

# Specification

Edexcel NVQ/competence-  
based qualifications

## Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)

First registration January 2011



Edexcel, a Pearson company, is the UK's largest awarding organisation offering vocational and academic qualifications and testing, to employers, training providers, colleges, schools, and other places of learning in the UK, and in over 85 countries worldwide.

Our specialist suite of qualifications include NVQs, Apprenticeships, WorkSkills, Functional Skills, Foundation Learning, as well as our exclusive range of BTECs, from entry level right through to Higher National Diplomas.

*References to third party material made in this specification are made in good faith. Edexcel does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)*

Authorised by Roger Beard

Prepared by Lucy Stewart

Publications Code N025394

All the material in this publication is copyright

© Edexcel Limited 2011

# Contents

---

<b>Qualification title covered by this specification</b>	<b>1</b>
<b>Key features of the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)</b>	<b>2</b>
What is the purpose of this qualification?	2
Who is this qualification for?	2
What are the benefits of this qualification to the learner and employer?	2
What are the potential job roles for those working towards this qualification?	2
What progression opportunities are available to learners who achieve this qualification?	3
<b>What is the qualification structure for the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)?</b>	<b>4</b>
<b>How is the qualification graded and assessed?</b>	<b>6</b>
Assessment requirements/strategy	6
Types of evidence (to be read in conjunction with the assessment strategy in <i>Annexe D</i> )	7
<b>Centre recognition and approval</b>	<b>8</b>
Centre recognition	8
Approvals agreement	8
<b>Quality assurance</b>	<b>8</b>
<b>What resources are required?</b>	<b>8</b>
<b>Unit format</b>	<b>9</b>
<b>Units</b>	<b>11</b>
Unit 1: Ensure responsibility for actions to reduce risks to health and safety	13
Unit 2: Achieve effective working relationships with colleagues in the road passenger transport industries	17
Unit 3: Provide professional customer service in road passenger transport	25
Unit 4: Support Learners by Coaching in the Workplace	31
Unit 5: Develop and maintain work skills and knowledge in the passenger transport industry	35
Unit 6: Manage Conflict in the Road Passenger Transport Industry	39
Unit 7: Resolve customer service problems	45
Unit 8: Deal with customers in writing or using ICT	49

Unit 9: Deal with customers by telephone	55
Unit 10: Deal with customers face to face	61
Unit 11: Support customer service improvements	67
Unit 12: Prepare vehicle and driver rotas for road passenger transport timetabled operations	73
Unit 13: Implement schedules for road passenger transport operations	81
Unit 14: Process telephone bookings in the road passenger transport industries	85
Unit 15: Provide support to passengers with a severe disability	91
Unit 16: Provide support to passengers who require assistance	95
Unit 17: Monitor revenue protection and timetables in road passenger transport operations	101
Unit 18: Plan road passenger transport routes for customers	107
Unit 19: Operate an IT system in road passenger transport	111
<b>Further information</b>	<b>115</b>
<b>Useful publications</b>	<b>115</b>
How to obtain National Occupational Standards	115
<b>Professional development and training</b>	<b>116</b>
<b>Annexe A: Progression pathways</b>	<b>117</b>
The Edexcel qualification framework for the road passenger transport sector	117
<b>Annexe B: Quality assurance</b>	<b>119</b>
Key principles of quality assurance	119
Quality assurance processes	119
<b>Annexe C: Centre certification and registration</b>	<b>121</b>
What are the access arrangements and special considerations for the qualifications in this specification?	121
<b>Annexe D: Assessment requirements/strategy</b>	<b>123</b>
<b>Annexe E: Additional requirements for qualifications that use the term 'NVQ' in a QCF qualification title</b>	<b>129</b>
<b>Annexe F: Simulation</b>	<b>135</b>
<b>Annexe G: Assessment guidance</b>	<b>137</b>

## Qualification title covered by this specification

---

This specification gives you the information you need to offer the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)

Qualification title	Qualification Accreditation Number (QAN)	Accreditation start date
Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)	600/0078/8	01/12/2010

This qualification has been accredited within the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website. It will also appear on the Learning Aims Database (LAD), where relevant.

You should use the QCF Qualification Accreditation Number (QAN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique QCF reference number, which is listed in this specification.

The QCF qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

This qualification replaced the following qualification from 1st January 2011.

Qualification title	Qualification Accreditation Number (QAN)	Accreditation start date	Accreditation end date
Edexcel Level 2 NVQ in Road Passenger Transport Operations	500/5647/5	01/01/09	31/12/10

# Key features of the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)

---

This qualification:

- is nationally recognised
- is based on the GoSkills National Occupational Standards (NOS) for Road Passenger Transport Operations. The NOS, assessment requirements/strategy and qualification structure are owned by GoSkills.

## What is the purpose of this qualification?

This qualification has been developed by the Sector Skills Council GoSkills following extensive employer consultation and research. It addresses skills gaps and provides those working in operational support for the bus and coach industries with the opportunity to demonstrate evidence of technical competency and the underpinning knowledge relating to their work activities.

## Who is this qualification for?

This qualification is for all learners aged 18 and above who are capable of reaching the required standards.

Edexcel's policy is that the qualification should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification(s).

## What are the benefits of this qualification to the learner and employer?

This qualification allows learners to demonstrate competence against the National Occupational Standards which are based on the needs of the road passenger transport industry as defined by the Sector Skills Council, GoSkills. It contributes to the development of skilled employees in this sector.

## What are the potential job roles for those working towards this qualification?

This qualification is intended for people who are employed in providing a passenger transport operations service, for example customer service assistants, controllers, passenger services supervisors, transport planners and transport schedulers.

**What progression opportunities are available to learners who achieve this qualification?**

This qualification offers various opportunities for progression within the workplace.

Further information is available in *Annexe A*.

# What is the qualification structure for the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)?

---

Individual units can be found in the *Units* section.

To achieve the Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) learners must achieve a minimum of 29 credits – made up as follows:

- 11 mandatory credits
- minimum of 1 optional credit from Group 1
- minimum of 6 optional credits from Group 2
- minimum of 11 optional credits from Group 3.

Learners must not take more than 14 credits at Level 3.

Unit	Mandatory units	Credit	Level
	All three units must be taken. Credit value required: minimum 11, maximum 11.		
1	A/601/5867 – Ensure responsibility for actions to reduce risks to health and safety	4	3
2	R/602/5997 – Achieve effective working relationships with colleagues in the road passenger transport industries	3	2
3	R/602/6163 – Provide professional customer service in road passenger transport	4	2

Unit	Group 1 – Optional units	Credit	Level
	Learners must complete a minimum of 1 optional credit from this group. Credit value required: minimum 1.		
4	L/502/6118 – Support Learners by Coaching in the Workplace	4	3
5	K/502/5994 – Develop and maintain work skills and knowledge in the passenger transport industry	2	2
6	M/502/5995 – Manage Conflict in the Road Passenger Transport Industry	1	2



<b>Unit</b>	<b>Group 2 – Optional units</b> Learners must complete a minimum of 6 optional credits from this group. Credit value required: minimum 6.	<b>Credit</b>	<b>Level</b>
7	M/601/1511 – Resolve customer service problems	6	2
8	Y/500/8916 – Deal with customers in writing or using ICT	7	3
9	Y/600/0583 – Deal with customers by telephone	7	2
10	T/601/1221 – Deal with customers face to face	5	2
11	A/601/1530 – Support customer service improvements	5	2

<b>Unit</b>	<b>Group 3 – Optional units</b> Learners must complete a minimum of 11 optional credits from this group. Credit value required: minimum 11.	<b>Credit</b>	<b>Level</b>
12	K/602/6198 – Prepare vehicle and driver rotas for road passenger transport timetabled operations	10	3
13	J/602/6208 – Implement schedules for road passenger transport operations	3	2
14	A/602/6027 – Process telephone bookings in the road passenger transport industries	2	2
15	F/602/6210 – Provide support to passengers with a severe disability	3	2
16	Y/602/6214 – Provide support to passengers who require assistance	4	2
17	H/602/6216 – Monitor revenue protection and timetables in road passenger transport operations	10	3
18	K/602/6220 – Plan road passenger transport routes for customers	1	2
19	L/602/6226 – Operate an IT system in road passenger transport	3	2

## How is the qualification graded and assessed?

---

The overall grade for the qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

### Assessment requirements/strategy

The assessment requirements/strategy for these qualifications have been included in *Annexe D*. They have been developed by GoSkills in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

<b>Valid</b>	relevant to the standards for which competence is claimed
<b>Authentic</b>	produced by the learner
<b>Current</b>	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
<b>Reliable</b>	indicates that the learner can consistently perform at this level
<b>Sufficient</b>	fully meets the requirements of the standards.

### Types of evidence (to be read in conjunction with the assessment strategy in *Annexe D*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy(S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Edexcel standards verifier. A range of recording documents is available on the Edexcel website, [www.edexcel.com](http://www.edexcel.com). Alternatively, centres may develop their own.

# Centre recognition and approval

---

## Centre recognition

Centres that have not previously offered Edexcel qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Edexcel approval are able to gain qualification approval for a different level or different sector via Edexcel online.

## Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Edexcel will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

## Quality assurance

---

Detailed information on Edexcel's quality assurance processes is given in *Annexe B*.

## What resources are required?

---

Each qualification is designed to support learners working in Operational Support in the Bus and Coach Industry. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe D: Assessment requirements/strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

# Unit format

Each unit in this specification contains the following sections.

<b>Unit title:</b>					The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).
<b>Unit reference number:</b>					This is the unit owner's reference number for the specified unit.
<b>QCF level:</b>					All units and qualifications within the QCF have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry level to level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional.
<b>Credit value:</b>					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
<b>Guided learning hours:</b>					A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private study.
<b>Unit summary:</b>					This provides a summary of the purpose of the unit.
<b>Assessment requirements/evidence requirements:</b>					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
<b>Assessment methodology:</b>					This provides a summary of the assessment methodology to be used for the unit.
<b>Learning outcomes:</b>	<b>Assessment criteria:</b>	<b>Evidence type:</b>	<b>Portfolio reference:</b>	<b>Date:</b>	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	



# Units





**Unit 1:** **Ensure responsibility for actions to reduce risks to health and safety**

Unit reference number: A/601/5867

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 38

## Unit summary

The aim of this unit is to provide learners with the knowledge/understanding/skills to understand their health and safety responsibilities in the workplace.

