

## SA OLIVE ORGANOLEPTIC TASTING PANEL HANDBOOK

### 1. INTRODUCTION AND SCOPE

The purpose of this handbook is to provide a common frame of reference for all Panelists participating in SA Olive's Organoleptic Tasting Panel.

This handbook is based on the IOC method, as described in COI/T.20/Doc. No 15/Rev. 10 2018. <https://www.internationaloliveoil.org/wp-content/uploads/2019/11/COI-T20-Doc.-15-REV-10-2018-Eng.pdf>.

As the aim for the SA Olive Organoleptic Tasting Panel is to have various and rotating Panel Leaders, the SA Olive Manager will execute certain administrative duties that are assigned to the Panel Leader in other panels. This also allows for the inclusion of the Panel Leader's score as part of the calculation of the Panel's Median Score.

Applicable terminology, vocabulary and intensity of perception of positive attributes are documented in standard COI/T.20/Doc. no. 4/Rev. 1 September 2007. <https://www.internationaloliveoil.org/wp-content/uploads/2019/11/COI-T.20-Doc.-No-4-Rev1-2007-Eng.pdf>

### 2. TASTING SESSIONS

#### a) TIMING

An annual calendar of tasting sessions is published at the beginning of the year.

Tasting sessions are held fortnightly on Mondays at 9h00 followed by Training and development sessions at 11h00.

The frequency of sessions may be increased during key periods, such as June-July.

#### b) LOCATION

Until further notice, tasting sessions are held at Klein Joostenberg Farm (KJF), R304 Muldersvlei 7607.

#### c) TASTING VENUE

Requirements for the tasting venue are outlined in COI/T.20/Doc. No 6/Rev.1 September 2007. <https://www.internationaloliveoil.org/wp-content/uploads/2019/11/COI-T.20-Doc.-No-6-Rev1-2007-Eng.pdf>

If ideal conditions cannot be met (as is often the case), then the tasting venue should meet the minimum requirements in terms of lighting, temperature, noise and odours.

- The tasting venue should be pleasant and suitably lighted, but neutral in style.
- The venue should be equipped with air conditioning to keep the temperature close to 20-25°C.

- No odours, noises or conversations from adjacent areas should disturb the Panel while at work.
- Dishwashing facilities should be available at the tasting venue, to ensure thorough cleaning of tasting glasses and minimize risk of breakage in transport.

Tasting stations must be adequately spaced to allow tasters to work comfortably.

A projector and screen should be available for review of scores and discussion.

A separate preparation area must be used for preparing samples, arranging glasses and trays.

#### **d) EQUIPMENT**

Tasting stations are laid out in a single row of tables, facing the front of the room. Each table accommodates two tasters and their equipment.

Tasting glasses conform to COI/T.20/Doc. no. 5/Rev 2 2020.

<https://www.internationaloliveoil.org/wp-content/uploads/2020/05/COI-T.20-Doc5-Rev2-2020-EN.pdf>

The following equipment must be available at each tasting station:

- tasting glasses containing the olive oil samples, covered with a lid, numbered;
- heating trays/baths to keep olive oil samples at  $28\text{ }^{\circ}\text{C} \pm 2\text{ }^{\circ}\text{C}$ ;
- plug points/extension cords to power the heating baths;
- tasting score sheets (conforming to COI/T.20/Doc. No 15/Rev. 10 2018);
- sheets for tasters' own notes;
- pen, ruler;
- apple, water, yogurt;
- spittoons;
- paper towels;
- crackers (optional)

#### **e) PREPARATION OF SAMPLES**

Oil samples are prepared prior to the beginning of the tasting session.

The identity of the oils being evaluated will remain unknown to the entire Panel, including the Panel Leader. This conforms to the CTC Procedural Manual, which specifies blind tasting.

All sample preparation is done in a separate preparation area, which is screened from the tasting area.

None of the Panelists is to access the preparation area – before, during or after the tasting session.

Samples are anonymised by assigning a sample number which reflects the order of tasting.

As far as possible, samples are ordered from Delicate to Medium to Intense according to the intensity and cultivars indicated on the label and/or sample entry information.

Where necessary, the Manager will consult with the Panel Leader regarding the order of presentation of the samples.

Suggested cultivar order: Arbequina, Picual, Frantoio, Leccino, Koroneilki, Mission, Don Carlo, Favolosa, Nocellara, Coratina

Each tasting glass should contain 14 - 16 ml of oil.

