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Citrus Orchard Foreman Occupational Learning

Work Scenario Guide

A4: Performance Monitoring and Improvement

Qualification:	110667 – Occupational Certificate: Orchard and Vineyard Foreman
Work Scenario:	A4: Performance Monitoring and Improvement
Learning Area:	A: Take part in the business management of the farming operation
Scenario Description:	Once you have gathered data on operations, you may need to take action to improve production practices and performance in areas where they are lacking or not meeting targets.

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Alignment Information

Qualification

The content of this learner guide is aligned to the following occupational qualification:

SAQA QUAL ID	Qualification Title			
110667	Occupational Certificate: Orchard and Vineyard Foreman			
Originator				
Development Quality Partner – AgriSETA				
Primary Or Delegated Quality Assurance Functionary			NQF Sub-Framework	
-			OQSF - Occupational Qualifications Sub-Framework	
QUALIFICATION TYPE		FIELD		SUBFIELD
Occupational Certificate		Field 01 - Agriculture and Nature Conservation		Primary Agriculture
Abet Band	Minimum Credits	Pre-2009 NQF Level	NQF Level	Qual Class
Undefined	147	Not Applicable	NQF Level 04	Regular-ELOAC

Modules

The content of this learner guide is aligned to the following modules of the occupational qualification above.

Module Code	Module Title	Level	Credits
Knowledge Modules			
611202-001-00-KM-01	Plant Structure and Physiology	4	5
611202-001-00-KM-02	Vineyard or Orchard Establishment	3	2
611202-001-00-KM-03	Vineyard or Orchard Manipulation Processes	3	8
611202-001-00-KM-04	Harvesting	3	4
611202-001-00-KM-05	Basic Principles of Plant Nutrition	4	4
611202-001-00-KM-06	Crop Protection	3	3
611202-001-00-KM-07	Assets in Horticultural Production	3	2
611202-001-00-KM-08	Farm Business Management and Farming Process Management	4	8
611202-001-00-KM-09	Human Resource Management and Processes	4	8
611202-001-00-KM-10	Overseeing Farming Resource Utilisation	4	8
Practical Skill Modules			
611202-001-00-PM-01	Organise, Allocate and Monitor Availability and Productive Use of Resources	4	5
611202-001-00-PM-2a	Set Team and Individual Performance Goals to Enhancing Team Performance	4	10
611202-001-00-PM-2b	Control Vineyard or Orchard Practices	4	10

611202-001-00-PM-03	Supply Accurate Daily Orchard or Vineyard and Production Information	4	10
Work Experience Modules			
611202-001-00-WM-01	Vineyard or Orchard Resource Optimisation	4	20
611202-001-00-WM-02	Skilled and Motivated Work Team Output	4	20
611202-001-00-WM-03	Daily Orchard or Vineyard and Production Information Availability	4	20

Learning Outcomes

The content of this learner guide is aligned to the following learning outcomes of the modules above.

Knowledge Topics	
Outcome Code	Module Title
KM-08-KT05	Farm management information systems
IAC0503	Historical information on orchard production and environmental conditions and the uses thereof are discussed
IAC0505	Internal and external records and reporting structures are identified and discussed
IAC0507	The collection and recordkeeping of agricultural data is described and motivated
KM-09-KT03	Overseeing horticultural farming operations
IAC0309	Production optimization techniques are discussed
IAC0312	The types of monitoring are listed and their applicability assessed
IAC0313	The concepts and principles of monitoring are discussed
IAC0314	The role of monitoring in achieving output and quality norms and standards is explained
KM-10-KT05	Quality management
IAC0504	Sampling principles and methods are described
IAC0505	The importance of the application of laboratory results is explained
IAC0506	Factors influencing the quality of fruit are defined
Practical Skills	
PM-01-PS01	Perform a practical exercise to compile a production plan for an orchard or vineyard for a full growth cycle based on case study information
PA0106	Identify the control mechanisms to ensure output and quality targets are met.
PA0107	Identify the steps for evaluation of the production process.
AK0106	Techniques for continuous improvement
PM-01-PS02	Determine agricultural input to support the production activities of the orchard related to the production stages of the crop
AK0206	Techniques for continuous improvement
PM-01-PS03	Organise and allocate equipment and agri-chemicals to the work team to perform Vineyard or orchard practices
AK0305	Techniques to exercise cost control
AK0306	Techniques for continuous improvement
PM-2b-PS01	Conduct a practical exercise to control and evaluate the agricultural practices in a Vineyard or orchard based on case study information
PA0101	Practically obtain relevant information from a production unit and observe technical activities of the work team

PA0104	Document a minimum of five what-if scenarios, and apply problem-solving and decision-making skills to come up with recommended courses of action
PA0107	Practically compare the quality and quantity of the practices of different teams and individuals to determine compliance with (farm, operation and cultivar) standards and identify actions to support the individual/team who do not meet the set standards
PA0111	Apply the technical requirements for the production operation
PM-03-PS02	Perform a practical exercise to report on Vineyard or orchard and production progress based on case study information
IAC0201	The report is correctly compiled
IAC0202	The presentation is given covering all the relevant information
IAC0203	The deviations and incidents are identified and explained
PA0201	Interpret the information
PA0202	Identify deviations and incidents
PA0203	Analyse the progress
PA0204	Compile a report with suggestions of corrective actions
PA0205	Explain and discuss the report
PA0206	Interpret and understand charts, statistics and graphs
PA0207	Calculate the average

Chapter 1

Performance Monitoring

learning outcomes

The content of this chapter is aimed at helping you to:

- Monitor and manage the performance of all employees at all levels.