### Assessment requirements/evidence requirements

- 1 The common evidence requirements below are in addition to the ENTO Assessment Strategies approved by UKCG in February 2008.
- 2 The standards require evidence of consistent occupational competence, as defined by the standards, to be demonstrated through relevant work activities. A variety of assessment methods should be used to confirm competence. Assessment of knowledge should be integrated with the assessment of performance wherever possible and appropriate.
- 3 Assessment of performance and knowledge in the workplace: All evidence must be derived from performance in the workplace with no exceptions. Therefore, no simulated working conditions have been specified in this Assessment Strategy as the outcomes can be demonstrated by a combination of other assessment methods drawn from:
  - direct observation of the candidate in the workplace
  - witness testimony by colleagues and line managers of the candidate's successful performance of activities in the workplace
  - documentary and other product-based evidence
  - a personal report by the candidate endorsed by colleagues
  - questions
  - discussion
  - professional discussion.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

## **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to identify the hazards and evaluate the risks in the workplace	<p>1.1 Identify workplace instructions that are relevant to them and their job role</p> <p>1.2 Identify working practices and hazards in the workplace that could be harmful</p> <p>1.3 Evaluate the hazards and prioritise in risk order</p> <p>1.4 Report hazard(s) to the responsible person</p>			
2 Be able to reduce the risks to health and safety in the workplace	<p>2.1 Perform work activities at own level of competence in accordance with identified health and safety:</p> <ul style="list-style-type: none"> <li>- workplace policies</li> <li>- instructions and procedures,</li> <li>- suppliers and manufacturers' information and</li> <li>- relevant legal requirements</li> </ul> <p>2.2 Manage hazards in accordance with workplace instructions and legal requirements</p> <p>2.3 Report any differences between workplace instructions and supplier/manufacturer instructions</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to reduce risks to health and safety in the workplace	<p>3.1 Explain their responsibility in remaining alert to hazards and risks</p> <p>3.2 Describe own responsibilities and scope for action in controlling risk</p> <p>3.3 Explain the importance of adhering to health and safety policies and practices</p> <p>3.4 Describe where and when to get additional health and safety assistance</p> <p>3.5 Describe the importance of personal presentation and behaviour in maintaining health and safety in the workplace</p>			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

(if sampled)

## **Unit 2:** **Achieve effective working relationships with colleagues in the road passenger transport industries**

<b>Unit code:</b>	RPVD 7
<b>Unit reference number:</b>	R/602/5997
<b>QCF level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	19

---

### **Unit summary**

The purpose of this unit is for learners to demonstrate occupational competence in achieving effective working relationships with colleagues in the road passenger transport industries. This unit is particularly suitable for learners who work in driving or passenger support roles in the road passenger transport industries.

This unit relates to GoSkills National Occupational Standard Unit 7 – Achieve Effective Working Relationships with Colleagues in the Road Passenger Transport Industry from the Road Passenger Vehicle Driving suite, and Unit 2 – Achieve Effective Working Relationships with Colleagues in the Road Passenger Transport Industries.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning and professional discussion.

Simulation must not be used to assess this unit.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPVD 7), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to achieve effective working relationships with colleagues	<p>1.1 Behave towards colleagues in line with organisational procedures</p> <p>1.2 Respond to requests from colleagues promptly and willingly</p> <p>1.3 Meet any undertakings given to colleagues within the agreed way and timescale</p> <p>1.4 Provide information colleagues ask for that is accurate, clear and given promptly</p> <p>1.5 Take part in discussions about working relationships</p> <p>1.6 Support colleagues who are learning, to help develop their skills and knowledge</p> <p>1.7 Discuss problems with the appropriate person if there are difficulties in working relationships, or work practices</p> <p>1.8 Identify potential areas of conflict with colleagues</p> <p>1.9 Negotiate with colleagues to sort out conflict situations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to achieve effective working relationships with colleagues</p>	<p>2.1 Describe the need for effective working relationships in the workplace</p> <p>2.2 Describe organisational procedures relating to behaviour in the workplace</p> <p>2.3 Describe how to balance giving help to colleagues with own personal workload</p> <p>2.4 Describe the limits of own personal and colleagues responsibilities</p> <p>2.5 Describe the learning needs of colleagues who are being trained</p> <p>2.6 Describe organisational procedures for:</p> <ul style="list-style-type: none"> <li>- dealing with and discussing difficulties in working relationships</li> <li>- dealing with conflict within the workplace</li> </ul> <p>2.7 Describe the skills that could be used to sort out conflicts and deal with aggressive behaviour in the workplace</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to achieve effective communications with colleagues	3.1 Obtain information required from colleagues in line with organisational procedures 3.2 Give information to colleagues that is relevant and will meet their needs 3.3 Communicate information in a format that is appropriate 3.4 Confirm personal authorisation to give the information provided 3.5 Get help in cases where there are difficulties in communicating effectively with colleagues 3.6 Identify weaknesses with own personal communication skills			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Know how to achieve effective communications with colleagues</p>	<p>4.1 Describe the need for accurate and relevant information to be communicated within the workplace</p> <p>4.2 Describe the methods of getting and giving information between colleagues</p> <p>4.3 Describe the limits of own personal authority relating to providing information</p> <p>4.4 Describe the different formats in which information can be communicated and their uses</p> <p>4.5 Describe the need for providing, and ways to provide, colleagues with opportunities to communicate freely and openly</p> <p>4.6 Describe organisational procedures for dealing with and reporting difficulties in communicating freely and openly</p> <p>4.7 Describe how to identify and deal with weaknesses with own personal communication skills</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to promote equality and diversity in the workplace	<p>5.1 Make sure that personal behaviour, words and actions promote equality and diversity in the workplace</p> <p>5.1 Identify own personal responsibilities and liabilities under equality legislation and relevant codes of practice</p> <p>5.3 Identify prejudice, discrimination and bullying in the workplace</p> <p>5.4 Deal with incidents of prejudice, discrimination and bullying in the workplace within the limits of own personal authority and organisational procedures</p>			
6 Know how to promote equality and diversity in the workplace	<p>6.1 Explain why equality and diversity in the workplace is important</p> <p>6.2 Describe what can cause prejudice and discrimination in the workplace</p> <p>6.3 Describe the organisational policy on equality and diversity</p> <p>6.4 Describe relevant legislation and codes of conduct aimed at achieving equality and diversity</p> <p>6.5 Describe personal responsibility regarding equality and diversity in the workplace</p>			

Learner name: _____	Date: _____
Learner signature: _____	Date: _____
Assessor signature: _____	Date: _____
Internal verifier signature: _____ (if sampled)	Date: _____



## **Unit 3: Provide professional customer service in road passenger transport**

<b>Unit code:</b>	RPTO 3
<b>Unit reference number:</b>	R/602/6163
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	13

---

### **Unit summary**

This unit is for those demonstrating competence in dealing with road passenger transport customers. This unit is particularly suitable for learners working in road passenger transport operations.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 3 – Provide a professional customer service in Road Passenger Transport Operations.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, written evidence and professional discussion.

Simulation must not be used to assess this unit.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry must be followed; please see *Annexe D*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to follow dress and behaviour codes to project a professional image	<p>1.1 Deal with customers in line with organisational procedures</p> <p>1.2 Consistently follow the relevant organisational dress and personal appearance codes</p>			
2 Know how to follow dress and behaviour codes to project a professional image	<p>2.1 Explain the importance for the organisation to have dress and behaviour codes</p> <p>2.2 Describe the organisational dress and personal appearance codes and explain their importance</p> <p>2.3 Explain how to deal with difficulties in meeting dress and personal appearance codes</p> <p>2.4 Describe opportunities to improve the service given to customers</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to develop professional relationships with customers</p>	<p>3.1 Acknowledge customers in line with organisational procedures</p> <p>3.2 Give information to customers within own limits of authority</p> <p>3.3 Follow organisational procedures for dealing with customers</p> <p>3.4 Refer customers to other appropriate people when outside own authority</p> <p>3.5 Record accurately information from customers that relates to the organisation and maintain confidentiality</p> <p>3.6 Identify and report issues with services, products or personalities that customers raise that could cause difficulties in accordance with organisational procedures</p> <p>3.7 Carry out own work to maximise convenience to the customer</p> <p>3.8 Identify other main providers of passenger transport related to the organisation's activity</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Know how to develop professional relationships with customers</p>	<p>4.1 Explain the organisation's policy and procedures for customer service</p> <p>4.2 Explain the limits of own authority</p> <p>4.3 Explain how to identify customer's individual needs</p> <p>4.4 Describe what customer service information benefits the organisation</p> <p>4.5 Describe the difficulties in delivering customer service</p> <p>4.6 Explain the procedures for referring customer service issues and the rules governing confidentiality</p> <p>4.7 Explain the importance of equal treatment for all customers</p> <p>4.8 Describe the make up of the passenger transport industry at national and local level</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to communicate effectively with customers	5.1 Communicate with customers in a way that is appropriate to their needs 5.2 Respond to customers' request in line with organisational procedures 5.3 Confirm that the information given meets the customer's needs 5.4 Deal with communication problems in line with organisational procedures			
6 Know how to communicate effectively with customers	6.1 Describe the main forms of verbal and non verbal communication and how to interpret them 6.2 Explain how to confirm customers understanding of the information provided 6.3 Explain where to get help to deal with communication difficulties			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)



## **Unit 4: Support Learners by Coaching in the Workplace**

<b>Unit code:</b>	BACEM 39
<b>Unit reference number:</b>	L/502/6118
<b>QCF level:</b>	3
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	26

---

### **Unit summary**

The purpose of this unit is for learners to demonstrate occupational competency in supporting learners by coaching in the workplace. It covers the skills and competences required to give learners information and guidance on their work role. In particular it covers the provision of job-related coaching.

This unit relates to GoSkills National Occupational Standard Unit 38 – Support Learners by Coaching in the Workplace.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominately in the workplace. Observation, witness testimony and professional discussion are all sources of evidence which can be used.