Samples must be kept at a constant temperature of  $28\text{ }^{\circ}\text{C} \pm 2\text{ }^{\circ}\text{C}$ . This temperature makes it easier to observe organoleptic differences than at ambient temperature; moreover, at lower temperatures the aromatic compounds peculiar to these oils volatilise poorly, while higher temperatures lead to the formation of volatile compounds peculiar to heated oils (see COI/T.20/Doc. no. 5/Rev 2 2020).

#### **f) TASTING PROCEDURE**

- Oils are presented to the Panelists in batches of six glasses at a time.
- Glasses are placed on the heating equipment.
- Panelists evaluate each oil using a separate score sheet.
- The oils being evaluated are unknown to the entire Panel, including the Panel Leader.
- The intensity of each attribute is marked on a 10-cm line scale and given a numerical value.
- This individual scoring process can be automated using electronic score sheets.
- Panelists hand in their scorecards to the Manager. These are not returned.
- Individual scores are captured by the Manager in an electronic spreadsheet.
- Once all scores have been entered, the Panel Leader reviews the classification and median values.

**The Panel Leader** may then at his/her discretion take one of the following actions:

- proceed with the tasting session;
- invite one/more Panelists to repeat the test;
- hold a discussion on certain scores/discrepancies/outliers (if it presents a learning opportunity).

Once the scores are accepted, the spreadsheet is saved and no further changes can be made.

If any of the samples require retasting, this must be scheduled before the conclusion of the session.

Discussions on every sample being tasted should be avoided as it extends the duration of the session and may affect the concentration of the Panelists.

In-depth discussions of oils should happen during periodic training and realignment sessions.

#### **g) PROTOCOL**

- Panelists are to confirm attendance at each tasting by the Friday prior to the tasting session.
- Panelists are expected to arrive 10 minutes before the start time of the tasting session.
- Should unforeseen circumstances occur, they are to inform the Panel Leader and Manager immediately.
- Mobile phones must be kept off / silent at all times to avoid disturbing others.
- Panelists must remain silent while performing their tasting.
- If any questions arise, Panelists should consult the Panel Leader quietly.

The following recommendations apply to any participant in an organoleptic tasting:

- Not smoke or drink coffee at least 30 minutes before the start time.
- Not use any fragrance, cosmetics or soap whose smell could linger.
- Use an unperfumed soap to wash their hands.

Should a Panelist feel physically unwell - in particular if their sense of smell or taste is affected – he/she shall refrain from tasting and inform the Panel Leader and Manager accordingly.

### **3. ROLES & RESPONSIBILITIES**

#### **a) PANELISTS**

All Panelists commit to acting in a professional and proficient manner while serving on the SA Olive Organoleptic Tasting Panel.

Panelists must:

- be objective in their assessments and set aside their personal taste;
- not be unduly influenced by others' scores/opinions;
- demonstrate confidence in their scores and be prepared to substantiate them if asked;
- commit to learning and improving continuously;
- accept the guidance and leadership of the Panel Leader.

Decisions made by the Panel are collectively owned, i.e. the Panel speaks with one voice.

Panelists contribute to ensuring that tasting sessions are constructive, inclusive and co-operative.

More experienced Panelists have a duty to share their knowledge with less experienced members.

Less experienced Panelists have a duty to address their knowledge gaps proactively, by

seeking guidance, mentoring, or training.

Panelists serving on the Tasting Panel can be grouped into **4 categories**:

- Panel Members,
- Panel Leaders
- Senior Panel Members,
- Guest Tasters, only limited to Training and development sessions until qualified.

#### **b) PANEL MEMBERS**

A Panelist who has obtained a minimum qualification such as an official Threshold Test (or equivalent) in the last two years, has attended at least 60% of the Tasting Sessions over a period of 1 year, and displayed conformity with the median scores of the Panel will be regarded as a Panel Member.

Panel Members are eligible for compensation as agreed by the Board of SA Olive.

#### **c) SENIOR PANEL MEMBERS**

A Panel Member who has obtained a minimum qualification such as an official Threshold Test (or equivalent) in the last two years, has attended at least 60% of the Tasting Sessions over a period of 2 years and displayed conformity with the median scores of the Panel will be regarded as a Senior Panel Member.

Senior Panel Members are eligible for compensation as agreed by the Board of SA Olive.

