

# Learning Assessment Guide

## Unit Standard 19020 – Version 2

### Develop performance standards and monitor performance for a logistics operation

#### Level 5 – 6 Credits

<b>Assessment Summary</b>			
<b>Learner to complete</b>			
<b>Learner's name:</b>			
<b>Employer:</b>			
<b>NSN no. (ROL):</b>		<b>DOB:</b>	
<b>Signed:</b>		<b>Date:</b>	
<b>Assessor to complete</b>			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
<b>Assessor's name:</b>		<b>Assessor's No.</b>	
<b>Signed:</b>		<b>Date:</b>	

## Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

The tasks in this assessment are designed to show your assessor that you can:

- Demonstrate knowledge of performance measurement in a logistics context.
- Establish performance standards and monitoring systems for a logistics operation within the context of an organisation's business plan.
- Apply the monitoring systems.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Verification form to be completed by your manager or team leader.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

- 1 This unit standard is for people who manage or supervise work teams.
- 2 Legislation relevant to this unit standard includes but is not limited to:  
Health and Safety in Employment Act 1992.
- 3 Glossary  
*Logistics* refers to the process of managing the movement and deployment of people, and/or the movement and storage of goods and materials, from their source to their destination.  
*A logistics operation* may form part of an organisation's activities or it may constitute a complete organisation.  
*Organisational requirements* are those that are formally documented, and are available for reference in the workplace.
- 4 This unit standard will be assessed on the basis of evidence of demonstrated performance in the workplace.

## Assessment Task One – Element 1

### Introduction

Assessment task one is designed to assess your ability to demonstrate knowledge of performance measurement in a logistics context.

### Instructions

- Answer the supplied questions as fully as you can. These questions can be answered orally or in writing. Discuss your preference with your assessor. If you answer orally your assessor will note your answers on your question sheet.
- Your assessor may wish to ask further questions to clarify your responses or to have you expand on your answers to meet sufficiency requirements.

### The completed assessment for task one will include:

- Answers to questions.
- Assessor's notes where relevant.

### Task One Questions

<b>Name of Learner</b>	
<b>Date</b>	

Please note the following Special Note definitions when answering these questions:

- *Logistics* refers to the process of managing the movement and deployment of people, and/or the movement and storage of goods and materials, from their source to their destination.
- A *logistics operation* may form part of an organisation’s activities or it may constitute a complete organisation.

<b>Question One</b>	
Explain the purpose of performance measurement.	
<b>Question Two</b>	
Identify and explain five principles that need to be followed when managing a performance measurement system. Your explanations must be relevant to a logistics operation.	
Principle	Explanation

**Question Three**

Describe ways of measuring (and/or determining ratios for) the following in relation to a logistics operation:

*Ratios of availabilities, utilisation and productivity in terms of:  
space*

*people*

*plant and equipment*

*Materials*

**Question Four**

Describe performance measures for customer service and costs in relation to a logistics operation.

## Assessment Task Two – Element 2

### Introduction

Assessment task two is designed to assess your ability to establish performance standards and monitoring systems for a logistics operation within the context of an organisation's business plan.

Range: functions, activities, information systems.

### Instructions

- In this task you must establish performance standards and monitoring systems for your organisation's logistics operation. The standards and systems must be within the context of your organisation's business plan. Please ensure your assessor has access to this plan.
- If you have already established these systems and standards, please provide evidence of having done so, ensuring the following information is included.
- If you have not yet established the systems and standards, please do so, ensuring that the following activities are included:
  1. Functions, activities and information systems to be monitored are determined.
  2. Performance standards are determined and clearly and concisely documented. These must be in accordance with both the business plan and the requirements of your customers and your organisation.
  3. Benchmarks for measurement must be set up.
  4. Methods of collecting data for measuring the performance standards must be established.
  5. The system for monitoring performance against documented standards must meet the business plan and the requirements of your organisation.
- When you have established your system please give your assessor copies of all relevant documentation.
- A manager's Verification Form is included at the end of this guide. The first part must be signed to confirm that your work is in accordance with the requirements of the organisation and the business plan.
- Your assessor may wish to discuss your work with you in order to gain sufficiency of evidence or clarification.

**The completed assessment for task two will include:**

- A copy of the organisation's business plan.
- Part One of Verification Form.
- Documentation relating to the measurement systems and performance standards established.
- Assessors notes where required.