Simulation is not permitted.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (BACEM 39), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

### Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to support learners by coaching in the workplace	1.1 Take action to identify learners' needs and the resources and facilities required, including IT based resources, to undertake the coaching role to help them meet these needs			
	1.2 Identify what sources of information and support there are to help perform the role of coach			
	1.3 Take action to agree how progress and any problems will be reviewed during the coaching process			
	1.4 Within limits of own responsibility plan and maintain the coaching process			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to support learners by coaching in the workplace</p>	<p>2.1 Describe the role of a coach</p> <p>2.2 Explain the coaching process, in particular how to:</p> <ul style="list-style-type: none"> <li>- Provide appropriate coaching activities for particular situations including IT based programmes</li> <li>- Provide opportunities in the workplace for learners to develop skills and increase confidence</li> <li>- Plan and monitor coaching activity</li> <li>- Support structures available to learners</li> </ul> <p>2.3 Explain the different techniques of coaching, including how to:</p> <ul style="list-style-type: none"> <li>- Set goals and targets</li> <li>- Analyse tasks</li> <li>- Develop a plan</li> <li>- Instruct by sharing knowledge and skills</li> <li>- Communicate to learners in the most effective way, for example face-to-face, small groups</li> <li>- Obtain and give feedback</li> <li>- Analyse learners' strengths and weaknesses and help them to correct defects</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.4 Describe the personal attributes of effective coaches</p> <p>2.5 Explain the benefits that can be gained from coaching</p> <p>2.6 Explain the factors that can inhibit learning</p> <p>2.7 Describe the different problems that can be experienced by all new entrants</p> <p>2.8 Explain the extent of own responsibility and who problems that cannot be solved should be reported to</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## **Unit 5: Develop and maintain work skills and knowledge in the passenger transport industry**

<b>Unit code:</b>	RPTO 9
<b>Unit reference number:</b>	K/502/5994
<b>QCF level:</b>	2
<b>Credit value:</b>	2
<b>Guided learning hours:</b>	10

---

### **Unit summary**

The purpose of this unit is for learners to demonstrate occupational competence in developing and maintaining work skills and knowledge in the passenger transport industry. This unit is particularly suitable for learners who work in the passenger transport industry.

This unit relates to GoSkills National Occupational Standard Unit 9 – Develop and Maintain your Work Skills and Knowledge in Road Passenger Transport Operations from the Road Passenger Transport Operations suite.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, written evidence and professional discussion.

Simulation must not be used to assess this unit.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to develop and maintain work skills and knowledge	<p>1.1 Carry out activities to develop personal skills</p> <p>1.2 Balance personal needs and the needs of the organisation</p> <p>1.3 Discuss and agree with the appropriate person in the organisation how personal development needs will be met and get feedback</p> <p>1.4 Take action if progress is below the necessary standard</p>			
2 Know how to develop and maintain work skills and knowledge	<p>2.1 Identify and describe the standards of skills and knowledge needed in the role</p> <p>2.2 Describe how to measure current skills and identify areas needing development</p> <p>2.3 Describe process within the organisation for discussing and agreeing personal development plans and getting feedback</p> <p>2.4 Describe how to monitor progress against personal development plans</p> <p>2.5 Identify the main providers of passenger transport related to the role</p> <p>2.6 Describe the make up of the passenger transport industry at national and local level</p>			



Learner name:	_____	Date:	_____
Learner signature:	_____	Date:	_____
Assessor signature:	_____	Date:	_____
Internal verifier signature:	_____	Date:	_____
(if sampled)			



## **Unit 6: Manage Conflict in the Road Passenger Transport Industry**

<b>Unit code:</b>	RPTO 10
<b>Unit reference number:</b>	M/502/5995
<b>QCF level:</b>	2
<b>Credit value:</b>	1
<b>Guided learning hours:</b>	8

---

### **Unit summary**

The purpose of this unit is for learners to demonstrate occupational competence in managing conflict. This unit is particularly suitable for learners working in the road passenger transport industries.

This unit relates to GoSkills National Occupational Standard Unit 10 – Manage Conflict in Road Passenger Transport Operations from the Road Passenger Transport Operations suite.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence including, witness testimony, questioning, professional discussion and written evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPTO 10), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to assess situations and decide on action needed	<p>1.1 Recognise situations promptly that involve inappropriate behaviour by people</p> <p>1.2 Assess the personal risks and risks to others in the situation</p> <p>1.3 Assess the seriousness of the situation and the behaviour of the people involved</p> <p>1.4 Prioritise the action to be taken, in line with approved organisational guidelines</p> <p>1.5 Make sure the action planned meets organisational approved guidelines or procedures</p> <p>1.6 Consider the needs of others when dealing with the situation in line with organisational approved guidelines or procedures</p> <p>1.7 Get help from the appropriate sources in situations outside own personal authority or ability to deal with</p> <p>1.8 Collect and report necessary information about the people involved and the situation</p> <p>1.9 Assist other staff as appropriate to deal with conflict situations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Know how to assess situations and decide on action needed	<p>2.1 Describe the types of conflict situations that are likely to arise when working in the road passenger transport industries</p> <p>2.2 Describe how to carry out risk assessments in conflict situations and the factors that should be kept in mind</p> <p>2.3 Describe the actions that can be taken and are within own personal authorisation</p> <p>2.4 Describe when and how to get help when situations are outside own personal authority or ability to deal with</p> <p>2.5 Explain why information about the people involved and the situation should be collected and reported and the organisational procedures regarding this</p> <p>2.6 Describe how to maintain goodwill in conflict situations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to take action to deal with conflict	<p>3.1 Take action to deal with conflict situations in line with organisational procedures and guidelines</p> <p>3.2 Take control of the situation in a way that reduces any potential conflict</p> <p>3.3 Get help from the appropriate sources in situations that are outside own personal authority or ability</p> <p>3.4 Consider the needs of others when taking action</p> <p>3.5 Maintain personal safety and security, and that of others in the workplace, while taking action</p> <p>3.6 Report the details of any conflict situation in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to take action to deal with conflict	<p>4.1 Describe the action that can be taken - and which is within personal authorisation to take - with regard to resolving conflict between people</p> <p>4.2 Describe the organisational and relevant legal responsibilities when sorting out conflict situations</p> <p>4.3 Describe how to carry out positive responsive action to deal with conflict situations</p> <p>4.4 Describe how and at what point help should be sought</p> <p>4.5 Describe how to maintain own personal safety and security, and that of others and organisational property</p> <p>4.6 Describe organisational procedures and guidelines for dealing with and reporting conflict situations</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)





## **Unit 7: Resolve customer service problems**

**Unit reference number:** M/601/1511

**QCF level:** 2

**Credit value:** 6

**Guided learning hours:** 40

---

### **Unit summary**

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner's job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer's expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right.

This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

### **Assessment requirements/evidence requirements**

The assessment and quality assurance requirement for this unit provides evidence towards A and V units.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Spot customer service problems	<p>1.1 Listen carefully to customers about any problem they have raised</p> <p>1.2 Ask customers about the problem to check their understanding</p> <p>1.3 Recognise repeated problems and alert the appropriate authority</p> <p>1.4 Share customer feedback with others to identify potential problems before they happen</p> <p>1.5 Identify problems with systems and procedures before they begin to affect customers</p>			
2 Pick the best solution to resolve customer service problems	<p>2.1 Identify the options for resolving a customer service problem</p> <p>2.2 Work with others to identify and confirm the options to resolve a customer service problem</p> <p>2.3 Work out the advantages and disadvantages of each option for their customer and the organisation</p> <p>2.4 Pick the best option for their customer and the organisation</p> <p>2.5 Identify for their customer other ways that problems may be resolved if they are unable to help</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Take action to resolve customer service problems</p>	<p>3.1 Discuss and agree the options for solving the problem with their customer</p> <p>3.2 Take action to implement the option agreed with their customer</p> <p>3.3 Work with others and their customer to make sure that any promises related to solving the problem are kept</p> <p>3.4 Keep their customer fully informed about what is happening to resolve the problem</p> <p>3.5 Check with their customer to make sure the problem has been resolved to the customer's satisfaction</p> <p>3.6 Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to resolve customer service problems	<p>4.1 Describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 Explain how to defuse potentially stressful situations</p> <p>4.3 Describe how to negotiate</p> <p>4.4 Identify the limitations of what they can offer their customer</p> <p>4.5 Describe types of action that may make a customer problem worse and should be avoided</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## **Unit 8: Deal with customers in writing or using ICT**

**Unit reference number:** Y/500/8916

**QCF level:** 3

**Credit value:** 7

**Guided learning hours:** 55

---

### **Unit summary**

Some customer service delivery involves communicating with the customer in a way that creates a permanent record, either in writing or by using ICT. This form of communication carries risks and implications that are less likely to apply to a conversation held with a customer face to face or on the telephone.

This unit is about how written or ICT communication can be made effective and can contribute to excellent customer service.

### **Assessment requirements/evidence requirements**

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use written or ICT communication effectively	<p>1.1 Operate equipment to communicate in writing or using ICT efficiently and effectively</p> <p>1.2 Ensure that the period of time between exchanges in writing or using ICT represents excellent customer service</p> <p>1.3 Use language that is clear and concise</p> <p>1.4 Adapt their use of language to meet the individual needs of the customer</p> <p>1.5 Ensure that the style and tone of the written or ICT communication follows the organisation's guidelines and matches the service offer</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Plan and send an effective written or ICT communication	<p>2.1 Anticipate the customer's expectations taking account of any previous exchanges they may have had</p> <p>2.2 Assemble all the information they need to construct the communication</p> <p>2.3 Plan the objective of the communication</p> <p>2.4 Format the communication following the organisation's guidelines</p> <p>2.5 Open the communication positively to establish a rapport with the customer</p> <p>2.6 Ensure that the customer is aware of the purpose of the communication as early as possible</p> <p>2.7 Summarise the key point of the communication and any actions that they or their customer will take as a result</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Handle incoming written or ICT communications effectively	<p>3.1 Read the customer's communication effectively to identify the precise reason that the customer has contact them</p> <p>3.2 Identify what the customer is seeking as the outcome of the contact</p> <p>3.3 Identify all the options they have for responding to the customer and weigh up the benefits and drawbacks of each</p> <p>3.4 Choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.5 Summarise the outcome of the communication and any actions that they or the customer will take as a result</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Know and understand how to deal with customers effectively in writing or using ICT</p>	<p>4.1 The learner will know and understand the importance of using clear and concise language</p> <p>4.2 The learner will know and understand the additional significance and potential risks involved in committing a communication to a permanent record format</p> <p>4.3 The learner will know and understand the effects of style and tone on the reader of a written or ICT communication</p> <p>4.4 The learner will know and understand the importance of adapting their language to meet the needs of customers who may find the communication hard to understand</p> <p>4.5 The learner will know and understand the organisation's guidelines and procedures relating to written communication and the use of ICT to communicate</p> <p>4.6 The learner will know and understand how to operate equipment used for producing and sending written or ICT communications</p> <p>4.7 The learner will know and understand the importance of keeping their customer informed if there is likely to be any delay in responding to a communication</p> <p>4.8 The learner will know and understand the risks associated with the confidentiality of written or ICT communications</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## **Unit 9: Deal with customers by telephone**

**Unit reference number:** Y/600/0583

**QCF level:** 2

**Credit value:** 7

**Guided learning hours:** 70

---

### **Unit summary**

This unit is about the skills and competences needed when dealing with a customer by telephone. Customer satisfaction in this situation depends on good feelings about the way the transaction has been handled, as well as the features and benefits of the services or products that are offered to the customer.