#### **d) GUEST TASTERS**

Guest tasters will be allowed to attend the Training and development sessions on Mondays from 11h00.

Their participation will be as observers and their scores will not be taken in consideration for the calculation of the median.

The main goals of inviting guest tasters are to:

- familiarise new tasters with the specific sensory methodology;
- develop and understanding of the significance of various attributes considered;
- develop/fine tune skills in recognising, identifying and quantifying the sensory attributes;
- familiarise new tasters with the olfactory-gustatory-tactile variations of virgin olive oils;
- broaden the pool of resources for succession and diversity purposes.

A Guest Taster may be invited to join the Panel as a Member after having obtained a minimum qualification such as an official Threshold Test (or equivalent), having attended at least 60% of the Tasting Sessions over a period of 1 year, having displayed conformity with the median scores of the Panel, and having been assessed by the Panel Leaders.

Guest Tasters must be informed of expectations and commitment required when formally joining the Panel.

Guest Tasters are not eligible for any compensation.

**e) PANEL LEADER**

Panel Leader duties are based on COI/T.20/Doc. No 15/Rev. 10 2018, as adapted to SA Olive's requirements.

The Panel Leader must be a suitably trained person (see COI/T.20/Doc. No 14/Rev. 7 2021) with an expert knowledge of the kinds of oils which he/she will come across in the course of their work and of the tools and skills of sensory analysis.

The Panel Leader must have passed an official Threshold Test (or equivalent) in the last two years and have a minimum of 3 years' continuous tasting experience as part of an organoleptic panel.

They must demonstrate meticulousness in the execution of the tasting sessions.

They must always demonstrate that the method and standards are applied consistently and that tasters are conforming.

Panel Leaders are responsible for mentoring and monitoring Panelists in order to ascertain their aptitude and training requirements, provide feedback, and establish if Panel recalibration is required.

They must seek ways of benchmarking the results and performance of the Panel with those obtained by other panels, in order to ascertain whether the Panel is working effectively.

Panel Leaders are expected to provide reliable, objective proof to support the performance appraisal of the Panelists and trainees.

It is the duty of the Panel Leader to motivate the Panelists by encouraging interest, curiosity and a constructive competitive spirit among them.

Panel Leaders will answer any queries regarding the tasting but shall refrain from suggesting any opinion on the samples.

Panel Leaders shall ensure that their opinion is not known and shall prevent tasters from asserting their criteria over one another.

It is an acceptable practice to spread the Panel Leader duties among several individuals. Moreover, this is a requirement to ensure rotation, succession and ultimately the sustainability of the Panel. Regular rotation allows individuals to practice and gain more experience as Panel Leaders.

Detailed information on qualifications and training of tasters and Panel Leaders can be found in COI/T.20/Doc. No 14/Rev. 7 2021 <https://www.internationaloliveoil.org/wp-content/uploads/2021/07/COI-T.20-Doc-14-REV-7-2021-EN.pdf>

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#### **f) MANAGER**

The Manager (or CEO) is accountable to the Board in respect of the SA Olive Tasting Panel and the CTC Scheme.

He/she is responsible for ensuring the integrity of decisions made by the Panel and the Panel 's credibility.

He/she ensures that auditable processes and procedures are in place, which are robust enough to withstand external scrutiny.

The Manager holds ultimate responsibility for keeping the records of the Panel. These records must be traceable, comply with agreed assurance and quality requirements and maintain the anonymity of samples.

He/she will develop and draft any procedures that might be necessary to complement existing standards and to ensure that the Panel functions effectively.

The Manager is responsible for the effective logistics of the tasting sessions, to include:

- inventory, storage, maintenance of equipment needed to carry out the functions of the Panel;
- reception and storage of the samples upon their arrival at the facility, as well as storage after tasting;
- reception and filing of all records accompanying sample submission;
- preparing, coding and presenting the samples to the tasters in line with best practices;
- ensuring sample anonymity at all times;
- capturing individual scores from the Panelists' scorecards;
- assembling, statistically processing and saving the data.

The Manager is responsible for generating Tasting Reports for each sample, delivering such reports to producers and addressing queries arising from producers.

He/she will rely on Panel Leaders' input to assess Panelists' performance and training requirements.

Identification of new tasters and rotation of Panel Leader duties are the responsibility of the Manager, as is the organising of training for the Panel.

