meeting the specific needs of different ethnic and indigenous consumers, societies and end-users	20%

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	10050		
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 10050 – Level 5					
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: Monitor the marketing environment and determine variables for marketing activities	Summative Road Show presentation	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 2: Distinguish the role of marketing research and marketing information systems	Summative Road Show presentation	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 3: Distinguish characteristics of major markets	Summative Road Show presentation	CCFO Rating Scale	85% competence in all areas		
Specific Outcome 4: Identify influences on consumer behaviour in relation to marketing activities	Summative Road Show presentation	CCFO Rating Scale	85% competence in all areas		
Embedded Knowledge: The learner is able to demonstrate a basic knowledge of: 1. A general overview of the organisation's overall business strategies. 2. A basic understanding of the organisations marketing and communications strategies and plans. 3. A general and broad understanding of the elements of the marketing mix and marketing mix components.			Overall minimum test score of 85%		

Assessor Report and Summative Evidence Collection Summary for Unit Standard 10050 – Level 5

<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>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.