While verbal communication is important, focus on the customer and the rapport that is formed also depends on the learner's skills with the telephone system and any information accessed while on the telephone to the customer.

### **Assessment requirements/evidence requirements**

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use the telephone system effectively	<p>1.1 Operate the telephone equipment efficiently and effectively</p> <p>1.2 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time</p> <p>1.3 Speak clearly and slowly to allow for the possibility that reception on the telephone line may not be perfect</p> <p>1.4 Adapt their speech to meet the individual needs of their customer</p> <p>1.5 Control the length of the conversation if the call is costing their customer money</p> <p>1.6 Ensure that promises to call back are kept</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Plan and make focussed telephone calls to their customer</p>	<p>2.1 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer</p> <p>2.2 Plan the opening part of their conversation with their customer and anticipate their possible responses</p> <p>2.3 Plan the objective of their call and the way in which they expect the call to end</p> <p>2.4 Open the conversation positively and establish a rapport with their customer</p> <p>2.5 Ensure that their customer is aware of the purpose of their call as early as possible</p> <p>2.6 Respond positively to queries and objections from their customer</p> <p>2.7 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>2.8 Listen carefully when collecting information from their customer so that they do not make mistakes or have to keep repeating the question</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Handle incoming calls effectively	<p>3.1 Greet their customer following their organisation's guidelines</p> <p>3.2 Listen closely to their customer to identify their precise reason for calling and what they are seeking as the outcome of the call</p> <p>3.3 Identify all the options they have for responding to their customer, weigh up the benefits and drawbacks of each</p> <p>3.4 Choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.5 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.6 Select the appropriate information they need to record and store following their organisation's guidelines</p> <p>3.7 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's expectations</p> <p>3.8 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know and understand how to competently deal with customers by telephone	4.1 Show that they know and understand the importance of speaking clearly and slowly when dealing with customers by telephone			
	4.2 Show that they know and understand the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone			
	4.3 Show that they know and understand the importance of adapting their speech to meet the needs of customers who may find their language or accent hard to understand			
	4.4 Show that they know and understand their organisation's guidelines and procedures for the use of telephone equipment			
	4.5 Show that they know and understand their organisation's guidelines and procedures for what should be said during telephone conversations with customers			
	4.6 Show that they know and understand what details should be included if taking a message for a colleague			
	4.7 Show that they know and understand how to operate the organisation's telephone equipment			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.8 Show that they know and understand the importance of keeping their customer informed if they are on hold during a call			
	4.9 Show that they know and understand the importance of not talking over an open telephone			
	4.10 Show that they know and understand their organisation's guidelines for handling abusive calls			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_



<b>Unit 10:</b>	<b>Deal with customers face to face</b>
<b>Unit reference number:</b>	T/601/1221
<b>QCF level:</b>	2
<b>Credit value:</b>	5
<b>Guided learning hours:</b>	33

---

### Unit summary

This unit is about the skills the learner needs to deal with their customer in person and face to face. When they are working with a customer in this way, good feelings about the way the learner looks and behaves can improve how their customer feels about the transaction and give them greater satisfaction. While verbal communication is important, the learner focus on their customer and the relationship that is formed also depends on the non-verbal communication that takes place between them. The learner will have many opportunities to impress their customer and their behaviour in this situation can make all the difference to customer behaviour and the satisfaction that they feel.

### Assessment requirements/evidence requirements

The assessment and quality assurance requirement for this unit provides evidence towards A and V units.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

- 1 Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

- 4 The learner's evidence must include examples of dealing with customers who:
  - a have standard expectations of the learner's organisation's customer service
  - b have experienced difficulties when dealing with the learner's organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
- 5 The learner's evidence must include examples of dealings with customers that are:
  - a planned
  - b unplanned.
- 6 The learner must provide evidence of dealing with customers face to face:
  - a during routine delivery of customer service
  - b during a busy time in their job
  - c during a quiet time in their job
  - d when people, systems or resources have let them down.
- 7 The learner must include examples of how they have made use of:
  - a verbal communication skills
  - b non-verbal communication skills.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Communicate effectively with their customer	<p>1.1 Plan a conversation with their customer that has structure and clear direction</p> <p>1.2 Hold a conversation with their customer that establishes rapport</p> <p>1.3 Focus on their customer and listen carefully to ensure that they collect all possible information they need from the conversation</p> <p>1.4 Explain their services or products and their organisation's service offer to their customer clearly and concisely</p> <p>1.5 Adapt their communication to meet the individual needs of their customer</p> <p>1.6 Anticipate their customer's requests and needs for information</p> <p>1.7 Balance conflicting demands for their attention whilst maintaining rapport with their current customer</p> <p>1.8 Calm down situations when one customer is adversely affecting the customer service enjoyed by other customers</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Improve the rapport with their customer through body language	<p>2.1 Present a professional and respectful image when dealing with their customer</p> <p>2.2 Show an awareness of their customer's needs for personal space</p> <p>2.3 Focus their attention on their customer so that non-verbal signs do not betray disinterest, boredom or irritation</p> <p>2.4 Ensure that their customer focus is not disrupted by colleagues</p> <p>2.5 Observe all customers and the total customer service situation whilst maintaining rapport with their current customer</p> <p>2.6 Observe their customer to read non-verbal clues about the customer's wishes and expectations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Understand how to deal with customers face to face</p>	<p>3.1 Explain the importance of speaking clearly and slowly when dealing with a customer face to face</p> <p>3.2 State the importance of taking the time to listen carefully to what the customer is saying</p> <p>3.3 Identify the organisation's procedures that impact on the way they are able to deal with their customers face to face</p> <p>3.4 Describe the features and benefits of the organisation's services or products</p> <p>3.5 Explain the organisation's service offer and how it affects the way they deal with customers face to face</p> <p>3.6 Explain the principles of body language that enables them to interpret customer feelings without verbal communication</p> <p>3.7 Explain the difference between behaving assertively, aggressively and passively</p> <p>3.8 Explain why the expectations and behaviour of individual customers will demand different responses to create rapport and achieve customer satisfaction</p> <p>3.9 Describe the agreed and recognised signs in customer behaviour in their organisation that indicates that their customer expects a particular action by them</p>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_

## **Unit 11: Support customer service improvements**

**Unit reference number:** A/601/1530

**QCF level:** 2

**Credit value:** 5

**Guided learning hours:** 33

---

### **Unit summary**

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. The learner's job involves delivering customer service. If the organisation has decided to make changes, it is the learner's job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved. This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

### **Assessment requirements/evidence requirements**

The assessment and quality assurance requirement for this unit provides evidence towards A and V units.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

- 1 The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

- 4 The learner must provide evidence that they have:
  - a contributed to improving customer service through their own efforts
  - b contributed to improving customer service by working with others.
- 5 The learner's evidence must cover two changes with which they have been actively involved. In each case they must be able to identify the part they played in:
  - a linking customer feedback with the reasons for the change
  - b implementing the change
  - c gathering customer reactions to the change.
- 6 The learner's evidence for each change must show how:
  - a the change has improved customer service
  - b their customers have reacted to the change.
- 7 Each change that is part of the learner's evidence must be significant enough for a regular customer to notice that the services or products they are delivering are different or that the way they and their colleagues deliver the services or products is different.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



### Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use feedback to identify potential customer service improvements	<p>1.1 Gather informal feedback from their customers</p> <p>1.2 Use their organisation's procedures to collect feedback from their customers</p> <p>1.3 Use the information from their customers to develop a better understanding of their customer service experience</p> <p>1.4 Identify ways the service they give could be improved based on information they have gathered</p> <p>1.5 Share their ideas for improving customer service with colleagues</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Implement changes in customer service	<p>2.1 Identify a possible change that could be made to improve customer service</p> <p>2.2 Present their idea for improving customer service to a colleague with the appropriate authority to approve the change</p> <p>2.3 Carry out changes to customer service procedures based on their own idea or proposed by their organisation</p> <p>2.4 Keep their customers informed of changes to customer service</p> <p>2.5 Give customers a positive impression of changes that have been made</p> <p>2.6 Work positively with others to support customer service changes</p>			
3 Assist with the evaluation of changes in customer service	<p>3.1 Discuss with others how changes to customer service are working</p> <p>3.2 Work with others to identify any negative effects of changes and how these can be avoided</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to support customer service improvements	<p>4.1 Explain how customer experience is influenced by the way service is delivered</p> <p>4.2 Identify how customer feedback is obtained</p> <p>4.3 Explain how to work with others to identify and support change in the way service is delivered</p> <p>4.4 Describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)



## **Unit 12: Prepare vehicle and driver rotas for road passenger transport timetabled operations**

<b>Unit code:</b>	RPTO 19
<b>Unit reference number:</b>	K/602/6198
<b>QCF level:</b>	3
<b>Credit value:</b>	10
<b>Guided learning hours:</b>	29

---

### **Unit summary**

This unit is for those demonstrating occupational competence in compiling and adjusting rotas for vehicles and drivers for timetabled passenger transport services. This unit is particularly suitable for learners working in roles with responsibility for making sure that workable and cost effective vehicle and driver rotas for timetabled passenger services are accessible and maintained.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 19 – Prepare vehicle and Driver rotas for Road Passenger Transport timetabled operations.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPTO 19), which must be adhered to, is detailed in *Annexe G*.