## Assessment Task Three – Element 3

### Introduction

Assessment task three is designed to assess your ability to apply the monitoring systems.

### Instructions

- This task is to be completed once you have established your performance standards and monitoring systems and had them approved by your organisation.
- You must monitor performance standards using the system that you have established.
- You must collect and analyse the data against the requirements of the performance standards in order to identify levels of performance.
- The results of your data analysis must be presented in accordance with the method and format approved by your organisation. You must also include recommendations for remedial action where performance improvement is required.
- Ask your manager to complete the second part of the Verification Form. This is to confirm that the monitoring and analysis was done by you.
- Give your analysis and the Verification Form to your assessor. They may wish to discuss your work with you.

### The completed assessment for task three will include:

- Data analysis and conclusions.
- The completed Verification Form signed by the learner's manager.
- Assessor's notes where relevant.

## Verification Form

(to be completed by Manager)

<b>Name of Learner:</b>			
<b>Name of Verifier</b>			
<b>Position</b>		<b>Phone</b>	

\_\_\_\_\_ (name of learner) is currently being assessed toward unit standard 19020 develop performance standards and monitor performance for a logistics operation.

### Part One

The learner has been asked to establish performance standards and monitoring systems. Your confirmation is sought that the work is the learner's own, and the standards and systems meet the intention of your organisation's business plan, and customer and organisational requirements.

Comments

The assessor may contact you to discuss the learner's performance.

Signed:

Date:

**Part Two**

Your confirmation is sought that the learner has monitored the performance standards in accordance with the system they established, and has analysed the data in accordance with your organisation's requirements.

Comments

The assessor may contact you to discuss the learner's performance.

Signed:

Date:

Thank you for your assistance.

## Assessment Guide

These are the evidence and judgements that your assessor will use to assess your competence in unit standard 19020.

<b>Task / Element</b>	<b>Evidence required</b>	<b>Judgement</b>
<p><i>Task 1 / Element 1</i></p> <p>This task involves the learner answering questions about their knowledge performance measurement in a logistics context.</p>	<p>Answers to supplied questions.</p> <p>Assessor notes where relevant.</p>	<p>Learner explains the purpose of performance measurement.</p> <p>Learner identifies and explains at least five principles of managing performance measurement as they relate to a logistics operation.</p> <p>Learner describes measures and/or determine ratios for availabilities, utilisation and productivity in terms of:</p> <ul style="list-style-type: none"> <li>• space,</li> <li>• people,</li> <li>• plant,</li> <li>• materials, and equipment as they relate to a logistics operation.</li> </ul> <p>Learner describes measures for customer service and costs as they relate to a logistics operation.</p>
<p><i>Task 2 / Element 2</i></p> <p>This task involves the learner establishing performance measurement and monitoring systems.</p>	<p>Documented performance measurement system.</p> <p>Organisation's business plan.</p> <p>Part One of Verification Form signed by the manager.</p> <p>Assessor notes where relevant.</p>	<p>Performance measurement must cover the following range statement:</p> <ul style="list-style-type: none"> <li>• Functions</li> <li>• Activities</li> <li>• Information systems</li> </ul> <p>It must also relate to the business plan's objectives.</p> <p>Learner determines functions, activities and information systems to be monitored.</p> <p>Learner determines and documents the performance standards as required by the customer and the organisation.</p> <p>Documentation must be clear, concise and establish benchmarks for measurement.</p> <p>Learner establishes methods of collecting data for measurement that relate to the performance standards.</p>

<b>Task / Element</b>	<b>Evidence required</b>	<b>Judgement</b>
		<p>The system that the learner establishes for performance monitoring must be against documented standards and the business plan and requirements of the organisation.</p>
<p><i>Task 3 / Element 3</i></p> <p>In this task the learner must monitor the performance measuring systems and analyse the collected data.</p>	<p>Data analysis.</p> <p>Part Two of Verification Form signed by the manager.</p> <p>Assessor notes where relevant.</p>	<p>The learner must monitor the performance standards in accordance with the system established in Task 2.</p> <p>They must then collect and analyse the data to identify levels of the performance.</p> <p>The results of the analysis must be presented in accordance with the organisation's requirements and include recommendations for remedial action where performance improvement is required.</p>