1. Performance Monitoring and Management

As you know, a citrus farm can be a very complex, large operation. Sometimes a single farm can employ dozens if not more than 100 people throughout a year, and it is important that all of these employees are well-managed and that they are doing their jobs properly. The best way to ensure that they are doing their jobs is to effectively and closely monitor and manage their performance.

Performance management is the process of assessing how well your employees are working, and giving the feedback required to improve their performance if necessary. This is vital to ensure that the farm achieves its short-term and long-term goals and objectives. This is achieved by measuring performance at various levels in various ways.

2. Performance Management Levels

Performance management is required at all levels of your organisation, so that there are no 'weak links' in your workforce and everyone is on the same page in terms of what is important to the farm and the business. Imagine the farm as a multi-person rowboat, with all employees, from managers to foremen to pickers, acting as the rowers. If the team of rowers can't agree on which direction to row the boat and find a rhythm together so that their oars are entering and leaving the water at the same time, then the boat isn't likely to get very far very fast. The same is true at the farm. If all employees are not working together towards the same goals, you are all far less likely to achieve these goals.

Performance management is generally addressed at the following levels:

- Farm
- Department/Function
- Team
- Individual

The farm level refers to all the activities and routines that are required to ensure that the farm achieves its goals, executes its strategies, and achieves the results that the business requires. You can think of this as the 'big-picture' level.

The department or function level refers to all the activities and routines that are needed to ensure that each farm department and function of the farm (like the Operations, Maintenance, HR, Safety, Irrigation, Quality, etc.) is contributing appropriately to the farm strategy.

The team level refers to all the activities and routines required to ensure that the teams (such as individual picking teams) in operations and other functions are executing the day-to-day activities required to support the larger farm strategy.

Finally, the individual level refers to the systems and processes (e.g., performance reviews, individual development plans, coaching, training, objective setting, etc.) required to get the best possible performance out of each individual employee.

3. Performance Focus

There are generally two types of farms; those that are performance-focused and those that are activity-focused. In a performance-focused farm, all employees understand how they contribute to the goals and objectives of the business, and they regularly talk about how they can improve their performance on a daily basis.

In an activity-focused farm, many employees do not always understand how they contribute to the business, and their focus is typically completing a set of tasks and getting through the day. Changing mindsets from activity-focused to performance-focused is a fantastic way to get your farm to be as productive as possible, and for everyone to feel that they are contributing to the success.

4. Performance Communication

No matter what performance management system or process you use, the most important part of performance management is your ability as a foreman to communicate about performance. It is a skill that requires honesty and directness on one hand, and the ability to ensure that employees always leave the performance conversation feeling stronger and more empowered on the other.

Even when the feedback is tough, the employee still needs to feel motivated, and certainly not humiliated or diminished. Basic training on how to prepare for and hold effective performance reviews and conversations will help to set the good standard and establish a good performance culture in the business. The modules on communication and team management go further into these topics.

5. Key Performance Indicators

definition

Key Performance Indicators (KPIs)

A key performance indicator (KPI) is a quantifiable measurement of how well an organisation or employee is meeting their performance objectives

In the context of South African citrus farming, KPIs are useful tools for assessing the efficiency and effectiveness of farm operations. They provide measurable values that help you as a foreman track progress towards specific goals, make informed decisions, and identify areas that require improvement. KPIs can be broadly categorized into the following:

- Financial KPIs
- Operational KPIs
- Quality KPIs

Financial KPIs might include measures such as revenue growth, cost per unit of production, and profit margins. These indicators help in understanding the financial health and profitability of the farm. Operational KPIs focus on the efficiency of farm activities, such as the yield per hectare, labour productivity, and the time taken from harvest to market. Quality KPIs, on the other hand, measure the standards of the produce, such as the percentage of fruit meeting export quality standards, incidence of pest and disease, and customer satisfaction levels.

For KPIs to be useful, they need to be SMART. This is an acronym, that stands for the five requirements of useful KPIs, which are that KPIs must be:

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

This means that each KPI should have a clear objective, be quantifiable, be attainable, align with the farm's overall goals, and have a defined timeframe for assessment. For instance, a very important, SMART KPI for a citrus farm would be yield per hectare. Yield per hectare measures the amount of fruit produced per unit area and helps in assessing the effectiveness of farming practices. Monitoring yield variations can indicate potential issues with soil fertility, irrigation, or pest management.