## **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare a vehicle rota	<p>1.1 Demonstrate understanding of the implications of a passenger service timetable on vehicle rotas</p> <p>1.2 Ensure rules for vehicle rotas are clear and agreed within the organisation</p> <p>1.3 Obtain information on vehicle availability during the period covered by the vehicle rota</p> <p>1.4 Identify internal and external factors that could impact on the vehicle rota</p> <p>1.5 Prepare the initial vehicle rota</p> <p>1.6 Amend the rota to meet daily timetable changes</p> <p>1.7 Review the vehicle duty against the peak vehicle requirement to improve utilisation</p> <p>1.8 Finalise a vehicle rota to meet legal and organisational requirements</p> <p>1.9 Communicate the rota to all relevant personnel</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to prepare a vehicle rota</p>	<p>2.1 Describe the rules and regulations the organisation must follow regarding vehicle utilisation</p> <p>2.2 Describe how to determine vehicle availability to meet the timetable</p> <p>2.3 Describe the impact on vehicle operations of the geographical area covered by the timetable</p> <p>2.4 Explain how to prepare vehicle rotas to achieve maximum vehicle utilisation without detriment to the timetable</p> <p>2.5 Explain how to use IT packages used by the organisation on vehicle rotas</p> <p>2.6 Explain how to work with others to achieve the vehicle rota</p> <p>2.7 Explain the consequences to the vehicle rota of changes to the daily timetable</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare a Drivers rota	<p>3.1 Develop driver rotas to ensure vehicles are fully crewed</p> <p>3.2 Ensure driver rotas comply with legislation on drivers hours and with organisational, national and local agreements</p> <p>3.3 Obtain all information on driver availability during the period covered by the driver rota</p> <p>3.4 Review daily workload for individual drivers for efficiency and cost effectiveness in according to organisational practice</p> <p>3.5 Agree the driver rotas with the appropriate officials and operating staff</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to prepare a Drivers rota	<p>4.1 Describe the statutory requirements and organisational agreements relating to drivers' hours</p> <p>4.2 Explain how to establish driver availability to implement the timetable during the period covered by the driver rota</p> <p>4.3 Describe the costs associated with driver utilisation</p> <p>4.4 Explain route information as it affects driver rotas</p> <p>4.5 Explain how to prepare driver rotas to maximise cost efficiency within the framework of the timetable and organisational practice</p> <p>4.6 Explain how to negotiate implementation of driver rotas with nominated officials and operating staff</p>			
5 Be able to monitor vehicle and Driver rotas	<p>5.1 Monitor the current vehicle and driver rotas</p> <p>5.2 Assist colleagues in implementing the rotas</p> <p>5.3 Identify problems with the rotas and make appropriate adjustments</p> <p>5.4 Identify additional resources or changes required for the delivery of the vehicle and driver rotas</p> <p>5.5 Involve all appropriate staff in any changes to rotas</p> <p>5.6 Comply with organisational and legal requirements for reports on monitoring activity</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Know how to monitor vehicle and Driver rotas	6.1 Explain how to monitor rotas effectively 6.2 Describe the support and assistance required by colleagues to implement rotas 6.3 Explain how to resolve problems effectively and efficiently 6.4 Explain how to assess the resource needs to support any changes to rotas 6.5 Describe the requirements for adequate driver and vehicle records to meet legal and organisational needs			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)



## **Unit 13: Implement schedules for road passenger transport operations**

**Unit reference number:** J/602/6208

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 15

---

### **Unit summary**

This unit is designed for dispatchers and schedulers working in taxi, private hire or community transport operations demonstrating occupational competence in implementing vehicle and driver schedules.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 29 – Implement schedules in Road Passenger Transport Operations.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPTO 20), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to implement the scheduling of road passenger transport	<p>1.1 Implement and monitor vehicle and driver schedules to meet customer requirements</p> <p>1.2 Provide support to colleagues involved in implementing schedules</p> <p>1.3 Use and monitor operational control systems to deliver the vehicle and driver schedules</p> <p>1.4 Identify and obtain additional resources to deliver vehicle and driver schedules</p> <p>1.5 Identify vehicle type and appropriate driver skills to meet passengers with impaired mobility</p> <p>1.6 Involve relevant colleagues in the effective delivery of vehicle and driver schedules</p> <p>1.7 Identify problems and make appropriate adjustments</p> <p>1.8 Deal with operational emergencies and issues in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to implement the scheduling of road passenger transport</p>	<p>2.1 Describe how to effectively implement and monitor vehicle and driver scheduling</p> <p>2.2 Describe the support required for those implementing the schedules</p> <p>2.3 Explain how to use operational control systems to deliver vehicle and driver schedules</p> <p>2.4 Explain when to use passenger sharing, its application and implementation</p> <p>2.5 Describe how to assess and obtain the resources needed to deliver the vehicle and driver schedules</p> <p>2.6 Describe how to encourage and motivate the support of others</p> <p>2.7 Explain how to prioritise and resolve problems</p> <p>2.8 Explain the need to maintain personal standards in dealing with emergencies and issues in line with organisational procedures</p>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_  
Date: \_\_\_\_\_



## **Unit 14: Process telephone bookings in the road passenger transport industries**

<b>Unit code:</b>	RPVD 20
<b>Unit reference number:</b>	A/602/6027
<b>QCF level:</b>	2
<b>Credit value:</b>	2
<b>Guided learning hours:</b>	8

---

### **Unit summary**

The purpose of this unit is for learners to demonstrate occupational competence in processing telephone bookings in the road passenger transport industry. This unit is particularly suitable for learners who work as telephone booking staff working in the road passenger transport industries.

This unit relates to *GoSkills* National Occupational Standard Unit 20 – Process Telephone Bookings in the Road Passenger Transport Industry from the Road Passenger Vehicle Driving suite.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning and written evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPVD 20), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to identify the prospective passenger's transport requirements	<p>1.1 Use the telephone and any associated IT equipment</p> <p>1.2 Accurately identify the prospective passenger's transport needs including any particular needs that would need to be accommodated</p> <p>1.3 Check whether the prospective passenger's needs can be met, where relevant clearly confirming the agreed transport arrangements, and confirming/checking their understanding of them</p> <p>1.4 Give clear explanations and suggestions to the prospective passenger about alternative transport arrangements if their requirements cannot be met and give the caller enough time to seek clarification of these alternatives</p> <p>1.5 Confirm clearly to the prospective passenger the agreed alternatives and check that they understand and agree them</p> <p>1.6 Identify, within the limits of own personal responsibility, when a caller needs help beyond that provided by the organisation and take appropriate action in agreement with the caller</p> <p>1.7 Make a correct record of all telephone conversations, in particular the agreed transport arrangements, or other help offered, in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Know how to identify the prospective passenger's transport requirements	<p>2.1 Describe how to use the telephone and any associated IT equipment</p> <p>2.2 List the transport services offered by the organisation and contact points in other support organisations</p> <p>2.3 Explain how to listen effectively and question prospective passengers in a way that is seen as supportive and helpful</p> <p>2.4 Explain the importance of tone of voice and giving a good impression of the organisation</p> <p>2.5 Explain how to communicate with callers who have speech or hearing difficulties or language/dialect differences to their own</p> <p>2.6 Describe how to check that a prospective passenger understands the agreed transport arrangements</p> <p>2.7 Describe how to identify and communicate with callers who need assistance over and above arranging transport</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to communicate changes to transport arrangements	<p>3.1 Call prospective passengers if previously agreed transport arrangements cannot be met in line with organisational procedures</p> <p>3.2 Make sure that the prospective passenger is aware of the change of plan to the transport arrangements</p> <p>3.3 Identify any problems likely to arise to the prospective passenger as a result of the change of transport arrangements</p> <p>3.4 Give clear suggestions about alternative transport arrangements and give the prospective passenger enough time to seek clarification of these alternatives</p> <p>3.5 Confirm clearly to the prospective passenger the agreed alternatives and check that they understand them</p> <p>3.6 Contact as appropriate, in line with organisational procedures, other staff to help ensure agreed transport arrangements with the prospective passenger are taken forward</p> <p>3.7 Make a correct record of all telephone conversations, in particular the agreed transport arrangements, or other help offered, in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Know how to communicate changes to transport arrangements</p>	<p>4.1 Describe organisational operational activity and implications for pre-booked passenger journeys</p> <p>4.2 Describe the action that should be taken if prospective passengers cannot be contacted by telephone</p> <p>4.3 Describe how to summarise operational difficulties in an understandable way and the various alternatives that might apply</p> <p>4.4 Explain how to listen effectively and question prospective passengers in a way that is seen as supportive and helpful</p> <p>4.5 Explain the importance of tone of voice and giving a good impression of the organisation</p> <p>4.6 Explain how to communicate with callers who have speech or hearing difficulties or who speak a language or dialect different to their own</p> <p>4.7 Describe how to check a prospective passenger's understanding of the revised transport arrangements</p> <p>4.8 Describe organisational arrangements for recording the telephone contact and progressing agreed arrangements</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## **Unit 15: Provide support to passengers with a severe disability**

<b>Unit code:</b>	RPTO 25
<b>Unit reference number:</b>	F/602/6210
<b>QCF level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	17

---

### **Unit summary**

This unit is for those demonstrating occupational competence in supporting passengers with a severe disability in their journey by road transport. This unit is particularly suitable for learners working in roles providing passenger support.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 25 – Provide support to passengers with a severe disability.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPTO 25), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare for the movement of passengers	<p>1.1 Check and confirm that the vehicle has the appropriate equipment for the journey</p> <p>1.2 Communicate with the passenger and other carers as appropriate</p> <p>1.3 Explain to the passenger, and driver as appropriate, the procedures for moving them</p> <p>1.4 Treat the passenger with dignity</p> <p>1.5 Check that any necessary accompanying documents are available</p> <p>1.6 Co-operate where appropriate with other carers involved to move the passenger as safely and as comfortably as possible</p> <p>1.7 Take action in discussion with the driver where problems arise that may affect how the passenger is supported</p> <p>1.8 Adhere to the relevant legislation and codes of practice when deciding on the help given</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to prepare for the movement of passengers</p>	<p>2.1 Describe how to check and confirm the passenger's support equipment is appropriate</p> <p>2.2 Explain how to secure the different types of equipment required for safe movement including</p> <ul style="list-style-type: none"> <li>- wheelchairs</li> <li>- stretchers</li> <li>- trolleys</li> </ul> <p>2.3 Describe how to communicate with the passenger and other carers as appropriate</p> <p>2.4 Describe the legal rights of the passenger to travel safely, comfortably and with dignity</p> <p>2.5 Explain the limits of own authority</p> <p>2.6 Describe what documents accompany the passenger</p> <p>2.7 Describe how to deal with problems that may arise on the journey</p> <p>2.8 Describe the legislation and codes of practice related to providing help to passengers</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to support passengers during a journey	3.1 Assist the passenger and where relevant the carer to get in the vehicle at the start of the journey 3.2 Give help to the passenger on the journey 3.3 Communicate with the passenger during the journey 3.4 Make sure the passenger is safe and secure throughout the journey 3.5 Assist the passenger and where relevant other carers to leave the vehicle 3.6 Ensure the passenger is handed to suitable carer			
4 Know how to support passengers during a journey	4.1 Explain the boarding process 4.2 Describe how to provide support during the journey 4.3 Explain the exit and handover procedures			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)

## **Unit 16: Provide support to passengers who require assistance**

<b>Unit code:</b>	RPTO 26
<b>Unit reference number:</b>	Y/602/6214
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	16