The Manager will handle the processing of Panelists' claims in respect of attendance and travel.

He/she may delegate some of the functions to a designated individual, as appropriate.

#### **4. COMPOSITION OF THE PANEL**

The Panel is presently composed of the following individuals:

- Albert Marais,
- Aldo Mazzini\*,
- Alinda van Dyk\*,

- Benedetta Lami\*,
- Bianka Boezaart,
- Daniel Muzvenga,
- Gert van Dyk\*,
- Gill Lanham,
- Glynis van Rooyen,
- Jackie Loubser\*,
- Linda Costa\*,
- Louise Rabie\*,
- Marlene Loubser\*,
- Mike-Alec Kearney,
- Mpho Tshukudu,
- Petrus van Eeden,
- Reni Hildenbrand\*,
- Theresa Louw\*
- Mare Groenewald

\* indicates members of the 2022-2023 IOC accredited panel.

## **5. PANEL COMPENSATION**

Refer to the SA Olive Organoleptic Panel Compensation in the Appendix.



**APPENDIX**

**GUIDELINES FOR COMPENSATION OF THE  
SA OLIVE ORGANOLEPTIC TASTING PANEL**

**1. INTRODUCTION AND SCOPE**

The purpose of this document is to establish a clear and transparent guideline for the compensation of individuals participating in the SA Olive Organoleptic Tasting Panel (the Panel).

These guidelines were approved by the Board of Directors on 14 June 2022 and became applicable from the second quarter of 2022 onwards.

**2. COMPENSATION GUIDELINES**

Panelists serving on the SA Olive Panel can be grouped into 4 categories: Panel Members, Senior Panel Members, Panel Leaders and Guest Tasters.

Compensation criteria are summarised in the table below.

<b>Category</b>	<b>Attendance (R/session)</b>	<b>Travel (R/km) Max 200 km</b>	<b>Notes</b>
Panel Member	TBC	R 5.00 /km	For full sessions attended
Senior Panel Member	TBC	R 5.00 /km	For full sessions attended
Panel Leader	TBC	R 5.00 /km	For sessions led
Guest Taster	0	0	Exceptions for PDIs

**g) PANEL MEMBERS**

A Panellist who has obtained a minimum qualification such as an official Threshold Test (or equivalent) in the last two years, has attended at least 60% of the Tasting Sessions over a period of 1 year, and displayed conformity with the median scores of the Panel will be regarded as a Panel Member.

Panel Members are eligible for compensation at the rate per tasting session attended in full.

Panel Members are eligible to claim travel to/from the tasting venue at the rate of R5/km, subject to the maximum distance allowed.

#### **h) SENIOR PANEL MEMBERS**

A Panel Member who has obtained a minimum qualification such as an official Threshold Test (or equivalent) in the last two years, has attended at least 60% of the tasting sessions over a period of 2 years and displayed conformity with the median scores of the Panel will be regarded as a Senior Panel Member.

Senior Panel Members are eligible for compensation at the rate per tasting session attended in full.

Senior Panel Members are eligible to claim travel to/from the tasting venue at the rate of R5/km, subject to the maximum distance allowed.

#### **i) PANEL LEADER**

The Panel Leader is a suitably trained person who must have passed an official Threshold Test (or equivalent) in the last two years and have a minimum of 3 years' continuous tasting experience as part of an organoleptic panel.

Panel Leaders are eligible for compensation at the rate per tasting session that they lead. They will claim Senior Panel Member compensation for tasting sessions led by others.

Panel Leaders are eligible to claim travel to/from the tasting venue at the rate of R5/km, subject to the maximum distance allowed.

#### **j) GUEST TASTERS**

Guest Tasters are invited to participate in the tasting sessions from time to time.

Guest Tasters are not eligible for any compensation until they have become Panel Members. Exceptions may be made for PDIs, as per commitments made to Government.

#### **k) SAO MANAGER/CEO**

The SA Olive Manager/CEO is not eligible for compensation for attending Tasting sessions.

### **3. RECOMMENDATIONS**

It is recommended that travel claims be capped to a maximum of 200 km per tasting session.

It is further recommended that no attendance or travel claims be allowed in respect of training events which are paid for by SA Olive, unless attendance is required by SA Olive (e.g. Threshold Tests).

Practice and guided tasting sessions will be compensated as outlined under point 2.

All above recommendations were approved by the Board of Directors on 14 June 2022.