The KPIs must be well aligned and clearly defined so that everyone involved on the farm is aware of what you are all trying to achieve and how you are measuring your success. It is important that these are known at the farm and department level, but it is especially important to have the KPIs well-defined at team level, because it is at the team level where the work actually gets done. If the employees who are improving results and the product are not aligned with the objectives of the farm, then the likelihood of underperforming is high.

6. KPI Cascade

The process for setting the right objectives, KPIs, and targets at all levels of the farm is sometimes referred to as the "KPI Cascade" or the "KPI Flow Down" process. These terms stem from the idea that the process should cascade, like a waterfall, from the farm to the departments and finally to the teams. When done properly, there should be complete alignment of objectives, KPIs, and targets at all levels of the organisation.

Once the farm has aligned objectives, KPIs, and targets at all levels of the organisation, the focus shifts toward putting the right managing processes in place to review performance and intervene where performance is sub-optimal. The nature of these processes will vary by level.

Farm leadership will typically do a detailed monthly review of performance against all strategic objectives, for the purpose of identifying action items to address sub-optimal performance or adjusting the strategic objectives based on changing farm or business conditions.

Department/functional leaders will typically meet daily on a cross-functional basis to review the previous 24 hours performance and take action against significant weaknesses or underperformance; and will meet within their department/function on a weekly basis.

Teams should get together formally at the start of their shift or work-day, for the "shift starter," to review performance over the past 12-24 hours and discuss operational threats and priorities that need to be addressed during their work-day.

7. Benchmarking

A good way to create KPIs and objectives is to benchmark yourself against other high-performing farms in your area. If a farm near you is doing much better than you, in, for example, export pack-out percentages, it is worth it to look at their objectives and performance management strategies and apply them to your farm where you can. Benchmarking helps in identifying gaps and setting realistic improvement targets. This is another reason to maintain a good relationship with other farmers in your area.

8. Performance Issues

When performance issues are identified, you need to find their root cause. Generally, if workers are underperforming, it will be from either a lack of guidance, training, supervision, understanding, or motivation. If you find out what the problem at the root is, you can create more effective solutions than simply shouting at your workers for underperformance without helping them.

Root cause analysis of performance issues is essential for preventing recurrence and ensuring continuous improvement. By thoroughly understanding the causes of performance issues, you can implement targeted interventions that address the root problems. This approach ensures that corrective actions are effective and sustainable, leading to long-term improvements in farm performance, and a happier workforce, who feels heard and respected.

9. Daily Performance Reviews

A daily performance review is a short, routine, team session during which the manager, supervisor, or team leader examines the farm/department/section's performance over the last 24 hours, reflecting on:

- What are we doing well or badly?
- If we are doing things wrong, what can we do to improve?
- What is going (or not going) according to plan?
- If things are not going according to plan, what can we do to improve?
- What are the targets and priorities for the day/shift ahead?

These daily meetings are only effective when done properly and consistently. They should be regular, done at the same time, in the same place and where teams naturally meet up, every day. They should not be overblown or excessively long, usually no more than 15-20 minutes, and can be done relatively informally.

Finally, these meetings must be focused. Have a clear goal of what is to be discussed, what questions to ask, and what solutions there are to problems you may encounter. Remain energetic and positive and try and use the meeting as a chance to get your team excited and ready for the day's work ahead, with clear goals in their minds.

If done well, the daily performance reviews will enable managers and team leaders to learn and connect with their team, while continuously reinforcing standards and best practice. Finally, they will show your workers that you care about them and the quality of their work, and that you are always available for advice, feedback, and assistance.

summary

Chapter 1 – Performance Monitoring

- Performance management is the process of assessing how well your employees are working, and giving the feedback required to improve their performance if necessary.
- Performance management is generally addressed at the farm, department/function, team, and individual level.
- In a performance-focused farm, all employees understand how they contribute to the goals and objectives of the business

- In an activity-focused farm, many employees do not always understand how they contribute to the business, and their focus is typically completing a set of tasks.
- The most important part of performance management is communication.
- A key performance indicator (KPI) is a quantifiable measurement of how well an organisation or employee is meeting their performance objectives.
- KPIs can be broadly categorized as financial, operational, and quality.
- For KPIs to be useful, they need to be Specific, Measurable, Achievable, Relevant and Time-bound.
- The “KPI Cascade” refers to the idea that the process of KPI setting should cascade from the farm to the departments and to the teams.
- A good way to create KPIs and objectives is to benchmark yourself against other high-performing farms in your area.
- A daily performance review is a short, routine, team session during which the manager, supervisor, or team leader examines the farm/department/section’s performance over the last 24 hours
- Daily performance reviews are only effective when done properly and consistently.

assessment activities

- ✓ **Activity P1:** Complete this activity to test your knowledge of performance monitoring.
- ✓ **Activity F1:** Complete this activity to test your knowledge of the entire module.