---

### **Unit summary**

This unit is for those demonstrating occupational competence in accompanying passengers who require assistance on their road journey and dealing with their specific needs. This unit is particularly suitable for learners working in roles providing passenger support.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 26 – Provide support to passengers who require assistance.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*. Specific assessment guidance for this unit (RPTO 26), which must be adhered to, is detailed in *Annexe G*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare for journeys with passengers who require assistance	1.1 Make sure any special information about the passengers being supported is complete 1.2 Establish working relationship with the driver 1.3 Confirm and carry out checks that the vehicle is appropriately equipped for the passengers' needs 1.4 Report defects to support equipment in line with organisational procedures 1.5 Confirm all documentation relating to passenger support is correct and in line with organisational requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to prepare for journeys with passengers who require assistance</p>	<p>2.1 Describe the special information required about the passengers needs</p> <p>2.2 Describe limits of own and driver responsibility</p> <p>2.3 Describe the relevant legislation covering the carriage of:</p> <ul style="list-style-type: none"> <li>- children</li> <li>- wheelchairs</li> </ul> <p>2.4 Describe how to use the different types of equipment for seating and securing passengers including the appropriate safety checks</p> <p>2.5 Describe the organisational arrangements for reporting defects to equipment</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to support passengers during a journey</p>	<p>3.1 Maintain a relationship with the vehicle driver</p> <p>3.2 Assist the passenger in and out of the vehicle in line with legislation</p> <p>3.3 Use vehicle access equipment in line with organisational procedures</p> <p>3.4 Make sure seatbelts are correctly used</p> <p>3.5 Deal with passenger requests for assistance to meet their needs and maintain their dignity</p> <p>3.6 Provide support to ensure the passenger is safe and comfortable</p> <p>3.7 Take action in line with organisational procedures if any passenger is not at their agreed pick up point</p> <p>3.8 Take action in line with organisational procedures if there are unplanned problems with passengers on the journey</p> <p>3.9 Fill in the necessary documentation relating to the journey and pass to the appropriate person in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to support the passengers during a journey	<p>4.1 Describe the methods of offering and giving help to passengers</p> <p>4.2 Describe the dangers and risks associated with picking up and setting down passengers</p> <p>4.3 Describe the requirements for the safe use of equipment</p> <p>4.4 Describe the approved procedures for dealing with defective passenger safety equipment</p> <p>4.5 Explain the action to take if a passenger is not at the pick up point</p>			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_





## **Unit 17: Monitor revenue protection and timetables in road passenger transport operations**

<b>Unit code:</b>	RPTO 27
<b>Unit reference number:</b>	H/602/6216
<b>QCF level:</b>	3
<b>Credit value:</b>	10
<b>Guided learning hours:</b>	39

---

### **Unit summary**

This unit is for those demonstrating occupational competence in protecting fare revenue and monitoring vehicles running to timetable. This unit is particularly suitable for learners working in the road passenger transport industry who carry out timetable and revenue inspection roles.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 27 – Monitor revenue protection and timetables in Road Passenger Transport Operations.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to monitor the organisation's fare policies	1.1 Implement the organisation's conditions of carriage 1.2 Implement the organisation's policies on fares 1.3 Arrange ticket checks on vehicles taking into account customer/public safety 1.4 Deal with difficult situations that arise from the ticket checks in line with organisational policy 1.5 Complete the paperwork and records in line with organisation's procedures 1.6 Liaise with appropriate authorities over irregularities that occur			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to monitor the organisation's fares policy</p>	<p>2.1 Describe the organisations conditions of carriage</p> <p>2.2 Describe the organisations fares policy covering own area of responsibility</p> <p>2.3 Explain how to arrange ticket checks on vehicles</p> <p>2.4 Explain how to deal with difficult situations that can arise with drivers and customers</p> <p>2.5 Explain how to identify potential fraud activity</p> <p>2.6 Explain the organisation's procedures for completing paperwork and records for revenue protection</p> <p>2.7 Describe the limits of own authority in revenue protection, the roles of other staff and authorities and the reporting lines to these authorities</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to monitor timetable adherence	3.1 Check the vehicles are running to time 3.2 Find out from drivers the reasons for deviation from timetable and take appropriate action 3.3 Identify problems that can cause an interruption to a service 3.4 Report problems to appropriate staff and obtain details of contingency arrangements 3.5 Ensure all affected staff are aware of the contingency arrangements 3.6 Complete paperwork in line with organisational procedures			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to monitor timetable adherence	<p>4.1 Describe the timetable relevant to the monitoring area</p> <p>4.2 Describe the traffic flows in the monitoring area</p> <p>4.3 Explain how to assist drivers to meet their schedules</p> <p>4.4 Explain the organisation's policy on dealing with drivers who consistently do not run to schedule</p> <p>4.5 Describe the road system in the monitoring area and potential hazards to the organisation's vehicles</p> <p>4.6 Explain the limits of own authority in dealing with contingency arrangements and the roles of others involved</p> <p>4.7 Describe the organisation's procedures for completing paperwork</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)



## **Unit 18: Plan road passenger transport routes for customers**

<b>Unit code:</b>	RPTO 31
<b>Unit reference number:</b>	K/602/6220
<b>QCF level:</b>	2
<b>Credit value:</b>	1
<b>Guided learning hours:</b>	8

---

### **Unit summary**

This unit is for those demonstrating occupational competence in providing road journey information to support a customers travel arrangements.

This unit relates to the GoSkills Road Passenger Transport Operations National Occupational Standard Unit 31 – Plan road passenger transport routes for customers.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Simulation must not be used to assess this unit.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to plan a customer journey	1.1 Locate a defined place using available resources 1.2 Arrange a journey between two or more places identifying the most suitable and efficient route 1.3 Identify an alternative route in the event of delay 1.4 Summarise directions 1.5 Estimate the journey time between two or more destinations			
2 Know how to plan a customer journey	2.1 Describe the types and sources of media and the most appropriate one to use 2.2 Describe how to identify key locations and their directions outside the local area 2.3 Describe how to identify key locations and obstacles within the local area that will influence the choice of route 2.4 Describe the relevant regulations regarding boundaries for the service operations			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to communicate with customers about routes	3.1 Agree the information with the customer 3.2 Communicate with the customer any anticipated delays and their reason 3.3 Give estimated changed journey times to the customer 3.4 Provide the customer with the fare or means of estimating the fare			
4 Know how to communicate with customers about routes	4.1 Explain why it is important to keep the customer informed of any anticipated delays 4.2 Describe the relevant regulations on where a driver can collect or drop off 4.3 Explain the need for understanding the customers journey requirements 4.4 Describe how to access the appropriate travel news affecting a proposed journey including: – road information – rail information – air information 4.5 Describe the different payment options			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## **Unit 19: Operate an IT system in road passenger transport**

<b>Unit code:</b>	RPTO 37
<b>Unit reference number:</b>	L/602/6226
<b>QCF level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	13

---

### **Unit summary**

This unit is for those demonstrating occupational competence in using information technology hardware and software systems in Road Passenger Transport Operations.

This unit relates to the GoSkills Road Passenger Transport National Occupational Standard Unit 37 – Operate an IT system in Road Passenger Transport Operations.

### **Assessment requirements/evidence requirements**

This unit should be assessed predominantly in the workplace through observation, along with other sources of evidence such as, witness testimony, questioning, professional discussion, written and product evidence.

Realistic workplace simulation may be used to assess areas that cover non-routine situations.

All simulations using specially constructed environments need to be approved by Edexcel prior to use. The setting up or devising of assessment situations do not need to be approved by Edexcel if they take place in the normal workplace environment.

The overarching assessment strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) must be followed; please see *Annexe D*.

### **Assessment methodology**

Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to use IT systems in the road passenger transport environment	<p>1.1 Start up and correctly use the different types of IT systems and hardware used at work</p> <p>1.2 Use and operate IT hardware in a way that conforms with legislation and regulations</p> <p>1.3 Identify and correct errors on the IT systems and hardware</p> <p>1.4 Seek assistance when difficulties occur with IT systems</p> <p>1.5 Maintain work schedules during system failures</p> <p>1.6 Use the internet in line with organisational guidelines</p> <p>1.7 Close down the IT systems to maintain data security and ensure hardware security</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Know how to use an IT system in the road passenger transport environment	<p>2.1 Describe the computer hardware and how to get the optimum from its use</p> <p>2.2 Describe the legal requirements for IT systems operation including:</p> <ul style="list-style-type: none"> <li>- health and safety (Display Screen Regulations)</li> <li>- data protection regulations</li> <li>- copyright legislation</li> </ul> <p>2.3 Explain the limits of own technical competence and how to get technical support</p> <p>2.4 Describe the effects of system failure and how to maintain data integrity</p> <p>2.5 Explain the organisation's policy on the use of the internet and the risk associated with its use</p> <p>2.6 Describe the procedures for closing down systems including the policy on data security and storage</p>			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_  
(if sampled)

Date: \_\_\_\_\_



## Further information

---

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DiDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

## Useful publications

---

Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually
- functional skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Ofqual, August 2008)
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Edexcel website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

## How to obtain National Occupational Standards

To obtain the National Occupational Standards please go to [www.ukstandards.org.uk](http://www.ukstandards.org.uk).

## Professional development and training

---

Edexcel supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website ([www.edexcel.com/training](http://www.edexcel.com/training)). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.



## Annexe A: Progression pathways

The Edexcel qualification framework for the road passenger transport sector

Level	BTEC specialist qualification / professional	NVQ/competence
5		
4		
3		<p>Edexcel Level 3 NVQ Diploma in Passenger Carrying Vehicle Driving Instruction (QCF)</p> <p>Edexcel Level 3 NVQ in Road Passenger Transport Operations (expiry date 31/03/11)</p>
2	<p>Edexcel BTEC Level 2 Award in Knowledge for a Professional Bus or Coach Driver (QCF)</p> <p>Edexcel BTEC Level 2 Award in Transporting Passengers by Taxi and Private Hire (expiry date 31/03/11)</p> <p>Edexcel BTEC Level 2 Certificate in Introduction to the Role of the Professional Taxi and Private Hire Driver (QCF)</p>	<p>Edexcel Level 2 NVQ Diploma in Passenger Carrying Vehicle Driving (Bus and Coach) (QCF)</p> <p>Edexcel Level 2 NVQ Certificate in Road Passenger Vehicle Driving (Taxi and Private Hire) (QCF)</p> <p>Edexcel Level 2 NVQ Certificate in Road Passenger Vehicle Driving (Community Transport) (QCF)</p> <p><b>Edexcel Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF)</b></p>
1		
Entry		



## Annexe B: Quality assurance

---

### Key principles of quality assurance

- A centre delivering Edexcel qualifications must be an Edexcel recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Edexcel makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Edexcel qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

### Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Edexcel. Edexcel is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Edexcel seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Edexcel operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Edexcel.

The Edexcel quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Edexcel qualifications
- annual visits to centres by Edexcel for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by an Edexcel quality development reviewer
- annual visits by occupationally competent and qualified Edexcel Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

## Annexe C: Centre certification and registration

---

Edexcel Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Edexcel will maintain the integrity of Edexcel QCF NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Edexcel will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Edexcel in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Edexcel will aim to secure the appropriate expertise to provide this.

### **What are the access arrangements and special considerations for the qualifications in this specification?**

Centres are required to recruit learners to Edexcel qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Edexcel's policy on access arrangements and special considerations for Edexcel qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details ([www.edexcel.com](http://www.edexcel.com)).



## Annexe D: Assessment requirements/strategy

---



### **Assessment Strategy for Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry based on GoSkills National Occupational Standards**

#### **1. Introduction**

*GoSkills*, as the Sector Skills Council for the Passenger Transport Sector, is responsible for developing an assessment strategy for the qualifications based on its national occupational standards. This assessment strategy includes the Additional Requirement for Qualifications that use the title NVQ within the QCF which appears as *Annexe E*.

This responsibility means that *GoSkills* must:

- a Recommend how external quality control of assessment will be achieved
- b Define which aspects of the national occupational standards must always be assessed through performance in the workplace
- c Define the extent to which simulated working conditions may be used to assess competence and any characteristics that simulations should have, including definitions (where appropriate) of what would constitute a 'realistic working environment' (RWE) for the qualifications concerned
- d Define the occupational expertise requirements for assessors and verifiers in consultation with industry and in agreement with awarding organisations.

This Assessment Strategy for the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry addresses the four areas indicated above.

## **2. Review and Evaluation of this Strategy**

*GoSkills* and awarding organisations will continually monitor the effectiveness of this strategy. It will be reviewed annually and revised where necessary every two years. *GoSkills* will therefore establish arrangements for awarding organisations to provide feedback which will assist in the evaluation and review of this strategy. This feedback will also be used to evaluate assessment and verification practices, identify and promulgate good practice and inform any improvements to be made to this strategy.

Awarding organisations and their approved centres will be encouraged to submit comments and suggestions for improvements. This will be through formal dialogue between *GoSkills* and the awarding organisations.

## **3. External Quality Control of Assessment**

The quality of the assessment process is the responsibility of the awarding organisations. *GoSkills* encourages flexibility and innovation of approach alongside robust systems to support quality control. However, awarding organisations must detail their approach to each of the following.

### **3.1 External Verification**

External Verifiers (EVs) should verify assessments at approved centres. The normal frequency of external verification visits is two per year (a total of two days per year). However, the exact frequency should be determined by the risk assessment.

The verification should include inspection of the records of evidence and assessment. Awarding organisations should consider rotating their external verifiers in order to encourage standardisation, independence of assessment and the sharing of good practice.

### **3.2 Risk Assessment**

In order to promote appropriate levels of monitoring of centres, *GoSkills* requires awarding organisations to adopt a risk management system. This approach is consistent with the approach taken by the regulatory authorities. Where there is a risk to the quality and consistency of assessment (eg as a result of commercial interests or as a result of relationships between candidates and assessors), awarding organisations should ensure that appropriate mechanisms are in place to ensure the reliability of the assessment.

Awarding organisations should show that a risk assessment has been carried out for each approved centre and that a strategy to minimise any identified risk has been implemented.

### **3.3 Awarding Organisation Forum**

*GoSkills* will arrange regular awarding organisation meetings. The aim of the meetings will be to promote consistency in the assessment process. All awarding organisations offering Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry will be required to attend the awarding organisation forum at least once per year.



## **4. Evidence**

### **4.1 Evidence from Workplace Performance**

Wherever possible, evidence of occupational competence should be generated and collected through performance under workplace conditions. These conditions would be those typical of the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible.

It is accepted that not all employees have identical work place conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works. Assessment of an individual against the qualification standard must not put that individual under more, or less, pressure than found normally in the workplace. It could be the case that the individual could feel more pressure simply because he or she is being assessed. However, it is the skill of the assessor to reduce this pressure to a minimum.

### **4.2 Use of Simulation in Assessments**

As stated above, it is intended that learners should be assessed under normal workplace conditions. However, there are situations where the actual workplace may not be appropriate, or where waiting for naturally occurring evidence is impractical. Therefore, the setting up or devising of assessment situations will be allowed, when it can be demonstrated that the following circumstances require it in areas related to:

- safety
- legislation
- regulation
- contingency
- cost
- significant interruption to candidate's or employer's business.

It is recognised that there may be other assessment situations where simulation would be appropriate. In such instances, awarding organisations should give consideration to the reliability and validity of the likely evidence. In all cases, the centre should agree its plans for simulation with the EV to ensure that it is satisfactory.

## **5. Competence of Assessment Personnel**

GoSkills acknowledges the very important role and responsibility that assessors and verifiers have in maintaining the quality and integrity of NVQ QCF Qualifications. Awarding organisations and other stakeholders therefore have to have confidence in the actions and decisions of assessors and verifiers.

### 5.1 Competence of External Verifiers

A primary responsibility of the external verifier is to assure quality of internal verification and assessments across the centres for which they are responsible and to ensure that centres are assessing in line with the requirements of the National Occupational Standards for Road Passenger Transport Operations. External verifiers therefore need to have a thorough understanding of quality assurance and assessment practices as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

It will be the responsibility of the awarding organisation to select and appoint external verifiers. Potential external verifiers should:

- hold (or be working towards) an appropriate qualification confirming their competence to externally verify qualifications.
- have an up to date and working understanding of the occupational area they are externally verifying together with a sound knowledge of the occupational standards.
- demonstrate their commitment to maintaining their industry knowledge by ongoing professional development eg through undertaking training courses and/or membership of industry organisations.

### 5.2 Competence of Internal Verifiers

A primary responsibility of the internal verifier is to assure the quality and consistency of assessments by the assessors for whom they are responsible. Internal verifiers therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying.

It will be the responsibility of the approved centre to select and appoint internal verifiers. Potential internal verifiers should:

- hold (or be working towards) an appropriate qualification confirming their competence to internally verify qualifications;
- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to verify candidates;
- have the necessary and sufficient experience of the role for which they intend to verify assessments. This experience will have provided potential verifiers with detailed knowledge of the functions described by the occupational standards that comprise the qualification

### 5.3 Competence of Assessors

The primary responsibility of the assessor is to assess candidates to the required quality and consistency, against the national occupational standard. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in depth technical understanding related to the qualifications for which they are assessing candidates.

It will be the responsibility of the approved centre to select and appoint assessors. Potential assessors should:

- hold (or be working towards) an appropriate qualification confirming their competence to assess candidates.
- have the necessary and sufficient experience of the role for which they intend to undertake assessments and actual experience of the functions described by the occupational standards that comprise the qualification.

### 5.4 Continued Personal and Professional Development

It is important that verifiers and assessors continue their own development to help them in their respective NVQ roles. It is expected that each approved centre will provide development programmes for its assessors and internal verifiers to maintain their technical or occupational expertise.

Awarding organisations should provide development programmes, workshops, seminars, etc, to promote good practice, quality and consistent assessments.



## **Annexe E: Additional requirements for qualifications that use the term ‘NVQ’ in a QCF qualification title**

---



# **Additional Requirements for Qualifications that use the title**

## **NVQ within the QCF**

**September 2009**

This document has been produced by the Joint Awarding Body/SSC Working Practices Group which has been formed by the respective representative bodies to support and encourage effective working relationships between SSCs, submitting organisations and awarding organisations. The Group will update the document as necessary to make sure it is kept up to date and relevant and will consider developing additional guidance.

## Purpose of document

- 1 The purpose of this document is to make clear what additional requirements are needed to assess and quality assure qualifications that use the title NVQ within the QCF.
- 2 When an SSC/SSB and awarding organisation wants to use the title NVQ in the naming of a qualification within the QCF, the awarding organisation is required to make sure this qualification is assessed and quality assured in accordance with these additional requirements and other requirements described in the SSC/SSB assessment strategy.
- 3 The aims of these additional requirements are to
  - ensure that all competence based qualifications that use the title NVQ within the QCF are
    - assessed consistently
    - quality assured consistently
  - maintain the integrity of qualifications that use the title NVQ within the QCF
  - establish the NVQ brand within the QCF
  - keep bureaucracy associated with assessment and quality assurance of qualifications that use the title NVQ within the QCF to a minimum.

## Background

- 1 <sup>1</sup> "At the heart of an NVQ is the concept of occupational competence; the ability to perform to the standards required in employment across a range of circumstances and to meet changing demands. NVQs are first and foremost about what people can do. They go beyond technical skills to include planning, problem solving, dealing with unexpected occurrences, working with other people and applying the knowledge and understanding that underpins overall competence".
- 2 NVQs are based entirely on National Occupational Standards (NOS) developed by an SSC/SSB, which describe the competence needed in an occupational role.
- 3 Qualifications that use the title NVQ within the QCF must comply with the rules of combination determined by the SSC/SSB. Awarding organisations are not allowed to develop another qualification that does not use the title NVQ within the QCF, if it uses the same rules of combination as a qualification that does use the title NVQ within the QCF.

---

<sup>1</sup> NCVQ's NVQ Criteria and Guidance 1995.

- 4 The QCF offers increased flexibility in the way occupational competence can be assessed and demonstrated. Qualifications that use the title NVQ in the title within the QCF are just one way of assessing and demonstrating occupational competence. SSCs/SSBs are free to work with their awarding organisations to agree what qualifications will be used to assess occupational competence. Qualifications that use the title NVQ within the QCF, are not a preferred method for assessing occupational competence and all qualifications accredited through the QCF have equal status.
- 5 When developing a qualification for the QCF, including qualifications that use the title NVQ within the QCF, an awarding organisation must be a recognised awarding organisation and must meet the Qualification Requirements in the Regulatory Arrangements for the Qualifications and Credit Framework, published by The Office of the Qualifications and Examinations Regulator (Ofqual) in August 2008.
- 6 The qualification regulators confirmed that a group of SSCs and SSBs would be free to develop specific, additional requirements about the way in which qualifications that use the title NVQ within the QCF will be assessed and quality assured. For those recognised awarding organisations that want to assess occupational competence through the use of qualifications that use the title NVQ within the QCF, it has been agreed by SSCs and SSBs that the following additional requirements must be met.

## **Additional requirements for qualifications that use the title NVQ within the QCF**

### **Introduction**

- 1 Qualifications that use the title NVQ within the QCF must be assessed and quality assured in accordance with the following additional requirements.

### **Assessment requirements**

- 1 When a qualification uses the title NVQ within the QCF, awarding organisations are required to make sure their recognised assessment centres understand how learners are to be assessed.
2. Assessment methodologies must meet the assessment strategy developed in partnership between the relevant SSC or SSB and awarding organisations for the qualification. The assessment strategy must be published and made available separately and will include the requirements for assessment of qualifications that use the title NVQ within the QCF. The assessment criteria for each unit will be part of the units that make up the qualification.
3. Learners must complete real work activities in order to produce evidence to demonstrate they have met the NOS and are occupationally competent.

- 4 When a learner cannot complete a real work activity, simulation is allowed.
- 5 Simulation is allowed when
  - a learner is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise
  - a learner is required to respond to a situation that rarely occurs, such as responding to an emergency situation
  - the safety of a learner, other individuals and/or resources will be put at risk.
- 6 When simulation is used, assessors must be confident that the simulation replicates the workplace to such an extent that learners will be able to fully transfer their occupational competence to the workplace and real situations.
- 7 Units that must not be assessed by simulation must be identified by the SSC/SSB in the assessment strategy for the qualification or family of qualifications.
- 8 Learners must be assessed by assessors
  - who are occupationally competent in the occupational areas they are assessing where they have sufficient and relevant technical/occupational competence in the unit, at or above the level of the unit being assessed and as defined by the assessment strategy for that qualification
  - <sup>2</sup>who must hold or be working towards a suitable assessor qualification to confirm they understand assessment and how to assess learners
  - must be fully conversant with the unit(s) against which the assessments and verification are to be undertaken.
- 9 All assessors must carry out assessment to the standards specified in the A units.
- 10 All assessment decisions made by a trainee assessor must be checked by a qualified assessor or an assessor recognised by an awarding organisation.
- 11 Trainee assessors must have a plan, which is overseen by the recognised assessment centre, to achieve the relevant assessor qualification(s) within an agreed timescale.

---

<sup>2</sup> Currently an assessor could hold unit A1 and/or unit A2. Or from the past unit D32 and/or unit D33. SSCs also identify other suitable equivalent qualifications.



## Quality assurance requirements

- 1 When a qualification uses the title NVQ within the QCF, awarding organisations are required to make sure their recognised assessment centres understand how the qualification will be quality assured.
- 2 Qualifications that use the title NVQ within the QCF, must be verified
  - internally by an internal verifier, who is accountable to the assessment centre
  - externally by an external verifier, who is accountable to the awarding organisation or an agent of the awarding organisation.
- 3 With reference to internal verification, internal verifiers must
  - <sup>3</sup>hold or be working towards a suitable internal verifier qualification to confirm they understand how to internally verify assessments
  - have sufficient and relevant technical/occupational familiarity in the unit(s) being verified
  - be fully conversant with the standards and assessment criteria in the units to be assessed
  - understand the awarding organisation's quality assurance systems and requirements for this qualification.
- 4 Trainee internal verifiers must have a plan, which is overseen by the recognised assessment centre, to achieve the internal verifier qualification within an agreed timescale.
- 5 With reference to external verification, external verifiers must
  - <sup>4</sup>hold or be working towards a suitable external verification qualification to confirm they understand and are able to carry out external verification
  - have no connections with the assessment centre, in order to maintain objectivity
  - have sufficient and relevant technical/occupational understanding in the unit(s) being verified
  - be fully conversant with the standards and performance criteria in the units to be assessed
  - understand the awarding organisation's quality assurance systems for this qualification.
- 6 Trainee external verifiers must have a plan, which is overseen by the awarding organisation, to achieve the external verifier qualification within an agreed timescale.

---

<sup>3</sup> Currently an internal verifier needs to hold unit V1. Or from the past unit D34. SSCs also identify other suitable equivalent qualifications.

<sup>4</sup> Currently an external verifier needs to hold unit V2. Or from the past unit D35.

- 7 Awarding organisations must decide the frequency of external monitoring activities. Any decision must be based on
  - the risks associated with a qualification that is designed to help a learner demonstrate occupational competence
  - an evaluation of the centre's performance and past record.
- 8 Awarding organisations will have in place suitably constituted audit processes, which are supported by naturally occurring quality assurance and monitoring systems that already exist in workplace assessment environments.

## Annexe F: Simulation

Evidence requirements for the units of assessment in the Level 2 NVQ Certificate in Operational Support in the Bus and Coach Industry (QCF) are detailed at unit level. The list below indicates which units can be assessed through simulation. This applies only to GoSkills units; imported units have not been included in the list.

Unit name	Unit code	Simulation allowed
Achieve effective working relationships with colleagues in Road Passenger Transport Operations (RPVD unit)	RPVD 7	N
Provide professional customer service in road passenger transport operations	RPTO 3	N
Support learners by coaching in the workplace (BACEM unit)	BACEM 38	N
Develop and maintain your work skills and knowledge in the Passenger Transport Industry	RPTO 9	N
Manage Conflict in Road Passenger Transport Industries	RPTO 10	Y
Prepare vehicle and driver rotas for road passenger transport timetabled operations	RPTO 19	Y
Implement schedules for road passenger transport operations	RPTO 20	Y
Take telephone bookings in road passenger transport industries	RPVD 20	Y
Provide support to passengers with a severe disability	RPTO 25	Y
Provide support to passengers who require assistance	RPTO 26	Y
Plan road passenger transport routes for customers	RPTO 31	N
Operate an IT system in road passenger transport	RPTO 37	Y



## Annexe G: Assessment guidance

---

The following information has been provided by GoSkills for the Road Passenger Vehicle Driving (Community Transport) units where employers in the sector have indicated specific assessment criteria required to ensure that the units of assessment are being assessed consistently across all awarding organisations' centres. This guidance should be referred to when delivering the units.

<b>Ensure responsibility for actions to reduce risks to health and safety (Unit 1 in this specification)</b>	
--	--

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

<b>RPVD 7 – Achieve effective working relationships with colleagues in the road passenger travel industries (Unit 2 in this specification)</b>	
--	--

Assessment guidance specified by a sector or regulatory body	When assessing this unit the following definitions should be used: <ul style="list-style-type: none"><li>the organisation – this would be the company the learner works for or, if they are self-employed, the rules they have set for themselves to ensure that they comply with relevant legal and licensing requirements.</li></ul>
--	--

<b>RPTO 3 – Provide professional customer service in road passenger transport (Unit 3 in this specification)</b>	
--	--

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**BACEM 39 – Support learners by coaching in the workplace (*Unit 4 in this specification*)**

Assessment guidance specified by a sector or regulatory body	<p>Learners should be able to provide coaching activity to a range of individuals to include, as appropriate:</p> <ul style="list-style-type: none"><li>• new starters</li><li>• individuals unfamiliar with a particular technical matter</li><li>• individuals undertaking training to increase workplace skills</li><li>• individuals experiencing difficulty in specific technical aspects of their work.</li></ul> <p>Learners should be able to communicate in the following ways:</p> <ul style="list-style-type: none"><li>• face-to-face verbal communication</li><li>• small-group discussion</li><li>• presentation on technical issues to small groups</li><li>• written communication</li><li>• IT-based coaching programmes.</li></ul> <p>Examples of problems may include, where relevant, those from overseas needing for example language skills, as well as experienced staff requiring further development in workplace skills.</p>
--	--

**RPTO 9 – Develop and maintain work skills and knowledge in the passenger transport industry (*Unit 5 in this specification*)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**RPTO 10 – Manage Conflict in the Road Passenger Transport Industry (Unit 6 in this specification)**

Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definitions should be used:</p> <ul style="list-style-type: none"><li>• people – colleagues, passengers and members of the general public</li><li>• inappropriate behaviour could include:<ul style="list-style-type: none"><li>• verbal or physical abuse</li><li>• actions that could cause a danger to others</li><li>• actions that could cause damage to property</li><li>• not keeping to conditions of service</li><li>• illegal or offensive acts.</li></ul></li></ul>
--	--

**Resolve customer service problems (Unit 7 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**Deal with customers in writing or using ICT (Unit 8 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**Deal with customers by telephone (Unit 9 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**Deal with customers face-to-face (Unit 10 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

<b>Support customer service improvements (<i>Unit 11 in this specification</i>)</b>	
Assessment guidance specified by a sector or regulatory body	N/A

<b>RPTO 19 – Prepare vehicle and driver rotas for road passenger transport timetabled operations (<i>Unit 12 in this specification</i>)</b>	
Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definitions should be used:</p> <ul style="list-style-type: none"> <li>• vehicle rota – a set of vehicle workings often referred to as a bus graph and known as a vehicle duty</li> <li>• driver rota – the complete collection of all the work for defined set of drivers over a set period of time.</li> </ul>

<b>RPTO 20 – Implement schedules for road passenger transport operations (<i>Unit 13 in this specification</i>)</b>	
Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definition should be used:</p> <ul style="list-style-type: none"> <li>• the organisation – this would be the company the learner works for or, if they are self-employed, the rules they have set for themselves to ensure that they comply with relevant legal and licensing requirements.</li> </ul>

<b>RPVD 20 - Process telephone bookings in the road passenger transport industries (<i>Unit 14 in this specification</i>)</b>	
Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definitions should be used:</p> <ul style="list-style-type: none"> <li>• the organisation – this would be the company the learner works for or, if they are self-employed, the rules they have set for themselves to ensure that they comply with relevant legal and licensing requirements</li> <li>• prospective passenger is used to denote both a single individual or a group.</li> </ul>



**RPTO 25 – Provide support to passengers with a severe disability  
(Unit 15 in this specification)**

Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definitions should be used:</p> <ul style="list-style-type: none"><li>the organisation – this would be the company the learner works for or, if they are self-employed, the rules they have set for themselves to ensure that they comply with relevant legal and licensing requirements</li><li>passenger with a severe disability – a passenger who can not be moved without considerable support, for example; the passenger may use a wheelchair, stretcher or trolley.</li></ul>
--	---

**RPTO 26 – Provide support to passengers who require assistance  
(Unit 16 in this specification)**

Assessment guidance specified by a sector or regulatory body	<p>When assessing this unit the following definitions should be used:</p> <ul style="list-style-type: none"><li>the organisation – this would be the company the learner works for or, if they are self-employed, the rules they have set for themselves to ensure that they comply with relevant legal and licensing requirements.</li></ul>
--	---

**RPTO 27 – Monitor revenue protection and timetables in road passenger transport operations (Unit 17 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

**RPTO 31 – Plan road passenger transport routes for customers (Unit 18 in this specification)**

Assessment guidance specified by a sector or regulatory body	N/A
--	-----

<b>RPTO 37 – Operate an IT system in road passenger transport (<i>Unit 19 in this specification</i>)</b>	
Assessment guidance specified by a sector or regulatory body	N/A

**Ofqual**  
.....



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

Publications Code N025394 March 2011

For more information on Edexcel and BTEC qualifications please  
visit our website: [www.edexcel.com](http://www.edexcel.com)

Edexcel Limited. Registered in England and Wales No. 4496750  
Registered Office: One90 High Holborn, London WC1V 7BH. VAT Reg No 780 0898 07

